

Heritage Lottery Fund

Evaluation of the Sharing Heritage programme

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Final report

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Executive summary

Background

Context

In June 2015, Heritage Lottery Fund (HLF) commissioned Simon Jaquet Consultancy Services Ltd (SJCS) to undertake an evaluation of the 'Sharing Heritage' grants programme. 'Sharing Heritage' is HLF's smallest grants programme. It provides grants of £3,000 - £10,000 for small-scale heritage projects. It is aimed primarily at voluntary sector groups and community organisations. The 'Sharing Heritage' grants programme was launched in February 2013 and is scheduled to run until March 2018 (the duration of the current HLF Strategic Framework).¹

As of June 2015, when this evaluation was commissioned, 1180 project applications under the 'Sharing Heritage' grants programme had been received. Of these, 717 had been approved for funding, and 260 had been completed. The total amount awarded was £5.4 million.

Aims and objectives of the evaluation

The overall purpose of the evaluation is to provide greater understanding of the 'Sharing Heritage' grants programme and to inform its future development. There are four aims for the evaluation:

1. To establish the extent to which the outcomes in the current strategic framework are being achieved by the programme;
2. To establish how the Outcomes Framework impacts on project design, planning, and delivery;
3. To assess the applicants' experience of the grant making process;
4. To assess the effectiveness of the current business model in providing an entry route into heritage for new and diverse groups.

Methodology

There are five main elements to the evaluation. These are:

- a) A profiling exercise to provide an overview of the applications received, and the success rates for applications based on a range of factors;
- b) A paper based review of 100 completed projects to examine the extent to which i) 'approved purposes' and HLF outcomes signalled in the project application have been achieved (based on evidence in the end of project reports), and ii) the project assessments (case papers) undertaken by HLF in preparation for funding decisions are robust;
- c) Telephone interviews with (35) completed projects to discuss the project in more depth;
- d) Telephone interviews and a review of the project assessments (case papers) with (15) unsuccessful applicants to discuss the impacts of not receiving the grant; and

¹ [HLF Strategy](#)

- e) Case study visits with (10) completed projects to hear from the organisations themselves, and also from partners, beneficiaries and other stakeholders.

Findings

Profile of applications

The key findings from the analysis of the profile of applications are that:

- 61% of applications to Sharing Heritage are successful.
- The success rates for almost all subgroups (based on the factors examined) are in the range 56%-76%. The exceptions to this are in relation to: i) the regional classification (less than half of the applications from both the North East (44%) and Wales (40%) are successful), and ii) the wider community groups (Black, Asian and minority ethnic (BAME), disability, and lesbian, gay, bisexual and transgender (LGBT)) where success rates are in the range 86% - 100%.
- Two-thirds (67%) of funded applications come from organisations who are applying for the first time.
- Almost three-quarters of funded applications (72%) are from community / voluntary groups, with a further 5% coming from church or faith based organisations.
- Funded applications are dominated by 'intangible heritage' (40%) projects and 'community heritage' (32%) projects with smaller numbers covering museums and libraries (10%), historic buildings and monuments (8%), land and biodiversity (6%) and industrial and maritime (4%).
- Overall, 5.6% of applications received are relevant to BAME communities (3.7% are BAME led, and a further 1.9% seek to engage with BAME communities), 2.4% focus on disability, and only 0.4% focus on LGBT heritage.

Review of 100 selected projects

The key findings from the review of the 100 selected projects are that:

- Three-quarters of projects (76%) fully achieve their 'agreed purposes' and almost two-thirds of projects (64%) fully achieve their intended outcomes; almost all the remaining projects are judged to have partially achieved their agreed purposes / intended outcomes. Just one project did not achieve any outcomes.
- Almost all projects (96%) achieve three or more outcomes; a large majority of projects both aim to (89%), and are successful (74%) in achieving, 6 or more outcomes from the HLF Outcomes Framework; and more than 9 in 10 projects (91%) achieve the outcome which is given most weight by HLF 'people will have learnt about heritage'.
- The outcomes relating to boosting the local economy and reducing negative environmental impacts are rarely intended (12% and 8% respectively) and even more rarely achieved (1% and 5% respectively).
- The assessments undertaken by HLF in their case papers appear to be fairly robust, and the risk and value for money assessments are generally congruent with the findings of the independent evaluation. However, there may be a small degree of

over optimism in the case papers in relation to the achievement of outcomes, especially in relation to communities outcomes.

- In approximately one-quarter of cases, there is a shortfall in the volunteering activity as identified in application forms.

Interviews with 35 successful applicants

The key findings from the telephone interviews are that:

- While there is evidence of projects contributing to all 14 outcomes comprising the HLF strategic framework, the greatest focus of projects is on learning about heritage, interpreting heritage, the development of skills, and the use of volunteers. The importance of people enjoying the heritage experience is also central.
- Organisations and groups delivering projects have developed increased confidence to develop and deliver heritage projects. This is particularly true for small community groups (especially those with no paid staff). Organisational resilience has been enhanced through having an increased organisational profile, strengthened relationships with partner organisations, the recruitment of volunteers, and increased income.
- The application process is seen as straightforward and manageable, and provides a good 'fit' with the capabilities of the organisations who apply. Direct contact with HLF staff is much appreciated. The Outcomes Framework is viewed as a helpful guide (particularly for non-heritage organisations), rather than as a formal requirement.
- There is evidence of some enduring sustainability or legacy for most projects in either the short, medium, or long term - in terms of the availability of project outputs, and the enhanced resilience of the organisation.
- A relatively modest investment of grant funding can achieve substantial impact, particularly in relation to small community and voluntary organisations (with no paid staff).

Interviews with 15 unsuccessful applicants

The key findings from the telephone interviews with unsuccessful interviews are that:

- Those who are unsuccessful in their applications have an awareness of the Sharing Heritage programme and specifically of the HLF Outcomes Framework. More established organisations have a more in-depth understanding of the details of the framework.
- A minority of those whose projects are unsuccessful are negative about the application process and the Sharing Heritage programme. Whilst not all volunteer led organisations are negative about their experience, negative views are concentrated within this sector.
- The input of HLF staff is valued and appreciated by those who submit applications which are not successful.
- The aspect of the process which receives most criticism relates to the feedback to unsuccessful applicants; this is particularly the case for applications which went through an Expression of Interest stage and where applicants felt they had followed the advice they were given to the letter.

- In around half the cases no further development of the project has taken place since the application was unsuccessful; however in the other half of cases the project has been progressed, often at a slower pace or in a slightly different form.
- The case paper assessments for three of the 15 unsuccessful applications were very positive.

10 case studies

The key findings from the case studies are that:

- The projects operate in highly specific local contexts. They have all been able to 'work with the grain' of this local context and to maximise opportunities for development, learning and sharing.
- Projects and partner organisations were able to provide substantial evidence that HLF outcomes had been achieved, with all projects achieving multiple outcomes.
- Volunteers play a role in the majority of projects, but are especially important in small, community-based projects where the leadership function is taken by a volunteer. There is sometimes a risk of overload on this key individual in these cases.
- There are examples of practice which describe practical methods for engaging particular communities (BAME, disability, homeless).
- Partnership working with a wide range of public, private, and third sector partners is key to making an impact and to leaving a sustainable legacy. Again, there are useful models of practice.
- The process of delivering the Sharing Heritage project enhances the organisational self confidence and credibility of the host organisation. In many cases this had led on to the development and delivery of further heritage projects.

Conclusions

The overall picture of the Sharing Heritage programme which has emerged from this evaluation is broadly positive from the point of view of both processes and outcomes.

Achievement of HLF outcomes

On the whole, projects seek to achieve multiple outcomes, rather than being limited to one or two. There is a strong relationship between the outcomes that projects intended to achieve and the outcomes which were actually achieved. HLF's prioritisation of the outcome relating to 'learning about heritage' is reflected in the applications which it funds. Almost all projects address this outcome successfully.

The skills which are developed as a consequence of the Sharing Heritage Programme are wide ranging. A substantial majority of projects involve volunteers, often in significant numbers. However, there is also evidence that the numbers of volunteers actually involved is smaller than intended in around one-quarter of projects. Most projects are able to demonstrate a degree of sustainability. This is largely as a result of new skills having been developed, partnerships having been forged, the creation of new relationships and networks, and the organisational profile being raised.

Impact of the Outcomes Framework on project design, planning and delivery

The Outcomes Framework provides helpful clarity about what HLF wants to achieve, and applicants are aware of it. However for many of the smaller organisations, especially those which are volunteer led (with no paid staff), familiarity with the framework is at a very general level.

In most cases, the Outcomes Framework tends to be used retrospectively to interpret project outcomes, rather than prospectively to plan and design the project. The impact of the Outcomes Framework would be increased if the paperwork required by HLF (application form, end of grant report) required more explicit reference to it.

Grant making process

The grant application process is 'fit for purpose'. The 'light touch' approach is appropriate and the relationships between applicants and HLF staff are on the whole excellent. There is a continued requirement for interaction with HLF staff. The group of organisations who find the grant making process most challenging are small, volunteer led organisations. There is scope to improve the feedback given to organisations whose projects are not successful.

New and diverse groups

The Sharing Heritage programme has been fairly successful in attracting first time applicants, and applications from the community / voluntary sector, as well as applications from organisations who would not see themselves primarily as 'heritage' organisations. However, the programme has been less successful in attracting applications from a wider range of communities which are important to HLF namely: Black Asian and minority ethnic (BAME) groups, disability groups, and LGBT groups.

The small volunteer led community groups (with no paid staff) provide high added value in terms of social and cultural capital, and can offer a potentially useful entry point for the BAME, disability, LGBT (and other) groups.

Issues for further consideration

We have set out our thoughts on the development of the Sharing Heritage programme, based on four 'scenarios'.

Scenario 1 – Building on the status quo

This could include elements such as:

- Improving the HLF database;
- Revisiting some of the definitions within the Sharing Heritage programme;
- Developing the guidance offered to awardees and applicants;
- Incorporating the Outcomes Framework into application forms and end of grant reports;
- Offering additional support to volunteer led organisations (with no paid staff) throughout the application, delivery, and reporting process;
- Benchmarking quality across regions.

Scenario 2 – Developing a stronger focus on community / voluntary organisations (with no paid staff)

This could include elements such as:

- Targeting the programme more strongly towards community / voluntary organisations (with no paid staff);
- Improving the penetration into ‘new and diverse’ community groups;
- Providing additional support / alternative application process for volunteer led organisations (with no paid staff).

Scenario 3 – Revisiting the relationship between the Outcomes Framework and the Sharing Heritage Programme

This could include elements such as:

- Raising the minimum requirement of outcomes to be achieved;
- Defining outcomes and how to measure them;
- Simplifying the Outcomes Framework;
- Developing a Logic Model.

Scenario 4 – Developing a strategic partnership with UK Arts Councils

This could include elements such as:

- Dialogue at a senior level with Arts Council England, Creative Scotland, Arts Council of Northern Ireland, and Arts Council of Wales;
- Developing a range of case studies of relevant projects which demonstrate the quality and variety of exemplar projects from the Sharing Heritage programme.

1 Introduction

- 1.1 The Heritage Lottery Fund (HLF) launched the 'Sharing Heritage' grants programme in February 2013 as a way of 'helping people across the UK explore, conserve and share all aspects of the history and character of their local area'.
- 1.2 In June 2015, HLF commissioned Simon Jaquet Consultancy Services Ltd (SJCS) to undertake an evaluation of the 'Sharing Heritage' grants programme. This report presents the findings of the evaluation, and discusses a range of issues relating to the development of the programme.

2 Background

Overview of the 'Sharing Heritage' grants programme

- 2.1 'Sharing Heritage' is the programme through which the Heritage Lottery Fund offers its smallest grants. It provides grants of £3,000 - £10,000 for small-scale heritage projects to help people discover and share their local heritage. It is aimed primarily at voluntary sector groups and community organisations. Sharing Heritage also funds applications from partnerships led by not-for-profit organisations.
- 2.2 The 'Sharing Heritage' grants programme was launched in February 2013 and is scheduled to run at least until March 2018 (the duration of the current HLF Strategic Framework).²
- 2.3 'Sharing Heritage' is an open programme; applications are accepted at any time and for any type of heritage activity. The programme is characterised by the wide range of types of projects it funds. Project activities include for example: events, exhibitions, festivals and celebrations, local history publications, the recording of oral histories, conservation of individual heritage items, small acquisitions, local archaeology projects, projects concerned with specific community traditions or events, managing and training volunteers, developing new heritage trails, and identifying and protecting local wildlife.
- 2.4 The application and monitoring process for these grants is deliberately 'light touch', an approach which was confirmed to be appropriate by the evaluation of an earlier similar programme.³ The application form is short, there is a single grant payment, and the final report to be submitted on completion is fairly straightforward. This 'light touch' approach is intended to encourage applications from new and diverse groups with no prior experience of grant application processes, as well as more experienced organisations.
- 2.5 As of June 2015, when this evaluation was commissioned, 1180 project applications under the 'Sharing Heritage' grants programme had been received. Of these, 717 had been approved for funding, and 260 had been completed. The total amount awarded was £5.4million.

Heritage Lottery Fund Outcomes Framework

- 2.6 The current (fourth) HLF Strategic Framework (sometimes referred to as 'SF4') contains an Outcomes Framework to guide HLF's investment decisions. The Outcomes Framework specifies a focus on 14 outcomes, grouped into three broad areas as follows:

Outcomes for heritage

- Heritage will be better managed
- Heritage will be in better condition
- Heritage will be better interpreted and explained
- Heritage will be identified / recorded

² [HLF Strategy](#)

³ [All Our Stories Evaluation](#)

Outcomes for people

- People will have developed skills
- People will have learnt about heritage
- People will have changed their attitudes and / or behaviour
- People will have had an enjoyable experience
- People will have volunteered time

Outcomes for communities

- Negative environmental impacts will be reduced
- More people and a wider range of people will have engaged with heritage
- Your local area / community will be a better place to live, work or visit
- Your local economy will be boosted
- Your organisation will be more resilient.

2.7 This Outcomes Framework applies to the whole range of HLF funding. However, as far as the 'Sharing Heritage' programme itself is concerned, the requirement for an individual project is that it should achieve at least one outcome from the grouping 'Outcomes for people'. The outcome which HLF values most is that 'people will have learnt about heritage'.

Purpose of the evaluation

2.8 The overall purpose of the evaluation is to provide greater understanding of the 'Sharing Heritage' grants programme and to inform its future development.

Aims and objectives of the evaluation

2.9 There are four aims for the evaluation as follows:

1. To establish the extent to which the outcomes in the current strategic framework are being achieved by the programme;
2. To establish how the Outcomes Framework impacts on project design, planning, and delivery;
3. To assess the applicants' experience of the grant making process;
4. To assess the effectiveness of the current business model in providing an entry route into heritage for new and diverse groups.

2.10 The objectives for the evaluation are to examine:

- a) What types of organisation and what types of project apply to the programme, including:
 - the profile of applicants to Sharing Heritage (e.g. type of organisation, funding status of organisations, first time and repeat applicants, Priority Development Area (PDA) status of organisations⁴, diversity of applicant groups);
 - the types of heritage that groups choose to feature in projects e.g. archives, intangible heritage etc;
 - the range of people involved in projects, (e.g. people with no previous experience or involvement with heritage, volunteers, paid staff);

⁴ Organisations are attributed PDA status on the basis of the area in which they are located. Organisations with PDA status are a strategic priority for HLF.

- the types of activities undertaken within projects.
- b) What the projects achieve, and over what timescale, including:
- the heritage outcomes proposed by applicants, and the degree to which these are achieved;
 - the outcomes for people proposed by applicants, and the degree to which these are achieved;
 - the community outcomes proposed by applicants, and the degree to which these are achieved;
 - the sustainability and legacy of the activities, projects or outcomes over the short and medium term.
- c) What the applicants' experience of the Sharing Heritage grants programme is, including:
- the applicants' motivations for applying;
 - the benefits, if any, for the organisation (e.g. increased capacity and / or capability to undertake further heritage activity or projects, or to undertake other activities);
 - the applicants' experience of HLF's application and grant management process;
 - any lessons learnt or suggested improvements to the Sharing Heritage programme and / or current business model.

Structure of the report

2.11 The report is structured as follows:

- Chapter 3 contains details of the research approach and describes its limitations;
- Chapter 4 describes the profile of the (1180) grant applications which have been received to date;
- Chapters 5-8 report the findings from the multi-methods evaluation;
- Chapter 9 discusses the findings, and places them in the wider context of programme development;
- Chapter 10 contains the conclusions;
- Chapter 11 raises issues for further consideration.

2.12 Additional material is contained in the Appendices.

3 Research approach

Overview

- 3.1 The evaluation uses a mixed-methods approach, combining both quantitative and qualitative elements.
- 3.2 There are five main aspects to the evaluation. These are:
- a) A profiling exercise to provide an overview of the applications received, and the success rates for applications based on a range of factors (including type of organisation, type of project, whether or not first time applicant, region etc.) (See Chapter 4);
 - b) A paper based review of 100 completed projects to examine the extent to which i) 'approved purposes' and HLF outcomes signalled in the project application have been achieved (based on evidence contained in the written reports received from grant recipients at the end of their project) and ii) the project assessments (case papers) undertaken by HLF in preparation for funding decisions are robust (See Chapter 5);
 - c) Telephone interviews with (35) completed projects to discuss the project in more depth and specifically to explore issues around achievement of outcomes, legacy and sustainability, partnership, capacity building, and views of the application process (See Chapter 6);
 - d) Telephone interviews and a review of the project assessments (case papers) with (15) unsuccessful applicants to discuss the impacts of not receiving the grant, whether the project has been delivered by other means, and views of the application process (See Chapter 7); and
 - e) Case study visits with (10) completed projects to hear not only from the organisations themselves, but also from other partners, beneficiaries and stakeholders about the successes, challenges and impacts of the project (See Chapter 8).
- 3.3 Each of these elements is described in greater detail in the relevant chapter.

Limitations of the research approach

- 3.4 As set out above, at the time of writing 717 applications have been awarded funding under the Sharing Heritage programme, of which 260 have been completed.
- 3.5 It is important to recognise that even where a project has been completed, it is not always straightforward to link any outcomes achieved to the specific project funding which was awarded. There are often many other influences or contextual factors at play (social, economic, environmental), which are not under the control of the organisation in receipt of funding, and which may affect the extent to which outcomes are (or are not) achieved. This issue of 'attribution' has been widely discussed within the policy research literature and has led to the development of tools such as logic models and theories of change ⁵; the relevance here is to strike a note of caution in linking inputs (grant funding) to the achievement of outcomes in a simplistic way.

⁵ [Contribution Analysis](#)

- 3.6 Moreover, the legacy aspects of funded projects often evolve over a long period of time. So, a further evaluation (in, say, 2020) would be required to fully capture any long term impacts of the Sharing Heritage grants programme.
- 3.7 Finally, the review of the 100 projects (described at para 3.2 above) has been based on the material submitted in the project application forms and end of grant reports, as well as on the 'case papers' compiled by HLF in preparation for decision making. These are fairly short documents, as is appropriate for the 'light touch' approach described above. In particular, there is no specific question in the project application form which requires organisations to set out which HLF outcomes their projects are intended to achieve and no specific question in the end of grant report which requires organisations to report their outcomes against either their intended outcomes or against the HLF Outcomes Framework. Chapter 5 below sets out how we have approached the analysis of this material.

4 Findings: profile of applications

- 4.1 The database provided by HLF contained information about 1180 applications. These applications were received and reviewed by HLF over a three year period (2012-2014). Of these, 717 (61%) were approved for funding and 458 (39%) were rejected.⁶
- 4.2 The profile of applications was analysed in relation to a number of key variables of relevance to HLF, in particular:
- Whether the application was submitted by an organisation which had not previously applied for funding to HLF;
 - The type of organisation;
 - The type of heritage;
 - The size of the grant requested;
 - The region from which the grant was submitted;
 - The Priority Development Area (PDA) status of the grant;
 - Whether the project was submitted by an organisation representing a particular community typically under-represented in heritage work, for example, a Black, Asian or minority ethnic (BAME) group, a disability group or an organisation representing lesbian, gay, bisexual or transgender people (LGBT).
- 4.3 Tables 1 - 7 below show the profile of the applications in relation to these variables.

First time applicant status

- 4.4 Table 1 below shows that two-thirds of the applications received (67%) were from first time applicants. The proportion of applications which were successful was similar whether they were from first time (59%) or not first time (64%) applicants.

Table 1 First time applicant status of applications

Applicant status	No. received	No. received (%)	No. funded	No. funded (%)	Success rate (%)
First time applicant	791	67	468	65	59
Not first time applicant	376	32	242	34	64
Not Known	13	1	7	1	54
Total	1180	100	717	100	61

Type of organisation

- 4.5 Table 2 below shows that almost three-quarters of the applications received (72%) were from community / voluntary organisations, with a further 5% coming from church organisations or other faith based groups. Almost one-quarter of applications (23%) were from the public sector. The success rates across these organisational types varied, with local authority applications being the most likely to receive funding (71% of all applications) and 'other public sector' the least (58%).

⁶ The remaining 5 projects were funded but subsequently closed, or the funding withdrawn.

Table 2 Organisation type of applications

Organisation type	No. received	No. received (%)	No. funded	No. funded (%)	Success rate (%)
Church organisation or other faith-based group	55	5	33	5	60
Commercial organisation	1	0	0	0	0
Community/ voluntary	853	72	512	71	60
Local authority	114	10	81	11	71
Other Public Sector	157	13	91	13	58
Total	1180	100	717	100	61

Heritage type

- 4.6 Table 3 below shows that one third of applications (32%) were for community heritage, whilst 40% were for intangible heritage. Smaller numbers of projects were for museums and libraries (10%), historic buildings and monuments (8%), land and biodiversity (6%) and industrial maritime and transport (4%). The success rates ranged from 58% for intangible heritage to 67% for industrial maritime and transport.

Table 3 Heritage type of applications

Heritage type	No. received	No. received (%)	No. funded	No. funded (%)	Success rate (%)
Community Heritage	378	32	241	34	64
Historic Buildings and Monuments	99	8	59	8	60
Industrial maritime and transport	42	4	28	4	67
Intangible heritage	467	40	269	38	58
Land and biodiversity	73	6	44	6	60
Museums, Libraries etc	120	10	76	11	63
Non-heritage	1	0	0	0	0
Total	1180	100	717	100	61

Amount of grant requested

- 4.7 Table 4 below shows that almost two-thirds of applications (65%) are for larger grants (over £8000). The success rates of applications varied from 56% of small (£3000-£4999) grants to 67% of medium sized grants (£5000-£7999) and 60% of larger grants (£8000-£10000).

Table 4 Amount of grant requested (£)

Grant requested	No. received	No. received (%)	No. funded	No. funded (%)	Success rate (%)
Small (£3000-£4999)	145	12	81	11	56
Medium (£5000-£7999)	270	23	180	25	67
Large (£8000-£10000)	765	65	456	64	60
Total	1180	100	717	100	61

Region

- 4.8 Table 5 presents information in relation to the numbers of applications, and the proportions of successful applications by region. This shows that the number of applications for funding broadly mirrors the level of the population. For example, London and the South East (with approximately one quarter of the UK population), accounts for 25% of all submissions whereas Northern Ireland (with approximately 3% of the UK population), accounts for 3% of the submissions.
- 4.9 Funding rates across regions vary substantially. For example, in both Northern Ireland and Scotland, around three-quarters of all applications are funded (75% and 76% respectively). By contrast, less than half of the applications from Wales (40%) and the North East (44%) are successful.

Table 5 Applications by Region

Region	No. received	No. received (%)	No. funded	No. funded (%)	Success rate (%)
East Midlands	77	7	43	6	56
East of England	112	9	72	10	64
London	148	13	85	12	57
North East	64	5	28	4	44
North West	117	10	75	10	64
Northern Ireland	36	3	27	4	75
Scotland	106	9	81	11	76
South East	144	12	81	11	56
South West	115	10	76	11	66
Wales	94	8	38	5	40
West Midlands	87	7	56	8	64
Yorkshire and The Humber	80	7	55	8	69
Total	1180	100	717	100	61

Priority Development Area Status

- 4.10 Table 6 below shows that around 1 in 8 applications (13%) come from Priority Development Areas (PDAs). The success rate for applications located in a PDA (73%) is noticeably higher than the success rate for applications not located in a PDA (59%); this reflects the HLF decision making process which takes this factor into account when agreeing which projects to fund.

Table 6 Priority Development Area status of applications

PDA status	No. received	No. received (%)	No. funded	No. funded (%)	Success rate (%)
PDA	158	13	116	16	73
Not PDA	1022	87	601	84	59
Total	1180	100	717	100	61

Applications from a wider range of communities

- 4.11 HLF has a corporate priority to diversify its grant making with a particular focus on encouraging more fundable applications from groups representing BAME communities. The 'more and wider' outcome indicates a general intention to see a wider range of communities involved in heritage. Of the 1180 applications received: 44 (3.7%) were led by BAME communities, and a further 22 (1.9%) were seeking to engage with BAME communities; 28 (2.4%) had a focus on disability (for example, aiming to encourage new disabled audiences to engage with heritage); and five (0.4%) were focused on LGBT heritage (either because they were led by an LGBT group or because the project had a focus on historical LGBT figures or concerns).
- 4.12 Success rates for applications from each of these communities were very high (86% - 100%). See Table 7 below.

Table 7 Community group applications

Community group	No. received	No. received (%)	No. funded	No. funded (%)	Success rate (%)
BAME	66	5.6	62	8.6	94
BAME led	44	3.7	42	5.9	95
Seeking to engage	22	1.9	20	2.8	91
Disability	28	2.4	24	3.3	86
LGBT	5	0.4	5	0.7	100

Summary

- 4.13 The key findings from the analysis of the profile of applications are that:
- 61% of applications to Sharing Heritage are successful.
 - The success rates for almost all subgroups (based on the factors examined) are in the range 56%-76%. The exceptions to this are in relation to: i) the regional classification (less than half of the applications from both the North East (44%) and Wales (40%) are successful), and ii) the wider community groups (BAME, disability, LGBT) where success rates are in the range 86% - 100%.

- Two-thirds (67%) of funded applications come from organisations who are applying for the first time.
- Almost three-quarters of funded applications (72%) are from community / voluntary groups, with a further 5% coming from church or faith based organisations. Less than one-quarter of funded applications (23%) come from the public sector.
- Received applications are dominated by 'intangible heritage' (40%) projects and 'community heritage' (32%) projects with smaller numbers covering museums and libraries (10%), historic buildings and monuments (8%), land and biodiversity (6%) and industrial and maritime (4%).
- Overall, 5.6% of applications received are relevant to BAME communities (3.7% are BAME led, and a further 1.9% seek to engage with BAME communities), 2.4% focus on disability, and only 0.4% focus on LGBT heritage.
- Given that the success rates for applications received from wider community groups are very high, the proportions of funded applications are rather different to the proportions received: 8.6% for BAME communities (5.9% BAME led, 2.8% seeking to engage), 3.3% for disability, and 0.7% for LGBT.

5 Findings: review of 100 selected projects

- 5.1 In consultation with HLF, 100 projects were selected for further examination. These projects were a subset of the (260) completed projects. The selection used a 'purposive sampling' approach which sought to ensure that an appropriate mix of projects was achieved.
- 5.2 In particular, the sample selection process ensured that all regions, all organisational types, and all heritage types were represented; given that there were fairly small numbers of completed projects in some of these subgroups, this meant departing substantially from a random sampling approach. Moreover, given the specific HLF interest in Priority Development Areas (PDAs), as well as in BAME communities, projects from these groups were over-represented in the selection. Finally, checks were made that the selection included reasonably large numbers of small, medium and large grants as well as first time and not first time applicants. The profile of the final selection of 100 projects is included at Appendix 1.
- 5.3 The 100 selected projects provide a good illustration of the very wide range of projects funded through the Sharing Heritage programme. Each project was unique in terms of its setting, the geographical and social community it served, the heritage it wished to develop and share, and the activities which were undertaken.

Information provided on 100 selected projects

- 5.4 For each of the (100) selected projects, the application form and the end of grant report were made available, as well as the 'case papers' which are prepared by HLF staff in advance of the decision making meetings.
- 5.5 The application form provides information about the organisation applying for the grant, the heritage the project focuses on, the project activities, the anticipated outcomes, the timetable and the costs. The end of grant report provides information about what has been achieved in relation to the 'approved purposes' (the information included in the HLF grant award letter which reminds the grantee what they are committed to delivering as part of the project), the use of volunteers, the recruitment of staff, an expenditure breakdown, and a (self-) evaluation. The case papers contain information about the HLF officer's assessment of the project including an assessment of the extent to which heritage, people and communities outcomes will be achieved, a risk assessment, and an assessment of the value for money of the project.

Consideration of the information provided

- 5.6 The material provided was used to i) examine the extent to which the project's 'approved purposes' and HLF outcomes which were signalled in the application form have been achieved (based on evidence provided in the end of grant reports) and ii) examine the extent to which the project assessments undertaken by HLF in preparation for funding decisions are robust. Each of these two aspects is discussed in turn below.

Do projects achieve their 'approved purposes' / intended outcomes?

- 5.7 We undertook an assessment of each project, based on the submitted paperwork (application form, end of grant report) as follows:
- The 'approved purposes' of the project as submitted in the application were compared with the actual outputs as reported in the end of grant reports. Projects were assessed as either 'fully achieving', 'partially achieving', or 'not achieving' the approved purposes.
 - Using the material in the application form, we identified whether or not the project aimed to achieve each of the (14) outcomes in the HLF Outcomes Framework.
 - Using the material in the end of grant report, we assessed which of the (14) outcomes in the HLF Outcomes Framework the project achieved.
 - Using the material in the application form and the end of grant report, we made an assessment of whether the project as a whole had 'fully achieved', 'partially achieved' or 'not achieved' its intended outcomes.
- 5.8 This approach allowed us to make an assessment of i) whether the project had achieved its 'approved purposes' and ii) whether the project had achieved its intended outcomes.

Limitations of the approach

- 5.9 Grant recipients were not required to map either the intended outcomes of their project (in their project application) or the achieved outcomes (in their end of grant report) explicitly onto the HLF Outcomes Framework. Thus our assessment was based on our 'best guess', inferring an assessment from the material that was submitted; a large degree of subjective judgement was therefore necessary. Whilst this assessment is not robust enough to be used in isolation, it does provide an indication of the degree of congruence between the agreed purposes, the HLF Outcomes Framework and the achieved project outcomes.
- 5.10 Moreover, our assessment used a 'binary' approach to assessing whether 'agreed purposes' and outcomes had - or had not - been achieved. We did not attempt to attach any significance or priority to particular 'approved purposes' or outcomes; they were each given equal 'weight' in our assessment.

Achievement of 'approved purposes'

- 5.11 Overall, 76% of the selected projects were judged to have 'fully achieved' their approved purposes. In 23% of cases the selected projects were judged to have 'partially achieved' their 'approved purposes' whilst in one case the 'approved purposes' were 'not achieved'.
- 5.12 It is possible that the 'approved purposes' had been fully achieved for some of the cases where the assessment was 'partially achieved', but the assessment was not able to detect this. (For example because the numbers participating in various aspects of the project were not reported, or because one element of the project specified in the application was omitted from the end of grant report). In other cases, though the paperwork did reveal a 'gap' between what had been intended and what

had actually been delivered. The types of deficits identified in relation to the (non) achievement of 'approved purposes' included:

- The project did not engage with one or more groups identified in the application (e.g. school children, students);
- The numbers actually participating in events was lower than had been intended;
- One or more of the elements of the project had not been delivered either at all or in full (sometimes because the project was very ambitious);
- At the time of writing the completion report, the work was still 'in progress';
- There were delays to the project which were outside the organisation's control (e.g. in relation to publicity).

Numbers of outcomes intended and achieved

5.13 As set out earlier, the HLF Outcomes Framework contains 14 outcomes, grouped under three main headings: heritage, people, and communities. The guidance for applying to the Sharing Heritage programme states 'your project must achieve at least one of our outcomes for people' and later states that 'the outcome we value most is that 'people will have learnt about heritage''. In practice, the applications we reviewed aimed to achieve a much larger number of outcomes.

5.14 Table 8 below shows that none of the projects in the selected 100 either intended to, or did achieve only one outcome. Moreover, only three projects in the selected 100 both intended to, and did achieve two outcomes, whilst eight projects intended to, and 22 did achieve, between three and five outcomes. By contrast, almost 9 in 10 (89%) of the applications we reviewed planned to achieve more than six outcomes, and almost three-quarters (74%) actually achieved more than six outcomes. One in seven applications (14%) achieved more than nine outcomes.

Table 8 Overall number of outcomes intended and achieved

Number of outcomes	Intended	Achieved
0	0	1
1	0	0
2	3	3
3-5	8	22
6-8	70	60
9-11	18	14
12-14	1	0
Grand Total	100	100
Average number	7.1	6.2

Achievement of specific outcomes

5.15 Table 9 below shows for each of the 14 outcomes, how many of the 100 selected projects intended to achieve – and how many actually achieved – the outcome in question.

Table 9 Number of projects achieving specific outcomes

Outcome	Intended outcomes (%)	Achieved outcomes (%)
Heritage will be better managed	12	8
Heritage will be in better condition	21	21
Heritage will be better interpreted and explained	91	90
Heritage will be identified/recorded	84	82
People will have developed skills	71	66
People will have learnt about heritage	95	91
People will have changed their attitudes and/or behaviour	40	26
People will have had an enjoyable experience	88	83
People will have volunteered time	87	66
Environmental impacts will be reduced	8	5
More people and a wider range of people will have engaged with heritage	50	42
Your local area/community will be a better place to live, work or visit	43	36
Your local economy will be boosted	12	1
Your organisation will be more resilient	15	8

- 5.16 It can be seen from Table 8 that 95% of projects intended to achieve the outcome that 'people will have learnt about heritage' and 91% of projects were judged to have achieved it. Moreover, a very large majority both planned to and did achieve the outcomes that 'heritage will be better interpreted and explained' (91% and 90% respectively), 'heritage will be identified and recorded' (84% and 82% respectively), and 'people will have had an enjoyable experience' (88% and 83% respectively).
- 5.17 A smaller but still substantial majority also achieved outcomes with regard to developing skills (66%) and volunteering time (66%). The outcomes which were achieved in the smallest numbers of projects were 'your organisation will be more resilient' (8%), 'heritage will be better managed' (8%), 'environmental impacts will be reduced' (5%) and 'your local economy will be boosted' (1%).

Overall achievement of intended outcomes

- 5.18 In 64% of cases, projects were judged on the basis of the completion reports to have 'fully achieved' their intended outcomes. In 35% of cases, projects were judged to have 'partially achieved' their intended outcomes. In the remaining (one) case, the assessment concluded that the project had 'not achieved' its intended outcomes.
- 5.19 As indicated earlier, these figures are likely to under-represent the actual achievement of intended outcomes. Some of the projects allocated to the category 'partially achieved' may in fact have fully achieved their intended outcomes but not reported these in a way that provided evidence and confirmation that this was the case.
- 5.20 Overall, the 'outcomes for people' were achieved more often than either the 'outcomes for heritage' or the 'outcomes for communities'.

Are project assessments undertaken by HLF robust?

- 5.21 We explored the material provided in the 'case papers' compiled by HLF in preparation for the decision making process as follows:
- The distribution of 'scores' (High / Medium / Low) across the three groupings (heritage, people and communities) was examined. This enables a commentary to be developed in relation both to the priority given to each of these components and in relation to the level of the scores which are achieved by funded projects.
 - The assessment in the case papers of projects being High / Medium / Low risk was compared to the analysis we undertook of whether projects did or did not fully achieve their intended outcomes; this offered insight into the extent to which HLF was able to accurately identify higher risk projects.
 - The assessment in the case papers of projects being High / Medium / Low value for money was compared to the analysis we undertook of whether projects did or did not fully achieve their intended outcomes; this provided some commentary on the extent to which the HLF assessment of value for money is linked to the project's actual achievements.
 - The assessment of outcomes as High, Medium or Low for each of the groupings in the case papers was compared with our (binary) assessment of outcomes (achieved, not achieved) based on the application forms and end of grant reports to identify the degree of convergence / divergence between the two approaches.
 - The case papers were read in full to determine whether there were any significant issues which merited being brought to the attention of HLF.
- 5.22 Overall then, the exploration of the case papers was done partly as an independent exercise in itself, and partly in relation to our assessment process as already described above in paras 5.7-5.20.

Limitations of the approach

- 5.23 The main limitation to this approach is that there is no direct 'read across' from the case papers to the assessments which we undertook for the purposes of this research. In particular, as noted above, our assessment of whether specific outcomes were intended and / or achieved used a 'binary' approach, with no weighting given to particular outputs or outcomes. By contrast, the case paper is a wholly qualitative process, using all the information and intelligence available to form a qualitative judgement which reflects the interests and priorities of HLF.
- 5.24 Nevertheless, we can use the analysis based on our assessment process to intelligently 'interrogate' the information in the case papers; to look for 'exceptions' where there seems to be a 'disconnect' between the HLF assessment and ours; and to shed some light on the extent to which the judgements which underpin the case papers stand up to scrutiny.

Outcome Scores in Case Papers

- 5.25 Table 10 shows the outcome scores across the three groupings. The scores confirm the central importance of the people outcomes to the Sharing Heritage programme; 69 of the funded projects were assessed as High in relation to the people outcomes

compared to 40 which were assessed as High in relation to the heritage outcomes and 27 which were assessed as High in relation to communities outcomes. By contrast, very small numbers of projects have an outcome score of Low either in relation to heritage (2) or people (3) outcomes; the number is rather higher (13) in relation to communities outcomes.

Table 10 Outcome Scores in Case Papers

Outcome grouping	High	Medium	Low	No score	Total
Heritage	40	57	2	1	100
People	69	28	3	0	100
Communities	27	53	13	7	100

- 5.26 Overall, 14 of the selected 100 projects scored High in relation to each of the three groupings, and a further 55 projects had a mixture of High and Medium scores across all three groupings. By contrast, 21 of the selected projects did not score High for any of the groupings. In the most extreme cases, three projects (only one of which was located in a Priority Development Area) scored Low on two of the groupings and Medium in relation to the third. This demonstrates the wide variation in the case paper outcomes assessments for funded projects; whilst most funded projects score highly, a small minority did not.

Risk Assessment

- 5.27 Two of the projects were assessed as high risk, 30 as medium risk, and 68 as low risk.
- 5.28 We have examined the extent to which the risk assessment (made in advance of the decision to fund the project), is congruent with our assessment of whether the project fully achieved its intended outcomes. Any 'gap' between our assessment of the intended outcomes (based on the project application) and the achieved outcomes (based on the end of grant report) can be interpreted as (one element of) the level of risk associated with the project, since in cases where a project is high risk it is less likely to achieve its objectives.
- 5.29 Our analysis confirms that the risk assessment undertaken by HLF is robust. Table 11 below shows how the proportion of projects which fully achieve their intended outcomes is inversely related to the level of risk as assessed by HLF. It can be seen that whereas just over half (16/30 or 53%) of the projects assessed as medium risk fully achieve their objectives, almost three-quarters (48/68 or 71%) of those assessed as low risk do. Neither of the (2) high risk projects fully achieved their objectives.

Table 11 Relationship between risk assessment and achievement of intended outcomes

Level of Risk	Number of projects which fully achieve intended outcomes	% of projects which fully achieve intended outcomes	Total number of projects
High Risk	0	0	2
Medium Risk	16	53	30
Low Risk	48	71	68
TOTAL	64	64	100

Value for money

- 5.30 The value for money (vfm) assessment is seen as an overall indicator which summarises all the information in the case paper and combines it into a single measure. Sixty-one projects were assessed in the case papers as offering high value for money, 35 as offering medium value for money and four as offering low value for money. Only one of the four projects offering low value for money is based in a Priority Development Area.
- 5.31 As above, we have examined the relationship between the value for money of a project and the likelihood of it fully achieving its intended outcomes. Table 12 below shows that whereas just over half (19/35 or 54%) of the projects assessed as medium value for money fully achieve their outcomes, two-thirds (41/61 or 67%) of those assessed as high value for money do; this offers some confirmation that the value for money indicator offers some predictive power in relation to the achievement of outcomes. However, the table also shows that all four projects which were assessed to be low value for money fully achieved their outcomes.

Table 12 Relationship between value for money assessment and achievement of intended outcomes

Value for money	Number of projects which fully achieve intended outcomes	% of projects which fully achieve intended outcomes	Total number of projects
High	41	67	61
Medium	19	54	35
Low	4	100	4
TOTAL	64	64	100

- 5.32 The funding of a small number of projects assessed to be low value for money raises the question of whether quality assessments are – or should be – formally benchmarked (for example across regions, or community groups). We return to this point in paras 9.35 - 9.36.

Similarities and differences between alternative assessment processes

- 5.33 We have compared and contrasted the material contained within the case papers with the information and assessments generated through our paper-based exercise using the application forms and end of grant reports. This exercise has highlighted a number of issues for further discussion and consideration.
- 5.34 The two assessments are broadly congruent. In more than two-thirds of cases (69), no narrative comments about the differences between the two assessments were recorded. This provides a good level of reassurance about the robustness of the HLF assessment process.
- 5.35 Where differences were evident, there were three main types of reasons for this. First, in a substantial minority of cases (approximately one-quarter) the case paper assessment appeared to be more optimistic in relation to the achievement of outcomes, and especially the achievement of community outcomes, than the assessment based on the application form and end of grant report. As set out earlier, it could be the case that further examination of the projects (beyond that available from a consideration of the paperwork only) could close this gap. However, it may also indicate more systemic issues relating to the definition and measurement of communities outcomes. This point is returned to in Chapter 9.
- 5.36 Second, this exercise highlighted that in one-quarter (21/87) of the projects where there was an intention to involve volunteers, this was not achieved in practice. This raises the question of how strategically important the focus on volunteering is, and if so how this can best be assessed in advance.
- 5.37 The project which we assessed as achieving no outcomes was assessed as low risk. It might be worthwhile for HLF to look at this project again, to identify whether there were any warning signs that the project would not be delivered.

Summary

- 5.38 The main findings from the review of the 100 selected projects are that:
- Three-quarters of projects (76%) fully achieve their 'agreed purposes' and almost two-thirds of projects (64%) fully achieve their intended outcomes; almost all the remaining projects are judged to have partially achieved their agreed purposes / intended outcomes. Just one project did not achieve any outcomes.
 - Almost all projects (96%) achieve three or more outcomes; a large majority of projects both aim to (89%), and are successful (74%) in achieving, 6 or more outcomes from the HLF Outcomes Framework; and more than 9 in 10 projects (91%) achieve the outcome which is given most weight by HLF 'people will have learnt about heritage'.
 - The outcomes relating to boosting the local economy and reducing negative environmental impacts are rarely intended (12% and 8% respectively) and even more rarely achieved (1% and 5% projects).
 - In general, projects achieved slightly fewer outcomes than originally intended. The average number of intended outcomes was 7.1, whilst the average number of achieved outcomes was 6.2.

- The assessments undertaken by HLF in their case papers appear to be fairly robust, and the risk and value for money assessments are generally congruent with the findings of the independent evaluation. However, there may be a degree of over optimism in the case papers in relation to the achievement of outcomes, especially in relation to communities outcomes.
- In approximately one-quarter of cases, there is a shortfall in the volunteering activity as identified in application forms.

6 Findings: interviews with 35 successful applicants

- 6.1 In consultation with HLF we selected 35 of the 100 projects which had already been reviewed (see Section 5 above) for further examination. We undertook telephone interviews with these organisations; 34 of them had completed a Sharing Heritage project, whilst the final case which we selected had begun, but not completed, a project⁷. Projects were selected using a range of variables in order to create a purposive, but not formally representative, sample.
- 6.2 In particular, our sample of 35 included coverage of:
- All (14) HLF outcomes;
 - All (12) regions;
 - All heritage types (community heritage, historic buildings and monuments, industrial maritime and transport, intangible heritage, land and biodiversity, museums libraries archives and collections);
 - Small, medium, and large grants;
 - All organisation types (church organisation/faith-based group, community/voluntary group, local authority, other public sector);
 - First time applicants as well as those who had previously applied;
 - A range of communities, including LGBT, BAME, and disability groups;
 - HLF Priority Development Areas (PDAs);
 - Projects where our review process had identified questions which required further discussion.
- 6.3 The individual interviewed was generally the key contact as provided by HLF. This was usually the senior staff member in the organisation (where there were staff), or the main volunteer, for example the chairperson, where it was an entirely volunteer run group.
- 6.4 The aim of the telephone interviews was to ‘dig a bit deeper’ in relation to the outcomes achieved by the projects, the impacts and challenges, and to discuss aspects of the projects which were not necessarily fully described in the end of grant reports. The interview topic guide can be found in Appendix 3.

Outcomes

- 6.5 34 out of the 35 projects said they had achieved their intended outcomes, in many cases to a degree that was beyond their expectations. One project was not completed because of unresolved staffing issues, and there were therefore no outcomes achieved in this project. It is notable that this is a higher rate of achievement than that identified in our paper based review of intended and achieved outcomes. We return to this point in Chapter 9.

⁷ This project had submitted an end of grant report, but this was largely incomplete.

- 6.6 We explored with interviewees the extent to which their project had contributed to each of the (14) outcomes identified in the HLF Outcomes Framework. Illustrative responses in relation to each of these outcomes are set out below.

Heritage will be better managed

- 6.7 This outcome tended to apply to projects where either there was a tangible 'output' (such as an artefact or archive), or where the project concerned the conservation of the natural environment, (such as a project based in an organic resource centre).
- 6.8 Respondents gave examples of both 'stand-alone' projects and ones which formed part of a longer term ongoing project. One project which had restored a medieval grave cover drew on support from the local community which committed to a regular programme of maintenance.

"The monument looks better aesthetically, and we are better able to look after it. The History Group plus local residents help with the cleaning on an annual basis."

- 6.9 This comment from a project which had restored a church organ was typical. The project had allowed them to schedule in regular usage of the instrument.

"We've ensured this little piece of heritage is safe for 50 years."

Heritage will be in better condition

- 6.10 A small number of projects saw this as a key outcome. Where interviewees spoke of achieving this, it was usually in the context of restoring a physical structure or archive. At a foreign language university, the archives were now seen as being in better condition and better organised. An environmental project had succeeded in improving the condition of its wildlife habitats.
- 6.11 A herbarium within the Natural History Museum had been uncovered, restored, and made more accessible through digitisation.

"Some specimens hadn't seen the light of day for 50 years. Any which needed conservation work were worked on, for example pest treatment, and loose labels. All were looked at, and are now in good condition."

- 6.12 There were also examples of archives which would have been lost had it not been for the work undertaken under the auspices of the grant.

Heritage will be better interpreted and explained

- 6.13 This outcome was addressed by many projects. Interpretation methods included: 'traditional' signage and information boards (for example in outdoor walking trails); web-based methods and the use of social media; and arts based approaches making use of a variety of art forms.
- 6.14 In a maritime project, the project team described how people were now benefiting from improved explanation of the heritage.

"Prior to this, there was no real understanding of maritime heritage in [town]. Now people are talking about it."

Heritage will be identified / recorded

- 6.15 The majority of projects centred around identifying new heritage. There were also several examples of archives being added to and enhanced. For example, in a project about a major flood in Essex, the local community archive was expanded with additional first hand accounts of the disaster.
- 6.16 Some projects focused on oral history, gathering evidence and first-hand accounts from project participants. In many cases, these were held as new audio or video recordings.

People will have developed skills

- 6.17 Interviewees described a range of skills that had been developed in staff, volunteers, and participants (young and old).
- 6.18 Many organisations were able to describe how their project had strengthened their skills in researching heritage, both through primary research and through investigating existing archives and records. Recording the variety of forms of heritage through audio, video, and written means was common to most projects. This led in turn to improved skills in interpreting the heritage to relevant target audiences. In a project focusing on cultural aspects of water use, volunteers were reported as having developed interpretation and recording skills. In another project working with the Gypsy Traveller community, project participants gained interpretation skills as they developed an exhibition about their heritage. A project that involved children researching local history stimulated by gravestones in the local churchyard helped them develop a range of heritage skills.

"The children learnt how to work the census, learnt recording and research skills, how to use grid references to plot the exact place of the [grave] stones."

- 6.19 Nearly all the projects were very 'hands on', involving the undertaking of practical activities. Interviewees recounted a wide range of practical skills gained by participants through this process. For example, another project which uncovered a previously little known plant archive, led to project volunteers developing their IT skills.

"Some people had never sent an email with a picture of a plant attached!"

- 6.20 As most projects involved dealing with people - staff, volunteers, project participants, and the general public - interviewees emphasised how projects had helped them to develop 'people' skills. These ranged from a generally enhanced ability to relate to people in a public setting, through to specific people management skills.
- 6.21 Self evidently, each project required a set of project management skills to ensure its successful delivery, and several respondents spoke of how these had been developed in the course of the project. One church project described how the experience of delivering the Sharing Heritage project had strengthened their fundraising skills, and contributed to their raising of £56,000 for a new heating system in the church.

"You start small and you get more confident."

People will have learnt about heritage

- 6.22 This outcome has been given the greatest 'weighting' by HLF for this grant programme. HLF hoped that all projects would be able to demonstrate outcomes in this area. This proved to be the case, and all interviewees (except the one which did not complete) identified how people had learnt about heritage as a result of the project.
- 6.23 In a project to restore part of a graveyard and to identify the stories of some of the people buried there, children from the local primary school learnt how to interrogate the census, acquired recording and research skills, and developed skills in using grid references to plot the exact location of the gravestones.
- 6.24 Another project involved primary school children in interviewing a local historian, who was clearly impressed by both the children's knowledge and their interviewing skills.
- "The children learnt enormously - not just those in year 6. There were spin offs throughout the school. [Name] was taken aback at the level of questioning from the children!"
- 6.25 A project exploring the interface between Roma and Scottish culture described how both communities had learnt about the other's heritage.
- "They learnt about heritage - using songs to talk about each other's heritage."
- 6.26 Another project, which focused on the brick making heritage of the area, spoke of how people had learnt from older people who had first-hand knowledge of the industry.
- "This was key. So many villages have no comprehension what the brickfields meant. The old guys told the stories to others. People stood around and chatted, and learnt from the pop-up displays."
- 6.27 A project about how water is viewed and used in different cultures reported that it had had an impact on participants' learning about social customs and the impact on their lives.
- "Participants have come back to us and said 'we've been thinking and become more conscious about how water is used.'"

People will have changed their attitudes and/or behaviour

- 6.28 This outcome was seen as more difficult to achieve, and problematic to evidence. It was not relevant in all cases. By its nature, attitude and / or behaviour change often takes a longer time to achieve than was routinely available through a Sharing Heritage project. (In some cases, projects lasted only a few weeks or months.) Notwithstanding these challenges, roughly half of all the interviewees mentioned a specific attitude or behaviour change which had occurred amongst either the project delivery team or the project participants. Changes in attitude which were described included attitudes to heritage, to particular groups of people, or to local communities.
- 6.29 A museum based project which acquired and publicised a 20th century collage, recounted how attitudes to the museum had changed, with more people now seeing it as an interesting place to visit.

"We attracted people into the museum. About 90% were 'newbies' and there were a couple of BME families. It's rare to get the whole family in. A common response was 'we didn't know you existed'."

- 6.30 There were accounts of how attitudes to particular groups of people in the community had changed.

"Staff realised homeless people were genuinely interested. They're not going to nick things!"

- 6.31 One project which focused on the local mining heritage engaged primary school children and their parents, and brought about a change of heart with regard to their local community.

"Some families changed their attitude to the local area. They saw it as a backwater, but realised it was important nationally and internationally. They had a sense of pride."

People will have had an enjoyable experience

- 6.32 Interviewees frequently spoke of a high 'fun factor' in their projects. Clearly, the vast majority had been enjoyed by participants, project staff and volunteers. This description of how much the participants got out of it was typical.

"It was nice to bring in non Asian people to engage in the workshops. The posters were very glamorous and fascinated people. The girls loved it, especially in [town]."

- 6.33 Identifying what people would enjoy was also an important factor in project design and delivery. For most projects, enjoyment was an integral part of the process.

"Staff gained a better understanding of how to get communities excited. A project about food unlocked heritage, as food is a massive part of their cultures."

People will have volunteered time

- 6.34 Volunteering lay at the heart of most projects, with only three out of 35 saying that no volunteers were involved. There was a high degree of variation in the number of volunteers engaged, and a few cases identified where projects did not succeed in recruiting the anticipated number of volunteers. Small specialised conservation projects might involve only two or three, whereas there were larger scale community arts projects with 60 volunteers. One small, entirely volunteer run, project emphasised this.

"Two volunteers came to learn about the archive - the numbers may not seem much but they're big for us!"

- 6.35 There were examples of both the use of existing volunteers within the group or organisation, and the recruitment of new volunteers specifically for the project. It was clear that the vast majority of projects would simply not have happened without their volunteer workforce. In one project, 12 - 15 new people joined the group and offered their services, with six continuing to volunteer on a bid for a major project.

- 6.36 Volunteer roles were very wide-ranging. These included everything from specialised research and archiving functions, through events facilitation, to routine (but essential) admin support tasks. Invariably, people spoke of how their volunteer team had grown and been strengthened as a result of the project.

Environmental impacts will be reduced

- 6.37 This outcome was generally seen as hard to address within the constraints of a relatively short life project. It was also difficult to evidence, requiring much longer sustained evaluation. However, it was the direct focus for a small minority of projects, usually those concerning the environment or natural heritage. A project focused on the dangers of global warming involved children and their families in planning how to reduce their carbon footprint.

"The message about their carbon footprint was passed on to parents and grandparents. [The project] developed 'Home Packs' which included a quiz measuring the family's carbon footprint. These were completed at home and brought back the following week."

- 6.38 There were also one or two examples of indirect impact on the environment arising from the project. In one case, which focused on the local iron mining heritage, staff were encouraged to car share, thereby reducing carbon emissions.

More people and a wider range of people will have engaged with heritage

- 6.39 Most projects had the ambition of engaging new audiences in their area of heritage. Some were quite small scale, while others involved large numbers. There was also evidence of projects trying to go beyond 'the usual suspects', and engage people who were new to heritage. A regeneration project in a harbour area described this.

"People walk to the harbour. I could see the plaques from the office, and I could see people looking at them. There was an increase in footfall and 'dwell time.'"

- 6.40 One project which had developed a heritage trail throughout the town said the town's heritage had been opened up to an increased number of people.

"The Trust feels more relevant to the mainstream community in [town]. It can be seen as elitist, but it now involves the whole community including those with no roots in the community."

- 6.41 Respondents frequently described how their project had brought their particular heritage to the attention of young people who were often seen as an important new audience. A project about TE Lawrence had involved direct contact between pupils in a school in England and pupils in a Jordanian school. The project manager described the impact on the English young people.

"It changed the attitudes to learning in the young people."

- 6.42 There were also several examples of community groups both leading and participating in the projects as already noted, for example, BAME groups and, disability groups. A project working with homeless people had some positive results.

"It was small steps - the homeless guys going back to Crisis and saying it's OK to go to the museum, bringing their friends along."

- 6.43 A project exploring the Asian community's memories of Bollywood had surprising results.

"The museum said 'we've never seen this many Asian people coming through'."

- 6.44 In a project working with the Roma community, new links had been established between two communities, with practical positive outcomes for project participants.

"There were tensions between the Roma community and [area]. Suddenly you've got 2,000 Roma living next door to you after the A8 accession. People are now earning a living from the band [musicians received payment for performances]. Music goes to both communities - heritage can create a living!"

Your local area / community will be a better place to live, work or visit

- 6.45 Interviewees commonly mentioned how the project had contributed to a sense of local pride in their community. For example, a seaside historical mural project recounted how the creation of the mural had created a real sense of community pride.

- 6.46 For most projects, this outcome was simultaneously a broad aspiration for their work (in that they wished to improve the quality of life in the area), and a difficult area to evidence. Several interviewees mentioned an inter-generational focus in their project, and spoke of the value of people of different ages working together on a project in a local area. This was seen by many as contributing to the quality of life in the community. In a churchyard restoration project, one respondent said:

"We have photos of three to four generations of people all scrubbing the monument!"

Your local economy will be boosted

- 6.47 There were very few examples of this, with people generally seeing this outcome as outwith the scope of their project. Where there were examples, these included: income generation for organisations (through grants and earned income); the intentional use of local suppliers for restoration and renovation work; support for local businesses such as catering suppliers.

- 6.48 A mural project provided some evidence of economic impact.

"It made the local authority realise how important this is. Since the mural they have set aside £75k for community projects (including £39k for the whole sea wall). The seafront has been re-vitalised. Two or three new restaurants have opened and they report that business is good. We attract people not just in summer - they walk the whole length of the wall. The whole area has been regenerated. The mural is the thing that brought everything to life."

Your organisation will be more resilient

- 6.49 Most interviewees felt that their group or organisation had benefited from their Sharing Heritage project, and had become, in effect, more resilient (although the term was rarely used). This process was described in a variety of ways.
- 6.50 Organisations were better known, with a higher media presence. This contributed to reputation and credibility. One museum had raised its profile.
- "The museum got a lot of press - both local and national. The auction was filmed by the BBC in Essex for 'Flog it!'. The [name] artwork was the top attraction. It shows we're pro-active, not an institution that just dusts the exhibits every day."
- 6.51 Partnerships with other organisations had been strengthened, and this often provided important peer support. A health project had worked with a local library, and this led to an important follow up initiative.
- "In December 2014 they allowed us to come into the library to do World AIDS day. We handed out leaflets, and three people came for an HIV test as a result of the leaflets."
- 6.52 For some, the Sharing Heritage project had served as a 'pilot' and led on to further work or projects. A university based project had experienced this, and felt that it had developed its internal capacity.
- "The project was effectively a pilot scheme for the Schools Liaison Team - it beefed up activities in their area. It was a new team working out how it would function. It developed processes for liaising with schools and fostering a good communications network."
- 6.53 Volunteers had been recruited (see paras 6.34 - 6.36 above) which had strengthened the organisation's capacity. Organisations had developed skills to undertake further work in heritage (see paras 6.17 - 6.21 above). Interviewees frequently spoke of how community support had been developed for their organisation, and how this had led to enhanced credibility, status, and resilience.
- 6.54 More generally, respondents described an enhanced capacity within their own organisation. This included: the ability to recruit volunteers; personal and professional development of staff; evidence and learning from a pilot project; improved relationships with partner organisations. In one or two cases, they felt that capacity had also been built within partner organisations. An environmental project which had worked with teachers said:
- "It's important to make teachers more confident, rather than relying on an external organisation. Teacher training is key."
- 6.55 Another aspect of increased resilience was an improved capacity to generate income (both from HLF and from other sources).

Other outcomes

- 6.56 Interviewees were asked if the project had led to any unanticipated outcomes. Most expressed surprise at the level of success that they had managed to achieve, and how this had in turn generated support and interest locally.

The application process

Reasons for applying to Sharing Heritage

- 6.57 We asked interviewees to say why they had applied to the Sharing Heritage fund. Most described a 'fit' with what they wanted to achieve. There were also several examples of arts organisations wanting to 'get into' heritage, and the fund offered a route to achieve this.
- 6.58 Most organisations were already aware of HLF and the Sharing Heritage programme, and this prior awareness led, in several cases, to discussion with HLF staff before submission.
- 6.59 In a couple of cases, recommendations had been received from other funders to apply to Sharing Heritage. Sharing Heritage seemed to be the only potential source of funding for a small subset of projects, for example funding for repairs to a clock tower. Another project was looking for money for restoration activities in a graveyard, which they were keen to undertake but for which they were struggling to find funding.

"We were at a funding event at the local rugby club, and we asked every funder about churchyards. They all said HLF!"

Use of the HLF Outcomes Framework

- 6.60 Interviewees were asked about the extent to which the HLF Outcomes Framework had been useful in designing and delivering their project. The overwhelming majority found it a useful frame of reference, and reiterated that the perceived 'fit' with their project was the trigger for the application. Some described this as a synergy.
- 6.61 The framework was rarely used as a formal tool to shape the project, while the specific use of different outcomes varied according to the project. In particular, it created a helpful focus on heritage for 'non-heritage' organisations. This was true for a music based project.

"They fitted well with the project we had in mind. They made sure heritage rather than music was at the core. Music was the tool not the purpose. We didn't have to shoehorn anything in."

- 6.62 A similar experience was had by a project working with Gypsy Travellers.

"It helped us focus more on heritage. It was a richer experience than for example simply being an 'integration' project."

- 6.63 For two organisations, it led them to involve volunteers. One of them said:

"It meant we made more of the intention to have volunteers and the community. This led to it being a stronger project."

- 6.64 Two organisations described how it helped create a sense of accountability and focus.

"The discipline of the having the HLF outcomes was very helpful. It kept us on track in a remarkable way."

"It gave it rigour and focus. It was helpful to think about the three areas. We're doing a lot in communities all the time, but heritage and people structured our thinking."

The process

- 6.65 We enquired how effective and accessible the grant application process had been. This covered contact with HLF staff, pre-application information, the application itself, the grant award, and the production of the final report.

- 6.66 The overwhelming majority were positive about the grant process, typically describing it as 'straightforward and helpful'. They particularly appreciated the personal contact with grants officers in the course of the application process. This comment was typical.

"Of all the funders, HLF is the most helpful. They were always available and a good sounding board."

- 6.67 Several commented positively on the 'Expression of Interest' (EOI) process (although most realised that this stage had since been removed). The EOI gave them an opportunity to get feedback on their project idea, and in particular to correct any 'imbalance' in their application, for example between music and heritage. A BAME group looking at cultural heritage through Bollywood movies had found the EOI process useful.

"The EOI form helped us to be more focused. It seemed too much to do. The response from HLF was we need to be more focused. This helped us concentrate on poster art."

- 6.68 Three respondents mentioned minor technical problems with the auto-calculation on the report form, although these seemed to have been resolved by HLF staff.

- 6.69 A few mentioned they would have liked personal contact with HLF at the conclusion of project. This would have been an opportunity for HLF to say 'well done' and for the project to recognise that it had complied with what was required of them.

- 6.70 We asked how interviewees felt about the lack of a requirement to report against the specific outcomes they had identified in their application form. There was no consensus on this. One organisation saw benefits to the reporting process becoming more outcome focused.

"They [HLF] were more rigorous on the money rather than the outcomes. I'd rather demonstrate the outcomes, rather than photocopy every receipt."

- 6.71 Another recognised the value of using both formal and less formal approaches to reporting, pointing out that the HLF requirement was not as clear as it could be.

"It's helpful if funders are clear what they want. It would be right to ask for outcomes to be reported against, but people want to hear anecdotes. Make room for both."

Suggested improvements

- 6.72 There were very few suggested improvements, suggesting broad satisfaction with the overall grant making process. One project proposed some form of 'aftercare' at the project end.

"After we'd done the project and provided the DVDs and the booklet, we expected someone to come back and say 'Wow that was a good project!', but there was silence. This was the only aspect where the aftercare could have been better."

- 6.73 Other suggestions included:

- Making samples of completed forms available to applicants to act as good practice guidelines;
- Making it possible to upload photos to HLF as part of the final reporting process⁸;
- Applying by means of an interview (rather than a form), where language is an issue.

"Some BME groups might find it terrifying. The language needs to be more accessible. Local community groups come to us with questions. Things don't always fit under the budget headings. They don't understand the nature of the questions. They need support."

Sustainability

- 6.74 We asked interviewees about the extent to which their project was sustainable in the short, medium, and long term, and about the kind of legacy left by the project. All respondents, except one (where the project was not completed) described some form of sustainability or legacy. The unifying theme was the confidence boost that the project had provided for people in the organisation. This had significantly increased people's commitment to and motivation to continue being involved in heritage work - a key aspect of sustainability.

"It gave us a shot in the arm. It makes other work more sustainable - more people in the village know about its heritage."

"We've more confidence to train other people - the project has enabled us to do this."

"The biggest thing is confidence. You do one project well and it gives you the confidence to start looking for partners. You learn something new, gain experience."

⁸ In fact this facility is currently available.

"It's given us a new lease of life. It was refreshing to have the training. The whole way it works is so much smoother. And it looks better - displayed in museum standard cases. It's energised and motivated us to do more."

- 6.75 In the short term, most projects cited the availability of information about their project (including digitised archives) being available on the organisation's website. This was also seen as long term sustainability, with the digital record being available 'in perpetuity'.

"The sustainability lies in the concrete items - the display in the church, the material on the website. The other things were more transient by nature."

- 6.76 As described above (paras 6.49 to 6.55), medium term sustainability was delivered through the enhancement of organisational capacity, which increased their resilience.
- 6.77 In the longer term, there were tangible examples of where the grant had facilitated and ensured the repair or reinstatement of a physical artefact, and the creation of (or improvement to) archives. These were seen as an important gift to posterity.

Lessons learnt

- 6.78 There were a number of 'process' lessons which projects felt they had learnt. These included: how to manage the application process; the importance of planning; certain project management skills; and the importance of relationships with external partners.
- 6.79 There were no significant suggestions as to how things should be done differently. When asked if there was anything they would like to feed back to HLF, most interviewees said 'thanks' to HLF. This comment was typical.

"Perfectly happy and delighted with what happened."

Summary

- 6.80 The key findings from the telephone interviews are that:
- While there is evidence of projects contributing to all 14 outcomes comprising the HLF strategic framework, the greatest focus of projects is on learning about heritage, interpreting heritage, the development of skills, and the use of volunteers. The importance of people enjoying the heritage experience is also central.
 - Organisations and groups delivering projects have developed increased confidence to develop and deliver heritage projects. This is particularly true for small volunteer-led community groups (with no paid staff). Organisational resilience has been enhanced through having an increased organisational profile, strengthened relationships with partner organisations, the recruitment of volunteers, and increased income.
 - The application process is seen as straightforward and manageable, and provides a good 'fit' with the capabilities of the organisations who apply. Direct contact with HLF staff is much appreciated. The Outcomes Framework is

viewed as a helpful guide (particularly for non-heritage organisations), rather than as a formal requirement.

- There is evidence of some enduring sustainability or legacy for most projects in either the short, medium, or long term - in terms of the availability of project outputs, and the enhanced resilience of the organisation.

7 Findings: interviews with 15 unsuccessful applicants

- 7.1 In consultation with HLF we selected 15 applicants who had made unsuccessful applications to the Sharing Heritage programme for further examination. Projects were selected to create a purposive, but not formally representative, sample.
- 7.2 The sample included first time applicants (as well as experienced organisations), together with a range of heritage types, organisation types and regions. The sample was also constructed to include: organisations who had applied unsuccessfully to the Sharing Heritage grants programme on one occasion only; organisations who had been unsuccessful in applying on more than one occasion; and organisations who had had a mixed experience with both successful and unsuccessful applications (sometimes relating to the same project) submitted.
- 7.3 We undertook telephone interviews with these organisations. The main areas covered in these telephone interviews were: awareness and understanding of the Sharing Heritage programme, and especially of the HLF Outcomes Framework; experience of the application process; and subsequent development of the project. The interview topic guide can be found in Appendix 3.
- 7.4 We also examined the case papers for these applications.

Awareness and understanding of the Sharing Heritage programme

- 7.5 All respondents had some awareness and understanding of the HLF Sharing Heritage Programme, and in particular of the HLF Outcomes Framework. However, the levels of knowledge and awareness varied considerably.
- 7.6 For more established organisations with paid staff, the role of the interviewee often included specific responsibilities for fundraising. The Sharing Heritage programme was highly valued by these organisations, as it was seen as a relatively open programme, with scope to address a wide range of projects. Amongst these organisations there was a high level of understanding about the requirements of funders in general as well as a specific appreciation of the requirements of HLF. Respondents were very familiar with the details of the HLF Outcomes Framework, had often applied to the Sharing Heritage Programme on more than one occasion, and had a strong sense of the kinds of projects that HLF wished to fund.
- “We are very tuned in to HLF Outcomes Framework and we are used to working with that. We have systems and protocols in place for the evaluation aspects.”
- “HLF are clearer than other funders about what they are trying to achieve. The HLF Outcomes Framework is very helpful.”
- 7.7 Smaller organisations, including those with no paid staff were also aware of the HLF Outcomes Framework. For some, especially for volunteer-led organisations (with no paid staff), the familiarity was at a very general level, and focused simply on an appreciation that any project which wanted to “share heritage” was within the scope of the programme. Some of these respondents did not distinguish the heritage, people, and communities aspects of the HLF Outcomes Framework. Others made

more specific points, particularly commenting on the good 'fit' between their proposed project and the HLF Outcomes Framework.

“Yes, we read up on this and thought our project fitted well. Particularly with the people outcomes. We were really focused on people learning and having a good time.”

- 7.8 One respondent who had been involved with a number of both successful and unsuccessful applications over many years, thought that HLF needed to be more strategic in deciding itself which projects were worthy of funding, and which were not. He thought the HLF Outcomes Framework was something that the organisation could “hide behind” and he felt many of the individual outcomes specified in the framework were unrealistic.

“I think the idea of the Outcomes Framework is just plain wrong. I think it is dishonest, as people try to fit their projects to HLF criteria, often disguising the true nature of what they want to do. Some of the elements of the framework are silly - 'change attitudes and behaviour', 'reduce environmental impacts'. How can a small project do this?”

Experience of the application process

- 7.9 The application process was commented on by all respondents. The experiences which respondents related ranged from the essentially positive (despite the rejection of the project), to the mixed (with both positive and negative elements commented on by respondents) to the almost completely negative. However, even in the most negative of accounts, there was appreciation to some degree of the efforts of HLF staff.
- 7.10 Not all small, volunteer-led organisations (with no paid staff) reported negative experiences of the application process. However, the most negative experiences were concentrated within these types of organisations, especially within organisations staffed by passionate and enthusiastic individuals with a lifelong interest in a specific aspect of heritage, where there is limited capacity to engage with and respond to external funding opportunities.
- 7.11 The main aspects of the application process which attracted comment were: the contact and interaction with HLF staff; completing the application form; the feedback on the reasons why projects were not funded. These are discussed in turn below.

Contact and interaction with HLF staff

- 7.12 There was wide ranging positive comment about the expertise and availability of HLF staff. Where HLF staff had visited in advance of an application being submitted, this was universally seen as helpful.

“The HLF Grants Officer came out to meet me and we had detailed discussions. This was very helpful.”

“This was a useful visit – I was not warned off applying for funds.”

- 7.13 More generally, respondents talked about the responsiveness of HLF staff to requests for advice, or for a visit. In two cases, there were quite profound relationships established where there was communication on an ongoing basis in relation to a whole raft of potential projects.

“I have built very strong relationships with HLF staff in [Name of Office]. They come to openings, give good support and advice. It is quite a personal connection.”

- 7.14 Only one respondent specifically criticised HLF staff for not being available to visit the project and to discuss it face-to-face.

“HLF didn’t understand our project. They didn’t visit us or find out about it.”

Completing the application form

- 7.15 On the whole, the application form was seen as quite straightforward to complete, and not particularly time consuming. Organisations with paid staff, in particular, commented that the application form was easier than those required by other potential grant funders.
- 7.16 However, for the small subset of respondents who found the overall application process to be negative, completing the application form was highlighted as a source of difficulty. At one end of the spectrum comments were made that the application form was ‘a bit tricky’ or ‘a bit frustrating’. However, in the (three) more extreme cases the form was described as ‘dreadful’ or ‘excruciating’; these comments came from respondents who were not familiar with form filling, particularly in the context of electronic forms. It was suggested that a face-to-face assessment process would make the programme more accessible for these organisations.

Feedback on the reasons why the project was not funded

- 7.17 Feedback on the reasons why the project was not funded was the aspect of the application process which attracted most criticism. The timescales for feedback were sometimes criticised for being too long; and in a few cases respondents could not remember receiving any feedback letter or phone call at all.⁹
- 7.18 As reported by the respondents, the reason given for not funding the application was often of a highly general nature i.e. ‘there were stronger projects submitted at the same meeting, which offered better value for money’. Whilst some applicants – especially those from organisations with paid staff - took a philosophical view, and accepted this explanation, others were very dissatisfied. The dissatisfaction related to the absence of any specific reasons for why the project had not been successful.
- 7.19 More significantly, the criticisms related to the sense applicants had that the project had been discussed with the Grants Officer, and that the full application had fully dealt with the points raised at the Expression of Interest¹⁰ stage. They simply did not understand why the project had therefore not been funded.

“We asked for a meeting with HLF. A lady came down from [Name]. Her explanation was that HLF did not want to fund a website and also couldn't fund a project that had already started. We were pretty upset because we had

⁹ Given that the HLF grant process includes a requirement for written communication following the decision making, it is likely that these cases are accounted for by the length of time between the application process and this telephone interview. This has probably resulted in the memories of interviewees being incomplete.

¹⁰ Note that the Expression of Interest stage was removed from the HLF Sharing Heritage grants process in 2013.

been given feedback at EOI stage (to look at Oral History website, to talk to specific groups etc.) which we felt we had followed to the letter. We were told that 'other bids were stronger'."

"We took the HLF framework very seriously. We did our homework and implemented the advice from the EOI stage. We were surprised we were not funded. The feedback wasn't very helpful."

"They need more consistency between EOI and the full application."

- 7.20 As might be expected, those who were subsequently successful after resubmitting their proposal were very happy with the feedback they received and the positive encouragement they were given to resubmit.

"The Grants Officer was very good. Unlike other funders. The honest feedback [that the project as originally submitted was too ambitious] was very helpful."

Subsequent development of the project

- 7.21 Respondents were asked whether the project had been developed further following the unsuccessful application to HLF. In five cases, nothing further had been done. In two cases respondents explained that they were about to start discussions about how to progress the project. In the remaining eight cases there had been progress of some kind in pursuing the project.

- 7.22 Of these latter cases, one project had achieved external funding from an alternative source, one had successfully resubmitted the project to the Sharing Heritage programme following advice from HLF staff, one organisation had used the experience of the unsuccessful application to restructure their organisation, and five projects had delivered some aspects of the project, albeit on a more limited basis and at a slower pace than would have been the case with the HLF funding.

"We realised our organisation was not really fit for purpose. We are setting up a new organisation with a better infrastructure – 8 trustees and 8 committee members. That should mean we can apply for grants."

"We kept going. We are delivering it piece by piece."

"We are doing it slowly. It's much more satisfying to do it like that rather than with funding from HLF".

Other Comments

- 7.23 Those who found the experience of applying to Sharing Heritage programme negative, were clear that they would not approach the programme again in the future.

"They wouldn't fund us. They don't think we are original. We are too English. Too white."

"This was an entirely negative process. I wouldn't go there again."

- 7.24 There were very few specific suggestions for improvements to the programme. One respondent suggested that details of all funded projects should be published so that potential applicants could get a better understanding of what types of projects the

programme was aimed at. (This respondent acknowledged that this process might already be in place, although she was not aware of it.) Another suggested that it would be helpful for HLF to consider making partial awards, if the project was not recommended for funding in its entirety.

- 7.25 Two respondents who had applications rejected were fulsome in their praise for the Sharing Heritage programme.

“We love the Sharing Heritage Programme. It is fantastic.”

“The Sharing Heritage programme is excellent.”

Case Papers

- 7.26 The case papers for the 15 unsuccessful applications were examined. As would be expected, the case paper assessments of the outcomes, the risks, and the value for money were – in aggregate terms – much less favourable than for the projects which attracted funding (described in Chapter 5 above).

- 7.27 However, in three of the 15 cases, the case paper assessments were very positive. In these three cases, both the value for money of the projects overall, and the ‘people outcomes’ were assessed to be high. One of these three projects scored high for its ‘heritage outcomes’ (the other two scored medium) and one scored high for its ‘communities outcomes’ (the other two scored medium). Two of these three projects were assessed as low risk and one as medium risk. One of them was in a Priority Development area. None of these three cases was negative about the application process. In one of these three cases, the project was successfully resubmitted, in a second case the organisation was subsequently successful in attracting funding for a different project, and in the third case no further action was taken.

Summary

- 7.28 The main findings from the telephone interviews with unsuccessful interviews are that:
- Those who are unsuccessful in their applications have an awareness of the Sharing Heritage programme and specifically of the HLF Outcomes Framework. More established organisations have a more in-depth understanding of the details of the framework.
 - A minority of those whose projects are unsuccessful are negative about the application process and the Sharing Heritage programme. Whilst not all volunteer-led organisations (with no paid staff) are negative about their experience, negative views are concentrated within this sector.
 - The input of HLF staff is valued and appreciated by those who submit applications which are not successful.
 - The aspect of the process which receives most criticism relates to the feedback to unsuccessful applicants; this is particularly the case for applications which went through an Expression of Interest stage and where applicants felt they had followed the advice they were given to the letter.
 - In around half the cases no further development of the project has taken place since the application was unsuccessful; however in the other half of cases the

project has been progressed, often at a slower pace or in a slightly different form.

- Overall, the case paper assessments of the unsuccessful projects were much less favourable than for the projects which attracted funding. However, the case paper assessments for three of the 15 unsuccessful applications was very positive; two of the three organisations went on to receive a Sharing Heritage grant (one for a resubmitted version of the same project, and one for a different project).

8 Findings: 10 case studies

8.1 In consultation with HLF we selected ten projects which had already undergone a desk based assessment and a telephone interview, for a case study visit. An overview of the findings is set out below. Detailed accounts of each of the case studies is attached at Appendix 2.

Selection of case studies

8.2 In choosing the projects for a case study visit, we adopted a purposive approach. In particular we ensured that the selection included:

- Projects from across the UK;
- A range of heritage types (community heritage, intangible heritage, land and biodiversity, industrial maritime & transport);
- Large, medium and small grants;
- Representation from a wider range of communities, especially BAME groups.

8.3 Given the investment of time and resource involved in conducting case study visits, we avoided simple or one-dimensional projects. Rather we focused on selecting projects which were complex. This complexity could relate to the issues the project was attempting to address, the context (organisational, cultural, financial) in which the project was operating, the partnership arrangements, the multiple and diverse communities involved, the delivery mechanisms and so on. The topic guide for the case study visits can be found in Appendix 3.

8.4 Note that nine of the ten projects were led by community / voluntary organisations; the tenth was classified as 'other public sector'. This reflected the strong focus on community and voluntary organisations which HLF wished to achieve through this research. Moreover, eight of the ten projects came from first time applicants. Again, this reflected HLF's particular interest in understanding the needs of this group.

Who we spoke to

8.5 During the case study visits, which lasted between a half day and a whole day, we spoke with a total of 88 individuals (the largest group being 15, and the smallest 4). These individuals included:

- Project managers
- Project staff
- Volunteers
- Committee members
- Partner organisations
- Project participants / beneficiaries.

8.6 Although we were able to speak to project participants / beneficiaries in some cases, this grouping was least well represented. This was mainly due to the time elapsed since project completion, which made it difficult to locate specific individuals who had been involved. In several cases we interviewed someone who could speak knowledgeably on their behalf (for example a teacher describing the experience of pupils from a previous class which had participated in the project).

The 10 case studies

8.7 Table 13 below provides a summary of the main characteristics of the ten case studies.

Table 13 Ten case studies

Project	Region	Heritage area	Organisation type	Grant	PDA	First time applicant
'Web of water' Artcore	East Midlands	Intangible heritage	Community/voluntary	£10,000	Yes	Yes
'Educational mural on 1953 flood' Friends of Concord Beach	East of England	Community heritage	Community/voluntary	£10,000	Yes	Yes
'Oscar Wilde and Reading Gaol' Reading University	South East	Museums	Other public sector	£4,300	No	Yes
'Carbon Busters' Crichton Carbon Centre	Scotland	Intangible heritage	Community/voluntary	£10,000	Yes	Yes
'Roma and Scottish heritage' conFAB	Scotland	Community heritage	Community/voluntary	£9,000	No	Yes
'Music and museums' Oxford Concert Party	South East	Intangible heritage	Community/voluntary	£7,700	No	Yes
'Introducing water for life' Earth Trust	South East	Land and biodiversity	Community/voluntary	£9,200	No	No
'Clay trails sensory guide' Sensory Trust	South West	Community heritage	Community/voluntary	£10,000	No	Yes
'Promotion of Charterhouse Returns' Charterhouse Returns Trust	Wales	Industrial maritime & transport	Community/voluntary	£7,800	No	No
'Not lost but gone before' Kirkbymoorside History Group	Yorkshire and The Humber	Community heritage	Community/voluntary	£6,600	No	Yes

Outcomes

8.8 Overall, there was considerable evidence provided by projects and their partners of the achievement of HLF outcomes. In most cases this applied to multiple outcomes. Projects were able to demonstrate progress across all three outcome areas.

- 8.9 The evidence provided during the case study visits was, by and large, qualitative in nature. Individuals shared their views, attitudes, opinions and assessments of what the project had achieved.

Outcomes for heritage

- 8.10 All projects included an element of interpretation and explanation, whether natural heritage (Earth Trust, Crighton Carbon Centre), cultural heritage (conFAB), or historical heritage (Reading University, Charterhouse Returns). There were examples of heritage being in better condition (Kirkbymoorside). Also, heritage was identified and recorded (Reading University), often making use of digital approaches.
- 8.11 Overall, projects displayed a significant sense of pride in their contribution to the heritage they had chosen to highlight. This was true of large institutions as well as smaller community groups.

Outcomes for people

- 8.12 Projects varied dramatically in size and scope, and as a result the number of beneficiaries also varied. There were some quite small projects (Oxford Concert Party), with others involving hundreds of participants (Artcore, Crighton Carbon Centre).
- 8.13 All the projects visited were able to provide clear examples of learning about heritage. This applied to project participants, beneficiaries and volunteers, but also to those delivering the project. A keenly felt passion for their particular type of heritage did not preclude them learning something new about it.
- 8.14 Most case study projects were able to provide evidence of attitude change to the heritage they focused on. This embraced attitudes to water use (Artcore) through to the way that the Roma community saw itself within Glasgow (conFAB).
- 8.15 All of the projects made use of volunteers to some extent, but the depth and intensity of volunteer involvement varied considerably. A project based in a major academic institution (Reading University) relied primarily on paid professional staff with a handful of volunteers involved. Projects that were located within smaller community organisations or groups frequently relied on volunteers completely (Friends of Concord Beach, Charterhouse Returns, Kirkbymoorside). The Sharing Heritage grant programme seemed to be of particular value to small volunteer-led organisations (with no paid staff).

Outcomes for communities

- 8.16 The case study visits provided an opportunity to explore in more detail the extent to which projects had effectively extended and diversified their audiences. A lot of evidence was gathered from partner organisations, who frequently backed up projects' assertions that a wider range of people had been involved. Nearly all the projects had attracted significant numbers of participants - to workshops (Artcore, Crighton Carbon Centre, Earth Trust), to events, performances, and exhibitions (Reading University, conFAB), and to informal viewings (Friends of Concord Beach).
- 8.17 In several cases, schools had been engaged (Crighton Carbon Centre, Artcore, Earth Trust, Reading University) and this had proved fruitful. For some projects this represented the continuation of existing relationships. For others, it was a major

departure, breaking new ground, leaving their 'comfort zone', and extending their skillsets (Kirkbymoorside).

- 8.18 Work with young people sometimes extended into what could be described as 'inter-generational' work, with adults working and learning together and from each other. This was true in Kirkbymoorside and Charterhouse Returns. The heritage provided the social 'glue' to cement the relationships between sections of the community who might otherwise never have met.
- 8.19 There was evidence that organisations were able to engage with a wider range of communities. This included: people with disabilities (Sensory Trust); the migrant community (conFAB); the Black, Asian, and minority ethnic (BAME) community (Artcore); and people who were homeless (Oxford Concert Party). In each case, credibility and trust within the 'target' community was a pre-requisite for successful delivery of the project. Sometimes this came from already having an established track record in the field (Sensory Trust, Artcore). In other cases, judicious use of partnership working with specialist organisations was the key (Oxford Concert Party).
- 8.20 Some projects successfully managed to work in recognised areas of urban deprivation. These included areas of Derby (Artcore) and Glasgow (conFAB) with significant incoming migrant communities, as well as a deprived area of Essex (Friends of Concord Beach). In their own small way, projects in these cases were seen as contributing to the regeneration of the local community. Comments from third party organisations confirmed this.
- 8.21 Most projects were able to demonstrate increased organisation resilience. There were also many examples of the local community being a better place to live (Artcore, Charterhouse Returns).

Partnerships

- 8.22 In all of the case studies, the use of partnerships with other organisations was central to the successful delivery of the project. Partnerships brought a number of advantages:
- Credibility with the anticipated target group: this was an important foundation for each project. Sometimes this involved a specialist organisation that worked with a particular community, for example the use of Roma consultants in a community development organisation (conFAB). On other occasions, it was the connection to a school which provided a vital link with the children (Kirkbymoorside, Crighton Carbon Centre).
 - Specialist skills: sometimes when the lead organisation was not a heritage organisation, these specialist skills were accessed through the relevant partner (Oxford Concert Party, Friends of Concord Beach).
 - Enhanced capacity: particularly for smaller organisations, one key advantage of partnering with another organisation or group was 'strength in numbers'. This was true of conFAB and Friends of Concord Beach, where additional committed staff or volunteers from a partner meant the difference between having sufficient capacity or not.
- 8.23 More than half of the case study projects we visited employed partnerships with schools. There was evidence that this had both strategic and operational dimensions. For some (Reading, Crighton Carbon Centre), this was part of a planned programme

of activities - with a clear longer term agenda (widening higher education participation, or developing schools commitment to environmental education). For others (Kirkbymoorside), it was more pragmatic - developing a local project. The ability to engage schools, often in new ways, was a striking feature of the projects.

- 8.24 Most partnerships were with either public or third sector bodies. However, there was some evidence that interesting links had been developed with some private sector organisations. This ranged from local trades-people and businesses (Friends of Concord Beach, Kirkbymoorside) to city centre music clubs (conFAB) and major leisure organisations (Charterhouse Returns).

Capacity building

- 8.25 While the prime purpose of the Sharing Heritage grant was the delivery of a heritage project, a significant and frequent outcome for the lead organisation was the strengthening of its own capacity - especially its ability to engage in heritage work. In HLF terminology this is referred to 'organisational resilience'. Nearly all the case study projects reported this, and were supported by comments made by partners. Indeed, one of the most striking aspects of the case study visits was the insights gained into how projects had strengthened the resilience of the host organisations, and built their capacity.
- 8.26 Underpinning this resilience was a growth in organisational self confidence as a result of having delivered a project that was perceived as being successful. This led on to an improved ability to raise funds for the work. Several organisations and groups (Oxford Concert Party, conFAB, Artcore, Kirkbymoorside) had successfully applied for further funding for heritage projects as a direct result of the learning from the initial Sharing Heritage project. Indeed, some had seen the Sharing Heritage project as a pilot or testbed, and these had in turn acted as something of a catalyst (Charterhouse Returns, conFAB) for the eventual larger scale venture.
- 8.27 Part of the strengthened confidence and capacity was a willingness to reach out to new markets and audiences. This 'outreach' function enabled projects to enter other people's 'territory' on more equal terms (Oxford Concert Party).

Sustainability and legacy

- 8.28 All the case studies provided evidence of some degree of sustainability. This aspect of the project was taken seriously by the organisations, who were keen to demonstrate that their project had led on to something else. Partners were very positive about this, and frequently confirmed that, even though the project lasted for a maximum of a year, a legacy endured. This was seen in: the heritage being available to the public (in both physical and virtual formats); the follow up activity which had been generated; the new projects which had been spawned; and the enhanced capacity of the organisations themselves.
- 8.29 Considering that the focus of the grant programme was 'heritage', projects had succeeded in making waves across a wide range of policy and topic areas. These included education (Reading University), the arts (Oxford Concert Party), regeneration (Charterhouse Returns), social inclusion (Sensory Trust), and the environment (Earth Trust). This in turn helped to provide credibility to new partners and funders.
- 8.30 A particular feature of some of the projects hosted by smaller community groups was just how much impact a relatively small grant could have. The Sharing Heritage grant

seemed to have a disproportionate value for small volunteer-led community organisations (with no paid staff), enabling them to mobilise community resources and generate a lot of community activity (Friends of Concord Beach, Kirkbymoorside).

- 8.31 In several cases, the Sharing Heritage project was championed by one committed individual. Very often he or she would be part of a team, but from the discussions we held on the visits, it was clear that this leadership and coordination function was integral to the success of the project. Where this was in the context of an entirely volunteer-run project, a disproportionate weight was often borne by one individual.

Summary

8.32 The key findings from the case studies are that:

- The projects operate in highly specific local contexts. They have all been able to 'work with the grain' of this local context and to maximise opportunities for development, learning and sharing.
- Projects and partner organisations were able to provide substantial evidence that HLF outcomes had been achieved, with all projects achieving multiple outcomes.
- Volunteers play a role in the majority of projects, but are especially important in small, community-based projects where the leadership function is taken by a volunteer. There is sometimes a risk of overload on this key individual in these cases.
- There are examples of practice which describe tools and tips for engaging particular community groups with heritage for the first time.
- Partnership working with a wide range of public, private, and third partners is key to making an impact and to leaving a sustainable legacy. Again, there are useful models of practice.
- The process of delivering the Sharing Heritage project enhances the organisational self confidence and credibility of the host organisation. In many cases this had led on to the development and delivery of further heritage projects.

9 Discussion

- 9.1 In this chapter we draw on all the material which has been collected during the course of the evaluation, to discuss the findings in relation to each of the (four) evaluation aims set out in Chapter 2. We then go on to discuss a range of other issues which have been prompted by our research.

Evaluation Aim 1

To establish the extent to which the outcomes in the current strategic framework are being achieved by the programme

- 9.2 The HLF strategic framework sets out 14 outcomes, in three broad groupings (heritage, people, communities), which guide the work and specifically the investment decisions, of the organisation. The framework includes outcomes which are specific to the heritage field (e.g. 'heritage will be better managed') as well as outcomes which focus more broadly on building social, cultural and economic capital (e.g. 'people will have developed skills', 'your local area / community will be a better place to live, work or visit'). HLF requires, as a minimum, that projects applying to the fund meet one outcome from the 'people' grouping, with the greatest priority being given to 'people will have learnt about heritage'.
- 9.3 Any discussion about achievement of outcomes within a small grants programme needs something of a 'health warning'. Accurate assessment requires both clear statements of the anticipated changes to be brought about by the project, and appropriate 'tools' for measuring this. Unsurprisingly, given the nature and size of most of the applicant organisations and groups, these conditions were not always met. However, our iterative approach to data collection, which allowed us to interrogate a range of projects in detail, has enabled us to develop a fairly robust assessment of the extent to which the Sharing Heritage programme has been successful in achieving intended outcomes.
- 9.4 We found that there was a strong relationship between the outcomes that projects intended to achieve and the outcomes that were actually achieved. Based on our initial paper-based examination of (100) completed projects, we found that around two-thirds of the projects 'fully achieved' their intended outcomes, and almost all other projects 'partially achieved' their intended outcomes. Moreover, as we examined projects in greater detail, through our telephone interviews and case studies, we found more evidence that intended outcomes had been achieved. In addition, the case studies (which were selected not to be representative, but to illustrate some of the most complex and multi-faceted projects) were often revealed to have achieved outcomes which the paperwork had not indicated were intended.
- 9.5 The HLF focus on 'people should learn about heritage' as the outcome which was valued most, was strongly reflected in funded projects. More than 90% of projects were able to demonstrate in the end of grant reports that this had been achieved.
- 9.6 Other outcomes ('heritage will be better interpreted / explained', 'heritage will be identified / recorded' and 'people will have had an enjoyable experience') were also achieved in more than 80% of projects. By contrast, only a small minority of projects could demonstrate achievement of 'environmental impacts will be reduced' (5%), or 'your local economy will be boosted' (1%).

- 9.7 Our analysis also showed that none of the applicants to the programme aimed to achieve only 1 or 2 outcomes from the framework. Indeed a large majority both aimed to (89%), and did (74%), achieve more than 6 outcomes.
- 9.8 Our assessment of the evidence in relation to the outcome ‘people will have volunteered time’ revealed that for some projects there was a shortfall in the numbers of volunteers actually involved, as compared to the numbers it was intended to involve. Specifically, substantial shortfalls in the number of volunteers involved was detected in one-quarter (21/87) of the projects where the numbers expected to be involved were explicitly set out in the application form.
- 9.9 The outcome ‘your organisation will be more resilient’ was assessed as having been achieved in just 8% of cases in the paper based assessment. However, this low level appears to be a consequence of the terminology, which was not familiar to, or used by many of the organisations applying to the Sharing Heritage programme. When we undertook telephone interviews and case studies we found there were substantially higher levels of achievement in relation to this dimension of the Outcomes Framework.
- 9.10 These findings prompt a number of questions both in relation to the Outcomes Framework itself, and how it is applied in practice. First, should HLF be more ambitious in its guidance in terms of what it expects projects to achieve? At present, the guidance explains that the achievement of a single outcome (learning about heritage) is sufficient. Given the findings, there is scope to set a higher minimum than this. Second, if a higher minimum standard was applied, should HLF prescribe which outcomes it values most highly (beyond the focus on learning about heritage)? Third, should HLF scale back any consideration or expectation that small grants (of up to £10,000) can achieve outcomes in relation to environmental impacts or the local economy? Fourth, what significance should be attached to the claims about the numbers of volunteer that projects say will be involved? And fifth, should the language of the outcome relating to ‘organisational resilience’ be rephrased? We return to these points in later chapters.

Evaluation Aim 2

To establish how the Outcomes Framework impacts on project design, planning, and delivery

- 9.11 During the qualitative data gathering (telephone interviews with both successful and unsuccessful applicants, and case studies) applicants were asked about their awareness, knowledge, use and views of the Outcomes Framework.
- 9.12 Both successful and unsuccessful applicants demonstrated an awareness of the outcomes framework. Detailed knowledge of the framework was strongest amongst those organisations with paid staff, especially those where particular individuals had responsibility for submitting grant applications on a regular basis. For many of the smaller organisations, especially those which were volunteer-led (with no paid staff), familiarity with the framework was at a fairly general level.
- 9.13 Most applicants viewed the framework in a positive light, and there was comment across all organisation types to the effect that it was useful that HLF was clear about the types of projects it wished to fund. (Indeed there were many comments to the effect that HLF was clearer than other funders about what it wanted to achieve.) However, few applicants used the framework in a systematic way to plan and / or

deliver their project. Mostly it was used to confirm that there was a 'fit' – at a broad level - between the project idea and the outcomes which HLF wished to achieve.

- 9.14 More specifically, there was comment that the early discussion with HLF about the planned project (or feedback received on the Expression of Interest, when this stage was still part of the grant awarding process), had prompted potential applicants to focus more on the heritage aspects of their work. This was particularly the case for projects with a strong arts or music focus, which were subsequently developed to expand the heritage elements of their submitted projects.
- 9.15 The end of grant report asks projects to 'write a brief anecdote or story about the project and tell us which outcome or outcomes, you think it demonstrates your project achieved'. Thus, there is no requirement to report the evidence systematically against each intended outcome. Not surprisingly, in response to this projects varied considerably in the extent to which they utilised the framework in their end of grant reports. A small number of projects provided explicit evidence in relation to most or all of their intended outcomes; but for most projects, the evidence did not directly address each individual intended outcome. In our paper based assessments we made judgements about the achievement of outcomes where the evidence was implicit rather than explicit. In the telephone interviews and case studies we followed up the evidence in a more systematic way; this often led to an assessment that more outcomes had been achieved – and to a greater extent – than was evidenced in the end of grant report.
- 9.16 These findings prompt a number of questions about the use of the Outcomes Framework and how this could be developed. Could the application form and the end of grant report be modified to allow more systematic identification of both which outcomes were planned and which were achieved by the project? And could this be done in a way which retains the 'light touch' approach which characterises the programme – by for example, drawing on the BIG Lottery's 'Investing in Ideas' (Scotland) application form? ¹¹ If not, is there an alternative way to prompt a more purposeful use of the Outcomes Framework? We return to these points in later chapters.

Evaluation Aim 3

To assess the applicants' experience of the grant making process

- 9.17 Applicants - both successful and unsuccessful - were generally very positive about the grant making process which underpins the Sharing Heritage grants programme. The vast majority thought that the application and reporting requirements were appropriate, and that these both 'fitted' the scope of their project, and enabled them to describe it effectively. Notable praise and thanks were expressed for the personal contact (both face-to-face and on the telephone) with HLF officers. This had provided useful opportunities to receive helpful feedback on drafts and outline ideas, and to ask questions. The Expression of Interest stage (now discontinued) was also valued.
- 9.18 The organisations and groups which found the application process more difficult were, unsurprisingly, the small volunteer-led community groups (with no paid staff). There were examples, both from successful and unsuccessful applicants within this sector, of dissatisfaction with the application process. This is an important area to consider, given HLF's stated ambition to encourage small, first time, non-specialist community groups to apply to the fund.

¹¹ [Investing in Ideas grant programme](#)

- 9.19 As far as unsuccessful applicants were concerned, the aspect of the process which attracted most criticism was the feedback from HLF following the decision not to fund the project. Whilst some dissatisfaction from these applicants is probably inevitable, there is scope to improve the communication with unsuccessful applicants. Again, this criticism was sharpest amongst small, volunteer-led organisations (with no paid staff).
- 9.20 The research also found that around one-half of unsuccessful applications had managed to progress their project in some way, despite the lack of funding from HLF.
- 9.21 These latter points relating to the small, volunteer-led organisations (with no paid staff) are discussed at greater length in relation to Evaluation Aim 4 below.

Evaluation Aim 4

To assess the effectiveness of the current business model in providing an entry route into heritage for new and diverse groups

- 9.22 The Sharing Heritage programme is open to organisations that are experienced in the heritage field and those which are not. HLF wishes to attract 'new and diverse' groups to apply, and this includes organisations which have not previously applied, smaller community based and volunteer-led groups (with no paid staff), and groups that work with defined communities, with a particular emphasis on organisations representing BAME communities.
- 9.23 The Sharing Heritage business model is relatively successful in relation to some aspects of this agenda. For example, two-thirds of the applicants to the Sharing Heritage programme come from first time applicants, and their success rates (59% of all applications from first time applicants are funded) are comparable to the success rates of more experienced organisations (64%). Moreover, 72% of all applications come from the community / voluntary sector (rising to 77% if faith based groups are included) and these applications fare as well as those from the public sector in terms of their success rates in achieving funding. Finally, applications from Priority Development Areas (PDAs) are slightly more likely to receive funding than those from non-PDAs (73% for those in PDAs compared to 59% for those not in a PDA).
- 9.24 However, the 'reach' of the Sharing Heritage programme into a wider range of communities is limited. Only 5.6% of applications received are relevant to BAME communities (3.7% are led by BAME communities, and a further 1.9% seek to engage with BAME communities), 2.4% to disability groups, and just 0.4% to LGBT groups. For these groups, however, the success rates for applications are very high (ranging from 86% to 100%) which reflects HLF's commitment to funding applications from these wider community groups.
- 9.25 The evaluation has demonstrated the high added value of funding smaller volunteer-led community groups (with no paid staff). They bring a commitment of time, volunteer effort, community support, specialist knowledge, and high social capital. Our data collection has highlighted that these organisations are also the most likely to experience difficulties with the application process. This raises both substantive and measurement issues.
- 9.26 In substantive terms, these organisations represent a potentially useful entry point for those community groups generally under-represented in the heritage sector (BAME, disability or LGBT groups). There is merit in discussing how this can be capitalised

on. In addition, it is important to consider whether there is a strategic rationale for offering such groups additional support or perhaps even an alternative application process which focuses more on face-to-face (rather than paper based) assessment. This point is returned to later.

- 9.27 Second, from a measurement perspective, the classification of 'organisation type' does not currently allow for organisations with no paid staff to be separately identified. The addition of this information would be useful to quantify the numbers in this sector, to monitor their success rates, and to facilitate a discussion about any additional or differentiated support for this group.

Other issues

- 9.28 In addition to the discussion reported in relation to the four evaluation aims above, our data collection has also touched on a range of other issues which are pertinent to the Sharing Heritage programme. These are: measurement and definitional issues; the HLF decision making process; and benchmarking quality. These are discussed in turn below and returned to in later chapters.

Measurement, recording and definitional issues

- 9.29 The foregoing has identified a number of measurement and recording issues, namely whether 'organisational resilience' should be redefined or reworded (para 9.10), and the potential value of creating an organisation type to capture information about organisations with no paid staff (para 9.25). A number of other related issues should also be highlighted.
- 9.30 The classification of heritage type may require further development. The dominant categories are 'intangible heritage' and 'community heritage'. The definition of these categories is not clear to the research team and it may be worth revisiting the classification to see whether a more transparent description of the categories can be achieved. Also, in terms of understanding the value for money, and the leverage of grants, it would be useful if any partnership contributions were recorded on the database; this is not currently done.
- 9.31 More broadly, outcomes are not always clearly defined, and this is particularly the case for outcomes which are more distant from the project, more diffuse, or inherently more complex to measure or define. The outcomes which we found most difficult to assess were: 'people will have changed their attitudes and / or behaviour', 'environmental impacts will be reduced', and 'your local economy will be boosted'. It might be worthwhile attempting to identify some exemplar metrics in these cases.

The HLF decision making process

- 9.32 Whilst there is no direct 'read across' from the case paper assessments prepared by HLF and the paper based assessments we have undertaken in relation to the 100 selected projects, there is broad congruence between the two approaches. The case papers confirm that the decision making does prioritise the 'people outcomes' (as identified in the programme guidance), and this is appropriate.
- 9.33 In addition, the case papers when considered in aggregate, confirm that there is a positive relationship between the risk assessment undertaken by HLF officers, and the degree to which intended outcomes are achieved, with low risk projects more likely to fully achieve their intended outcomes. This gives confidence that the risk

assessment process has validity. There is also an aggregate positive relationship between the value for money assessments and the degree to which intended outcomes are achieved, with projects assessed as offering high value for money being more likely to fully achieve their outcomes.

- 9.34 However, a note of caution also applies. There is a small indication that HLF assessments may overestimate the contribution that projects make to outcomes, particularly communities outcomes; this may be linked to the observation above that some of the communities outcomes (particularly in relation to environmental impacts and the local economy) are inherently difficult to define.

Benchmarking quality

- 9.35 As set out in para 4.9 above, there is a large degree of variation in the funding rates across regions. This could be a consequence of a variation in quality across regions, with the applications from some regions being of lower quality than others. However, an alternative explanation is that the amount of funding distributed to regions is allocated in a way which does not take into account the distribution of the quality of applications across regions. This raises the question of whether a project of similar / identical quality has the same chance of funding whichever region it is submitted in.
- 9.36 Linked to this issue of benchmarking quality is the observation – based on the HLF case papers for unsuccessful applications – that a small number of very high quality applications are unsuccessful. In the case papers we examined, three (out of 15) were assessed as representing high value for money. By contrast, in the successful applications, four (out of 100) were assessed as representing low value for money and a further third (35) as representing medium value for money. Clearly there is a time dimension to this as projects are considered in relation to the pool of applications available at a specific time; however, as far as possible it is important to ensure that high value for money projects are not rejected in favour of low value for money projects when considered on a national basis. This would require a nationally coordinated approach.

10 Conclusions

- 10.1 The overall picture of the Sharing Heritage programme which has emerged from this evaluation is broadly positive from the point of view of both processes and outcomes. The evaluation has also identified a number of areas for further development. The conclusions from this evaluation, including the areas for development, are set out below.

Achievement of HLF outcomes

- 10.2 We found examples where each of the outcomes in the HLF Outcomes Framework were achieved as a result of the Sharing Heritage programme. On the whole, projects seek to achieve multiple outcomes, rather than being limited to one or two. There is a strong relationship between the outcomes that projects intended to achieve and the outcomes which were actually achieved. Moreover, the end of grant reports tend to underestimate the extent to which outcomes are achieved; more detailed interrogation of projects (using face-to-face methods) leads to a more positive assessment of the achievement of outcomes.
- 10.3 HLF's prioritisation of the outcome relating to 'learning about heritage' is reflected in the applications which it funds. Almost all projects address this outcome successfully. The achievement of outcomes relating to the interpretation of heritage, the identification and recording of heritage, the contribution of volunteers, the acquisition of skills, and the delivery of an enjoyable experience are also widespread. By contrast, only a few projects deliver on economic benefits, or on reducing negative environmental impacts. Even where these are addressed, they are hard to evidence, especially in the context of a short timeframe.
- 10.4 The skills which are developed as a consequence of the Sharing Heritage Programme are wide ranging. For staff these tend to focus on project management, organisational and people skills. For volunteers and participants the skills are often about developing heritage skills as well as 'softer' skills.
- 10.5 Volunteers are crucial to the success of the programme and projects have successfully harnessed their contribution. A substantial majority of projects involve volunteers, often in significant numbers. They bring specialist skills as well as a more general commitment of time, enthusiasm, and energy, without which projects would be diminished. However, there is also evidence that the numbers of volunteers actually involved is smaller than intended in around one-quarter of projects.
- 10.6 The 'ripples' from the Sharing Heritage programme are substantial. Most projects are able to demonstrate a degree of sustainability. This is largely as a result of new skills having been developed, partnerships having been forged, the creation of new relationships and networks, and the organisational profile being raised. In some cases, applications for further grant funding happen as an indirect consequence.
- 10.7 There is evidence that projects can achieve a legacy which is sometimes disproportionate to the amount of funding provided. A small subgroup of projects appear to have long lasting effects, which are hard to measure, but which are significant in bringing communities together and breaking down barriers.

Impact of the Outcomes Framework on project design, planning and delivery

- 10.8 The Outcomes Framework provides helpful clarity about what HLF wants to achieve, and applicants are aware of it. Detailed knowledge and understanding of the Outcomes Framework is widespread amongst more established organisations with paid staff, especially those organisations where there is an individual with responsibility for generating external funding. For many of the smaller organisations, especially those which are volunteer-led (with no paid staff), familiarity with the framework is at a very general level.
- 10.9 In most cases, the Outcomes Framework tends to be used retrospectively to interpret project outcomes, rather than prospectively to plan and design the project. The exception to this was in relation to projects where the organisation's primary focus was not heritage (for example organisations which focus on music, or the arts). In these cases the Outcomes Framework was used purposefully to develop the heritage aspects of applications.
- 10.10 The impact of the Outcomes Framework would be increased if the paperwork required by HLF (application form, end of grant report) required more explicit reference to the Outcomes Framework.

Grant making process

- 10.11 The grant application process is 'fit for purpose'. The 'light touch' approach is appropriate and the relationships between applicants and HLF staff are on the whole excellent. However this 'light touch' approach has implications for the extent to which a robust evaluation of the programme, based on the paperwork only, can be conducted.
- 10.12 There is a continued requirement for interaction with HLF staff, and the removal (in 2013) of the Expression of Interest stage attracted negative comment from the substantial number of organisations who said it had been a valuable part of the process.
- 10.13 The group of organisations who find the grant making process most challenging are small, volunteer-led organisations (with no paid staff). These organisations would benefit from additional support at all stage of the application process.
- 10.14 There is scope to improve the feedback given to organisations whose projects are not successful. This feedback requires sensitive handling, especially in the context of small organisations with limited capacity and experience of applying for funds.

New and diverse applicants

- 10.15 The Sharing Heritage programme has been successful in attracting first time applicants, and applications from the community / voluntary sector, as well as applications from organisations who would not see themselves primarily as 'heritage' organisations.
- 10.16 However, the programme has been less successful in attracting applications from a wider range of communities. These include BAME groups (which is a corporate priority for HLF), and other groups under-represented in the heritage sector, for example, disability groups, and LGBT groups.

- 10.17 The small volunteer-led community groups (with no paid staff) provide high added value in terms of social and cultural capital, and can offer a potentially useful entry point for new BAME, disability, and LGBT audiences. Applications led by these groups may require additional support, and in particular might benefit from a face-to-face (rather than paper-based) assessment process (see para 10.13 above).

Measurement, recording and definitional issues

- 10.18 There are a number of areas where our evaluation has led us to conclude that further development is required in relation to measurement, recording or definitional issues. Some of these have already been mentioned in relation to the conclusions relating to the evaluation aims.
- 10.19 The main areas in relation to measurement and recording are: to identify as a separate category of 'organisational type' organisations with no paid staff; to record data in a suitable format to allow information at an aggregate level on partnership funding to be reported; to provide some example metrics for the outcomes which are hardest to evidence ('people will have changed their attitudes / behaviour'; 'environmental impacts will be reduced', 'your local economy will be boosted').
- 10.20 The main areas for development in relation to definitional issues are: to revisit the description in relation to 'organisational resilience', which is a not a terminology that applicants understand or use; to reconsider the value of the descriptors 'intangible heritage' and 'community heritage'.

HLF decision making process

- 10.21 Our examination of the HLF case papers has led us to conclude that the HLF decision making process is broadly robust. We have been able to confirm that the HLF decision making process prioritises the 'people outcomes'. We have also been able to confirm that the risk assessments and the value for money assessments undertaken by HLF provide good indicators of the likelihood that a project will fully achieve its intended outcomes.
- 10.22 However our assessment has also led us to conclude that the HLF assessment process may overestimate the contribution that funded projects make to communities outcomes.
- 10.23 In addition, the high success rates for applications received from wider community groups (BAME, disability, LGBT), demonstrates HLF's commitment to funding in these areas.

Benchmarking quality

- 10.24 We have found that a small number of projects which are judged to represent low value for money are funded, whilst a few projects which represent high value for money are not funded. We have also found substantial variations in funding rates across UK regions. Whilst the reasons for this are not completely clear, we believe it would be appropriate for HLF to examine this issue internally, with a view to ensuring that the quality of funded applications is appropriately benchmarked.

11 Issues for further consideration

11.1 In this final chapter we set out our thoughts on the development of the Sharing Heritage programme, based on four 'scenarios' namely i) building on the status quo ii) developing a stronger focus on community / voluntary organisations iii) revisiting the relationship between the Outcomes Framework and the Sharing Heritage programme and iv) developing a strategic partnership with the UK Arts Councils. In order to make the discussion of these scenarios clear, they are presented as discrete options; however a 'mix and match' approach, drawing on elements of each is entirely possible.

Scenario 1 – Building on the status quo

11.2 Throughout this report, we have made a number of suggestions about how the Sharing Heritage programme, and the processes which underpin it could be improved. In paras 11.3-11.9 below, we gather this information together and set out the full range of changes (some very minor, others more substantial) we think would represent a positive evolutionary development of the programme.

Improving the HLF database

11.3 Two suggestions for improving the HLF database are:

- The coding of 'organisation type' should be improved to subdivide the organisations currently identified as 'community / voluntary' so that volunteer-led organisations (with no paid staff) can be identified as a separate group.
- A field should be added to each application to capture the information about financial contributions (from partnership or other sources).

Revisiting definitions

11.4 There are suggestions for revisiting some of the definitions within the Sharing Heritage programme as follows:

- In relation to heritage type, the use of the terms 'intangible heritage' and 'community heritage' are not particularly transparent or clear; this means that any analysis based on heritage type is difficult to interpret.
- Applicants to the programme do not themselves use the terminology of 'organisational resilience'. The definition of this outcome, and the guidance on how to measure it should be revisited.

Developing guidance

11.5 There are also some suggestions for improving the guidance offered to grantees and applicants as follows:

- A simple and accessible 'toolkit' could be developed outlining in practical and straightforward terms some key techniques for gathering data on achievement of the framework outcomes. Exemplar metrics on how to measure these, especially those which are most difficult to measure ('change attitudes and / or behaviour', 'reduce environmental impacts', 'boost the local economy') would

help improve understanding of the aspirations for the programme. It would be important to couch this in language that is accessible to volunteer-led community groups (with no paid staff) with little or no experience of evaluation¹².

- Given the 'gap' which exists between what is anticipated in terms of the numbers of volunteers to be involved, and what is actually achieved in practice, the guidance might usefully urge a cautious approach to how applicants approach this outcome in their submissions.

Incorporating the Outcomes Framework into application forms and end of grant reports

- 11.6 A requirement for applications to report both their intended outcomes (in their application forms) and their achieved outcomes (in their end of grant reports) in relation to the HLF Outcomes Framework would increase the focus on - and the visibility of - the framework.
- 11.7 It would be important to do this in a way which retained the 'light touch' approach of the Sharing Heritage programme. We are aware that the BIG Lottery Fund (Scotland) uses an approach to this in its 'Investing in Ideas' programme, which requires applicants to specify their intended outcomes against BIG's outcomes. This offers a starting point for considering this further.

Improvements to the grants process

- 11.8 The main improvements which are suggested are to:
- Offer additional support to volunteer-led organisations (with no paid staff) throughout the application, delivery, and reporting process. (See Scenario 2 below for a more comprehensive discussion of this issue.)
 - Ensure that feedback to unsuccessful applicants is as timely, comprehensive, and sensitive as possible.

Benchmarking quality

- 11.9 The programme would benefit from a degree of national coordination, to ensure that i) the quality of projects funded does not vary substantially across regions and that ii) projects which are judged to represent low value for money do not take precedence over projects which are judged to represent high value for money.

Scenario 2 – Developing a stronger focus on community / voluntary organisations

- 11.10 The Sharing Heritage programme is aimed primarily, although not exclusively, at voluntary sector groups and community organisations. At present, 72% of applications are from community/ voluntary groups, and this rises to 77% when faith based organisations are included. By contrast, 23% of applications come from public sector organisations.
- 11.11 Given that the programme as a whole is oversubscribed, and that the funding climate is become increasingly challenging, there is potential – and a possible strategic

¹² Some evaluation guidance is supplied.

benefit – to targeting the programme more strongly towards community / voluntary organisations.

Subgroups within the community / voluntary organisation category

- 11.12 The composition of the community / voluntary organisation category is very heterogeneous. At one end of the spectrum, organisations in this category are well established, with substantial numbers of paid staff and a strong organisational infrastructure. At the other end of the spectrum, organisations have no paid staff, no infrastructure and are entirely volunteer-led.
- 11.13 In order to understand the needs of this sector better, it is important to develop a finer classification scheme which distinguishes between different subgroups. At the very least this means identifying organisations which have paid staff from those which do not. A further classification of community / voluntary organisations with paid staff into large / medium / small and / or into local / regional / national might also be useful.

Improving the reach into 'new and a wider range of community groups

- 11.14 As set out earlier, the current reach into new and / or more diverse community groups is limited. However, there are examples within the community / voluntary organisations sector of BAME, LGBT and disability projects. The networks of these existing funded projects could be used more strategically to advertise the Sharing Heritage programme, to promote learning, and to share expertise. This could include, for example, working with the relevant voluntary sector 'intermediary' or 'umbrella' bodies such as Stonewall (for the LGBT community), BEMIS (for the BAME community in Scotland), and the UK Disabled People's Council (for people with disabilities).
- 11.15 The experience of existing Sharing Heritage projects working with the identified community groups could be substantially built on to generate greater interest from similar groups. In particular, articles and case studies of existing funded projects could be circulated to other similar groups; and networking events or seminars could be used to explore how best to capitalise on current practice to further promote the Sharing Heritage programme. If resources permit, structured research could be undertaken both with organisations who have hosted Sharing Heritage projects and with potential organisations who have not, to investigate practical approaches to developing the programme within the intended communities.

Additional support / alternative application process for volunteer-led organisations (with no paid staff)

- 11.16 As has been noted earlier, volunteer-led organisations (with no paid staff) bring a commitment of time, volunteer effort, community support, specialist knowledge, and high social capital. However, as established in this evaluation, these organisations also have the greatest difficulties and challenges in engaging with the process, particularly in relation to writing their application form and their end of grant report.
- 11.17 There is therefore a strong rationale for offering this group of organisations additional support. This could simply be about offering these organisations more 'handholding', at application, delivery, and reporting stages.
- 11.18 More fundamentally, there is a case for considering a rather different application process for organisations with no paid staff. A process which focuses more on face-

to-face assessment, with potential applicants being interviewed by HLF staff, may be more appropriate for these organisations than a paper-based assessment process.

- 11.19 Moreover, whatever type of support is offered to these organisations, it is vital that feedback on any unsuccessful applications is handled sensitively. A full discussion of the reasons why the application was not funded is vital in maintaining the support of this strategically important and influential group.

Setting Targets

- 11.20 Given the low levels currently being achieved in relation to disability and LGBT groups, it may be appropriate to set some targets for i) attracting applications from these groups and ii) funding applications from these groups¹³.

Scenario 3 – The relationship between the Outcomes Framework and the Sharing Heritage Programme

- 11.21 The evaluation has identified a range of issues with the HLF Outcomes Framework which indicate that it may be appropriate to revisit the relationship between the Outcomes Framework and the Sharing Heritage programme. The main issues are discussed below.

Raising the minimum requirement

- 11.22 Whilst the HLF guidance stipulates as a minimum requirement that at least one of the 'people outcomes' should be achieved and places most value on the outcome 'people will have learnt about heritage', in practice almost all projects achieve much more than this.
- 11.23 Our paper-based evaluation found that, on average, projects intended to achieve 7 outcomes, and actually achieved 6 outcomes. Moreover, as we moved from the paper based assessment elements of the evaluation to the more in-depth components (telephone interviews, case studies) we found more evidence of achievement of outcomes. The projects we examined in depth provided both more evidence that intended outcomes (as indicated on application forms) were achieved, as well as evidence that outcomes which were not signalled in the application form had in fact been addressed.
- 11.24 The lack of congruence between what is required (as a minimum) by HLF and what is actually achieved, suggests that there is a case for revisiting the relationship between the Outcomes Framework and the Sharing Heritage programme.
- 11.25 One possible response is to set the minimum requirement which projects are expected to achieve at a substantially higher level. This could be promoted as a very positive message about the success of the programme to date, and the high aspirations that applicants to the programme have.
- 11.26 Raising the minimum requirement could be done in a number of ways by:
- defining other specific priorities from amongst the (13) other outcomes which would also need to be addressed before funding would be considered.

¹³ Targets already exist in regard to BAME groups.

- requiring that a certain number of outcomes (say 3) in addition to the ‘learning about heritage’ outcome would also have to be achieved.
- requiring projects to achieve outcomes not just from the ‘people outcomes’ grouping but from one or more of the other domains (heritage, communities) as well.

11.27 Whilst we are not able to offer definitive comment in relation to these options it does seem to us *a priori* that some outcomes (e.g. ‘people will have had an enjoyable experience’, ‘your local area / community will be a better place to live, work or visit’) are by-products of the grant rather than the driving force behind them, and therefore less suitable as candidates for priority status.

Defining and measuring outcomes

11.28 We have found it difficult to judge whether some of the outcomes in the framework were achieved. These difficulties relate both to the definition of the outcome and to its measurement (including over what time period).

11.29 The outcomes which we found most difficult to judge were:

- ‘People will have volunteered time’. As indicated earlier, there were frequent shortfalls between what was intended and what was achieved in relation to volunteering, with projects often making (over) ambitious claims in their application forms.
- ‘People will have changed their attitudes and / or behaviour’. Measuring changes in attitudes (and behaviour) is a complex process requiring the use of sophisticated tools. In addition, timescales for attitude / behaviour change do not sit easily with very short term projects.
- ‘Environmental impacts will be reduced’. Measuring environmental impacts is a highly complex process which needs to take into account both harms and benefits. Not surprisingly, projects focused on the reduction of negative benefits but did not comment on whether there were any additional harms introduced. Any conclusions about this are likely to be highly contestable. Moreover, this is a very ambitious outcome to anticipate from a small grant and we questioned whether it was realistic to include this.
- ‘Your local economy will be boosted’. As with the outcome relating to environmental impacts, we questioned whether it was realistic to anticipate that a small grant could achieve this. In addition, measuring change in the local economy is fraught with difficulty and any claims are likely to be highly contestable.

11.30 Given these difficulties, we would suggest that consideration would have to be given to the measurement of these outcomes if they were to be selected in relation to raising the minimum requirement for projects as set out in para 11.25 above.

Simplifying the Outcomes Framework

11.31 Overall, we question the wisdom of structuring a small grants programme around a framework with 14 separate outcomes. It seemed overly complex. In the interest of transparency and simplicity, we favour an approach with a smaller number of

outcomes and a greater sense of the priority attached to each. The most important outcomes for this programme in our view are 'people will have learnt about heritage', 'people will have volunteered time', 'people will have developed skills', 'heritage will be better interpreted and explained', 'heritage will be better managed / in better condition' and 'more people and a wider range of people will have engaged with heritage'.

- 11.32 We think a programme structured around these would offer all the benefits of the more complex set-up and would have the added bonus of being in-keeping with a 'light touch' approach.

Developing a Logic Model

- 11.33 We think there would be benefits to developing a logic model for the Sharing Heritage programme. The development of a logic model could be used as a facilitation tool to prompt a discussion of the inputs, activities, short term outcomes and medium and long term impacts of the programme. A logic model would also provide a visual representation of the programme, as well as an accessible description of the rationale for the programme, its context, any underlying assumptions and the external factors which affect programme implementation.

Scenario 4 – Developing a strategic partnership with UK Arts Councils

- 11.34 Throughout the report we have described the interplay in a subset of applications between the heritage elements and the arts elements of projects. From HLF's perspective this is sometimes viewed in a positive light (because projects from organisations who do not primarily see themselves as 'heritage organisations' have been extended and redeveloped to focus on the heritage aspects), and sometimes in a negative light (because HLF is 'picking up' projects that Arts Council England (ACE) / Creative Scotland (CS) / Arts Council of Northern Ireland / Arts Council of Wales would have funded in the past).
- 11.35 Some of these 'crossover' projects (eg conFAB, Artcore) provided strong evidence of achievement across a wide range of outcomes. We suggest that HLF should share the learning from Sharing Heritage with UK Arts Councils and work closely in partnership to promote the impact and benefits of small grants. We think there could be benefit to both HLF and UK Arts Councils of these discussions taking place at a senior level.
- 11.36 In order to inform this discussion, a range of case studies of relevant projects which demonstrate the quality and variety of exemplar projects from the Sharing Heritage programme should be written up and shared with strategic partners.

Appendix 1

Profile of 100 Selected Applications

The tables below show the composition of the 100 selected applications in relation to key variables.

REGION

Region	Count
East Midlands	5
East of England	10
London	10
North East	5
North West	11
Northern Ireland	4
Scotland	11
South East	11
South West	11
Wales	6
West Midlands	5
Yorkshire and The Humber	11
Grand Total	100

ORGANISATION TYPE

Organisation Type	Count
Church organisation or other faith-based group	8
Community/ voluntary	66
Local authority	13
Other Public Sector	13
Grand Total	100

HERITAGE TYPE

Heritage Type	Count
Community heritage	35
Historic buildings and monuments	13
Industrial maritime and transport	5
Intangible heritage	28
Land and biodiversity	6
Museums libraries archives and collections	13
Grand Total	100

PRIORITY DEVELOPMENT AREA

PDA?	Count
Yes	30
No	70
Grand Total	100

FIRST TIME APPLICANT STATUS

First Time Applicant?	Count
Yes	73
No	26
N/A	1
Grand Total	100

SIZE OF GRANT

Grant Size	Count
Small	15
Medium	32
Large	53
Grand Total	100

COMMUNITY GROUPS

Community Group type	Count
BAME - led	13
BAME - seeking to engage	0
Disability	5
LGBT	4

Appendix 2

10 case studies

Artcore: 'The Web of Water'

Project summary

'The Web of Water' explored attitudes towards, and cultural traditions linked to, water through historical explanation, community participation, artistic practice and environmental discussions in the county of Derbyshire. The project was built around an understanding of the architectural heritage of wells in the British landscape, and the tradition of well-dressing in Derbyshire, and included heritage walks and talks, art exhibitions and installations, visits, research activities and workshops. The grant award was £10,000.

People interviewed (n=8)

- Executive Director, Artcore
- Artistic Director, Artcore
- Apprentice, Artcore
- Director, Déda Dance Academy, Derby
- Volunteer / Participant x 2
- Tutors at Derby College x 2

Process

The development of the project was led by the Executive Director of Artcore. She explained that when she was first thinking about The Web of Water, she was focussing mostly on the artistic elements. However, she came to realise that the project was actually as much about heritage, particularly the history connected to well-dressing in Derbyshire. She discussed her ideas at an early stage with HLF at a Funding Fair organised by Community Action Group. This discussion was followed up first at an individual meeting where "new areas for engagement were opened up", and then at a training workshop which HLF ran in Nottingham. The account of the interaction with HLF in securing funding was very positive.

"[HLF] were very supportive of our questions. I was given the right information right away. I could pick up the phone and ask them more questions. Their advice really helped us structure our project to fit their criteria. At the workshop they went through hypothetical questions. They wanted us to have a project that linked into peoples' stories. That helped us. They also said we should keep it focussed, because it has to be manageable." (Executive Director)

The Artistic Director also emphasised how much they had learned through the process.

"It was totally new for us, the heritage side. We really liked it and the engagement part. It fulfils that value – giving back to the community. That heritage part has brought a lot of learning to the project." (Artistic Director)

Outcomes

The Web of Water delivered against the outcomes in all three categories – heritage, people and communities.

Outcomes for heritage

The main heritage focus for The Web of Water was in shining a light on and improving awareness of the Derbyshire tradition of well-dressing. The project was launched with a talk and demonstration by a local historian and practising well-dresser, which was attended by 45 people. Towards the end of the project, there was a community engagement event attended by 44 people, where people learnt about well-dressing and then created their own floral pieces.

“People in Derby are not aware of it [well-dressing]. The well-dressing craft is dying. Well-dressing made us think about the architectural forms of water and how it connects to the five elements of nature and worship. Creating awareness of young people about well-dressing helps young people to think about Water as a topic, its uses and misuses, its importance for life.” (Artistic Director, Artcore)

“When we went to well-dressing we saw the culture and heritage of UK. The children saw an old style well. They helped to make a well-dressing with flowers and seeds. My mum came as well. She lives in India. She enjoyed the visit and learned a lot about well-dressing.” (Participant)

In addition, young people from the National Citizen Service went into the community to record oral histories on the themes of the use and misuse of water. The final collection of selected stories was made into a short video film¹.

Outcomes for people

There were many ways in which The Web of Water project helped people to develop skills, learn about heritage, change their attitudes and behaviour, have an enjoyable experience and volunteer their time.

An apprentice at Artcore, who worked on a wide range of administrative, technical and social aspects of Web of Water commented that:

“I have worked and developed through the project. It developed me. I got to see different cultures and their different ideas and opinions about water. That was new and interesting.” (Apprentice)

Whilst the apprenticeship was coming to a close, there were plans to continue his employment on a part-time basis; maintaining this continuity is important to Artcore, and there is evidence that they invest in staff in ways that are mutually beneficial.

The learning (about heritage) was paramount and highly relevant:

“At the museum my children saw the first flushing toilet in Derbyshire. My children started talking to each other about why it is important to turn off the tap. It is very good for the children to think a bit about water and not just take it for granted.” (Participant)

A lot of our students have been really inspired by Web of Water. They loved coming. The workshops were very interactive - so different from what they had done before. And it didn't matter if you had skills or no skills, you could still join in. The research they did and the work they produced was amazing. (Tutor, Derby College)

In total, around 80-100 volunteers work with Artcore, and many of these were involved with The Web of Water. The volunteers work across a wide range of areas including administration, accounting, facilitation, and providing expert knowledge. The organisation's focus on being inclusive, and on valuing everyone's contribution was striking:

"The culture and values of the organisation is hugely positive. The way they work with volunteers is fantastic. Their volunteers are a credit to them; they come well drilled!" (Director, Déda)

"I'm doing volunteering continuously here. I am working here and I receive happiness. It is friendly. Work is good. Here our aim is to do work for the community. We work for the community more than for money. There are deeper things going on. It is my aim to give at least 4 hours a week. When I came here I was confidence-less. But now I am building my confidence. Working with people. Speaking English." (Volunteer)

Outcomes for communities

The Web of Water had a very wide reach into communities; over 1500 people took part in the project. There were community participation events, visits, talks, workshops, research sessions and celebration events. The project made people think about their use of water, its availability, and its use and misuse. Many individuals, including those who went on the visits (to for example the Clay Mills, Sharpe's Pottery Museum, or Carsington Water), had not visited these places before.

"When you take the young people on these trips and ask – have you been here before? – very few have. You can tell them about the history of the area. It gets them thinking and asking questions." (Executive Director)

This comment was echoed by a participant:

"It is good for the community to know what is in the past. The link with India is very exciting." (Participant)

The Web of Water (and its host organisation) is based in a part of Derby which is very deprived according to national indicators of deprivation. This is a place to where new migrant communities come when they first arrive in Derby. Having the project based there (in Normanton) helped to change peoples' views of the area:

".. this area of town is not thought of in a nice kind of way. It is stigmatised. It's quite segregated here. This side of town is not normally ventured into. The students [from Derby College] haven't been here before. It really helps them to get a different viewpoint, coming here, to the project. It's such a special place." (Tutor, Derby College)

Partnerships

The Web of Water helped create new networks for Artcore, through establishing a range of partnerships, both formal and informal. The partnership organisations were:

- Severn Trent
- Déda (Dance School)
- East Midlands Oral History Archive

- Nottingham and Derby City Council
- Derby & Sandiacre Canal Trust
- Nottingham Asian Arts Council
- Sharpe's Pottery Museum
- Claymills Pumping Station
- Carsington Water
- Etwall Well-dressers
- An Indian Summer (Arts festival)
- A range of local organisations including JET, Hamaari, Sahara Group, Indian Community Centre.

These partnerships were fundamental to the success of the project, and Artcore (and The Web of Water project) were highly valued for their expertise and skills, as illustrated in the quote below.

“When they [Artcore] come and talk I listen to them. Such a small organisation. They punch massively above their weight. They are a great asset to the city. We try to do something with them every year. It was great that they were able to hold their celebration in our new space. They were the first people to visit and we got a lot of positive feedback about the event.” (Director, Déda)

Sustainability

The Sharing Heritage grant for Web of Water was awarded to Artcore in August 2013. In November 2013, Arts Council England awarded Artcore a grant which built on their Web of Water project. In 2015, Artcore was awarded funding for another Sharing Heritage project. Developing the funding base in this way has allowed the organisation to build up capacity in relation to its heritage work.

There is a continuously evolving set of partnerships and partner organisations. In recent months Artcore has developed a new partnership with a local church which was closed for refurbishment. The church had approached Artcore and asked them to design and erect the hoardings while the restoration work was going on. These evolving partnerships provide Artcore with opportunities for further ‘reach’ into the local community. In addition, substantial web-based materials¹⁴ have been generated, as a permanent legacy.

Partners identified a requirement to ensure the organisation receives additional funding, so that it can develop further. One partner was optimistic that this was a realistic prospect:

“I think it is looking hopeful that they will get funds to allow them to develop the organisation. The next round of [Arts Council England] 3-year grants is currently being discussed and they will try to go for this level of support. They really deserve it and I hope they will succeed.” (Director, Déda)

¹⁴ [Art Core Website](#)

Charterhouse Returns Trust

'Charterhouse Returns'

Project summary

The Charterhouse Lifeboat, the first motorised lifeboat in Wales, came to Fishguard in 1909. The vessel was involved in the heroic sea rescue of a Dutch motor schooner in 1920, for which many medals for bravery were awarded. The Charterhouse Lifeboat was donated to the communities of Fishguard and Goodwick in 2009 where it is currently being restored and conserved. The 'Charterhouse Returns' project promoted awareness, shared the heritage of, and celebrated this distinctive part of Wales maritime heritage through exhibitions, talks, promotional materials and practical work. The grant award was £7,800.

People interviewed (n=15)

- Board member, Maritime Heritage Trust Wales
- Chair, Charterhouse Returns Trust
- Treasurer, Charterhouse Returns Trust
- Committee member, Charterhouse Returns Trust x 2
- Assistant manager, Fishguard Bay Hotel
- Co-owner, Fishguard Bay Hotel
- Vice-convenor, Fishguard Bay Yacht Club
- Former owners, Charterhouse Lifeboat x 2
- Vice-Chair, Pembrokeshire County Council
- Representative, Fishguard and Goodwick Chamber of Trade and Tourism
- Co-representative, Chamber of Trade (T4V Group Ltd)
- Representative, Fishguard & Goodwick Community Forum
- Wife of the late Phil Davies, who found the Charterhouse Lifeboat and arranged for it to be returned to Fishguard

In addition, a letter of support was received from the Headteacher, Ysgol Bro Gwaun, Fishguard.

Process

The Charterhouse Returns project was run entirely by volunteers. The project application was written by a volunteer, who found the help provided by HLF staff invaluable. There was a huge sense of pleasure, gratitude and relief when the project was funded.

“There is only so many times you can ask the community to contribute. Instead of a begging bowl, asking for funds all the time. It took a little bit of pressure off the community to fund this.” (Committee member)

Outcomes

The Charterhouse Returns project delivered strongly against the outcomes in all three categories – heritage, people and communities.

Outcomes for heritage

At the core of the project was the physical artefact – the Charterhouse Lifeboat. Whilst the Sharing Heritage project grant monies were allocated to the production of materials, and

promotional activities to share the story of the lifeboat, there was also practical work, delivered by the volunteers to restore the lifeboat to its original state. The boat itself, and the long term aspiration to enable the boat to be displayed, visited and appreciated was key:

“It has to be something that has history attached, that has educational value. We thought of restoring it to be seaworthy but we have chosen to restore it to its original state. It is the artefact that matters. It is 106 years old. Important that you actually stand on the same boat – the same plank of wood – that our forefathers stood on.”
(Treasurer)

Sharing the story of the lifeboat had also meant that artefacts associated with the boat that would not otherwise have seen the light of day had been uncovered:

“I recently had a phone call from two Liverpoolians whose grandfather was on the boat when it did its big rescue of the *Hermina* in 1920.... They want to come to Fishguard and bring the gold watch which was presented to their grandfather by the Queen of the Netherlands so it can be added to our collection. They want it to go into the Maritime Museum we are planning.” (Chair)

Unearthing the Charterhouse lifeboat story, which through the project has been shared with more people, has generated interest in broader issues of the heritage of Fishguard and its harbour:

“The history coming to light has been great. Why Fishguard? Why this boat? Why was it moored here in such a little fishing port? Not many people knew that the *Lusitania* was coming in once a week for 9 years from New York to Fishguard. That story acts as a trigger in lots of ways.” (Committee member)

Outcomes for people

The project had a profound impact on many people. The impacts on young people were particularly striking. The project was significant in helping to develop their skills (practical, social, teamwork), but also in shaping and changing their attitudes. A trustee summed up the effects of the project as follows:

“The best thing [about the project] was the effect on the young people involved. Changed their attitudes. Quite literally wouldn't believe the change in these youngsters. Changed their attitudes completely.” (Trustee)

The project had an effect on pupils within the mainstream schooling system:

“On behalf of the pupils of Ysgol Bro Gwaun, I would like to thank you for inviting some of our pupils to work alongside you. To learn skills in a real work environment, alongside seasoned practitioners, has been a valuable experience for these pupils. They had a great time and are very proud of their involvement with the Charterhouse. It has helped them in their School work too, because it enables them to link the skills learned in the classroom to the world of work and hence their futures.” (Letter from Headteacher, Ysgol Bro Gwaun, Fishguard)

The project also had a profound effect on pupils following an alternative curriculum, who were able to undertake practical tasks as part of their learning in the community.

"Young people from the Point organisation, which is where people go when they are removed from school for educational and behavioural reasons, were involved. Two of them came to volunteer. They helped strip boat back to the original. The idea was to bring them here to develop them and do the work with us. When they went back to Point they wrote about it and said what they had got out of it." (Committee member)

Finally the project had an impact on children who visited the exhibition in the Fishguard Bay Hotel:

"Seeing the children genuinely seeming to take an excited interest in what they were viewing was the best thing about the project." (Assistant Manager, Fishguard Bay Hotel)

Outcomes for communities

The project had tangible evidence of engaging a wide and diverse range of people with this heritage:

"When we put up the pictures [of the Charterhouse lifeboat] on the Facebook page we got a very special reaction. Not just from local people but from further afield. The exhibition we put up went so well that we did another one. Turn out was very good. Exceptional in fact. People from over 80 different countries have seen the photos and heard the story." (Assistant manager, Fishguard Bay Hotel)

"It's great for the tourists. There are a lot of coach parties staying at the hotel. They use this as a base to explore Pembrokeshire from. Now, there is something significant right on their doorstep." (Co-owner, Fishguard Bay Hotel)

"[We are} trying to produce a project that encompasses the community. We could have given our money to a boatyard and asked them to do the work. But we've used the skills of other people in the community instead. That was a deliberate choice." (Trustee)

There was also a strong view that the project had made a contribution to giving the community a stronger sense of identity and pride in its history:

"The reminder of our forefathers, their heroism and their work ethic, helps restore our community pride. In times of austerity, it brings memories and hopes for the future." (Board member, Maritime Heritage Trust Wales)

"Alerting people to the heritage they've got is important. They take a great deal of pride in it." (County Councillor)

"[The community has]...gone from not knowing anything at all about the Charterhouse to now knowing. It has generated a huge amount of interest and pride. The headteacher wants to include more of the work on the Charterhouse in her local history studies lessons." (Trustee)

Whilst recognising that the Charterhouse project was quite small in itself, it was thought that there was a catalytic value in the project:

“We are looking how an impact which is initially quite small – how it can develop. We desperately need regeneration here. The developer and the Chamber of Trade are involved. The lifeboat can help. There are socio-economic benefits for the community.” (Trustee)

“Developing skills is paramount for regeneration. The Charterhouse project has helped with this.” (Co-rep, Chamber of Trade)

Partnerships

The Charterhouse Returns project established a range of partnerships, both formal and informal. The partnership organisations were:

- Conygar (Developer)
- Port Operator
- Maritime Heritage Trust Wales
- Fishguard Bay Hotel
- Rotary Club
- Fishguard Bay Yacht Club
- Pembrokeshire County Council
- Chamber of Trade
- Fishguard & Goodwick Community Forum
- Fishguard & Goodwick Chamber of Trade & Tourism

These partnerships were fundamental to the success of the project. For example:

“We are developing a North Pembrokeshire Heritage Centre. It would be great to have a link with the Maritime Centre in Fishguard. The initiative here is very positive.” (Representative, Fishguard & Goodwick Forum)

Sustainability

The Charterhouse Returns project is seen as the beginning of a journey to giving this unique piece of Wales maritime heritage its place. There are plans currently underway to apply to HLF for a larger grant (up to £100k) to complete the restoration of the Charterhouse Lifeboat. This would involve a major ‘scaling up’ of activity with much more formal financial and project management.

The developers Conygar have been given planning consent for a major development of the harbour and the waterfront. As part of this, there are plans for a Maritime Museum or Heritage Centre. Discussions have been held about how best to position the (restored) Charterhouse Lifeboat within the proposed museum.

In the meantime, Fishguard Bay Hotel plans to host another exhibition about the Charterhouse Lifeboat in Spring 2016, using material which has not been seen before.

Thus, there is ongoing commitment to build on the work funded through the Charterhouse Returns project.

Friends of Concord Beach: 'Educational mural depicting the flood of Canvey Island in 1953'

Project summary

A 77 metre mural has been painted on the seawall of Concord Beach, Canvey Island, which informs residents and visitors about the island's heritage from the great flood of 1953, and includes the development of the sea defences from the seventeenth century to the present day. The ten panels of the mural have been designed and painted by professional artists and volunteers, using materials collected by the Canvey Island Community Archive. The grant award was £10,000.

People interviewed (n=11)

- Chair, Friends of Concord Beach
- 4 artists
- Mayor, Castle Point Borough Council
- Councillor, Castle Point Borough Council
- Local MP
- Former Chair, Canvey Community Archive
- Volunteer, Canvey Community Archive
- Proprietor, Concord Cafe

Process

There were some important views about the mechanics of the grant process. In particular, it was felt that there was value in having a fund (such as Sharing Heritage) that was accessible to small community groups.

“They've been very good on the heritage side. I think it's about making sure more grass roots people know how to apply, that it's there. You don't want application forms that are designed to be filled in by three arts graduates and a local Council accountant. Often the most interesting and quirky things come from people who have other busy lives.” (MP)

The disproportionately large impact of a small grant, when utilised effectively by a group of activists, was noted.

“The main lesson is that for what was quite a small grant compared to other HLF grants, just how much something that is so visual and accessible can inspire an interest in community history. I'm not being flippant, but it's paint on a wall. It's not some restored building.” (Mayor)

“Small grants for community based initiatives really do a lot of good, when it really is community based and not institutional, not somebody's idea of what's good for somebody else.” (MP)

Outcomes

There was evidence that the project delivered against all three sets of outcomes - heritage, people, and communities.

Outcomes for heritage

The local MP commented on the use and management of public funds for cultural and heritage purposes, drawing a contrast between the murals and other forms of public art.

“If anyone wants to put money into public art, forget all the boring statues people put into town squares which people walk around. This has had a massive impact in a way I’ve never seen with any other bit of public art.” (MP)

People now understand the history of the 1953 flood, thanks largely to the murals – a gigantic piece of interpretation – 77 metres long. This depicts the key historical moments from the Dutch building of the original wall to the creation of the new flood defences.

Outcomes for people

While the artists who painted the murals were paid professionals, local people were involved in working alongside them in the creation of the murals, developing their skills in the process.

“Even if they just did a bit of green on the land, they said 'that's that bit I done there'. They were all very proud and took their families to see it - 'I put that bit of blue there'.” (Artist)

Everyone agreed that the project has given a new prominence to this particular piece of local heritage, with people learning about the flood and the community spirit that enabled people to survive it. It is felt to be a genuinely ‘democratic’ piece of artwork.

“I think it's given everyone something to talk about, something to remember. The whole summer I was down there, everyone was walking up and down saying 'I remember this, I remember that'. Everyone’s got different stories to tell. It brings a lot of people together.” (Artist)

“People would come along and buy me a cup of tea and say 'Thank you for doing that'. They enjoyed watching the stages of the art as it was progressing. It meant a lot to them. It was about the public, it was a people's mural for the people. And to see the public appreciate it in that way - job done!” (Artist)

“We're now getting people that are Canvey people, elderly Canvey people, people that used to be Canvey people, people that have some form of history with the island, coming back, reading about it. The amount of over 70s who turn up to the shop - 'Have you got a brochure?' They want to send it to Australia, Zimbabwe, to far flung parts of the world... Many people come here that are an older generation. They're now passing it down, and they might never have done that, they're telling their stories. And their children and grandchildren are learning what happened all those years ago.” (Cafe Proprietor)

A striking feature of the mural is its ability to draw back to Canvey some of the people it depicted from the 1950s. One panel shows a rescued three year old in the arms of a policeman.

“One of the people who came down was July Dolby's family and they invited her to the opening. She came - 61 years on. She appreciated it so much. She emailed me several times saying what it meant to her, saying it was something she never forgot. We sat down and talked for ages.” (Artist)

Another passer-by recognised a family member.

“So many people came telling me stories of their survival. One day I was working away, and there was a gentleman standing by with tears in his eyes, saying 'That's my niece'.” (Artist)

The project has had a marked impact on how people see the community. People spoke of the negative image that the island frequently has.

“A lot of people who aren't from Canvey sneer at Canvey. People think it's a dirt track island, the back end of nowhere.” (MP)

“I play music in a lot of places, and you say where you're from, and you say Canvey and people go 'hoho'. I do find it a bit offensive. I go to a folk club as well and they sing songs about Canvey which are not very nice! I wouldn't ever sing about Leigh or Westcliffe.” (Artist)

By contrast, the creation of the mural has gone a long way to offset this portrayal, with increased numbers of people coming down to the beach.

“It's taken more community interest to the beach, as something that the community own. It's a massive asset that people enjoy. It's not just a beach that's run by the council. It's helped local people take ownership. It's their beach, it's got their history on it.” (Mayor)

“Many people come here that are an older generation. They're now passing it down, and they might never have done that, they're telling their stories. And their children and grandchildren are learning what happened all those years ago.” (Canvey Community Archive)

Many people spoke of the collective community spirit which prevailed during the painting of mural, with the artists helping each other and the other volunteers who became involved.

“It was a very good atmosphere with all the artists. With a crowd of people you can get a bit of bickering. But there was none of that. We all got on beautifully. A few people - I would go and give a few pointers to. They would ask me if I mix this, what colour would I get?” (Artist)

The project was described as an initiative rooted in community activism and volunteering. It was contrasted with the way a local authority might go about it.

“Local authorities can't do it the way we would like it done. People have said if you can have a group of people that can get together and do those murals, it's all volunteer based.” (Former Chair, Canvey Community Archive)

A significant amount of time was (and continues to be) donated by the Friends of Concord Beach, in order to co-ordinate the project.

Outcomes for communities

The seafront area was described as having seen better days. However the advent of the mural has brought about a transformation to the environment, improving its amenity value dramatically.

“We've always been well supported with people, but as time has gone on, we've looked sadder. Many years ago, the graffiti, the foulness of it all meant that we began painting it so that where our chairs and table are, people wouldn't have to look at it while they were having a cup of tea. Last winter from a little seed, from fighting to save a paddling pool, now practically the whole of the foreshore is blue. The whole of the front of Canvey looking out to sea will in a very short space of time be blue. That's down to the Friends of Concord Beach.” (Cafe Proprietor)

There is a noticeable lack of vandalism.

“The nicest thing is they involve the youth and children. We have to do that in order to try to maintain things being left as they are. If you involve children and youth they're not so likely to mess it up or let their friends come and put graffiti all over it.” (Former Chair, Canvey Community Archive)

The project has drawn in a cross-section of the community, including young people.

“For the borough, it's absolutely fantastic. For a lot of young people in particular, what it's done is add a bit of a human element to the story their grandparents always tell.” (Mayor)

Local residents and elected members highlighted how the project has impacted on the self image of the community, with a tangible growth in community pride, leading to a real sense of ownership.

“This is the best thing that's happened to Canvey for years. It's such an important part of the history of the island. The hideous old sea wall – we love it because it protects us, but why has no one ever thought of using it? To have the mural on the sea wall is just genius.” (MP)

One of the artists reflected on coming ‘full circle’.

“I live on Canvey, so I got people walking along who recognised me from somewhere. It's a lovely thing. For an artist I think that's the best job you can be given. You're outside, and me being from Canvey I was doing a piece of art where I used to play as a kid - a place I'm very fond of.” (Artist)

One of the artists also mentioned that he acquired further commissions ‘on the back’ of the skills he had developed through the project.

“Career-wise - to have that in your portfolio, to say you have been chosen, that's helped me massively. I've got many things from that.” (Artist)

The local MP commented on the high levels of deprivation on the island.. The project has impacted on this.

“I don’t think it’s too far-fetched to say it’s helped the regeneration of that part of the island. It’s made people feel that this part, which had been a bit run down, has now turned a corner in the last couple of years.” (MP)

A lingering fear about potential future flooding of the area was seen as having been addressed through the project, and a measure of community re-assurance given.

“It’s more than a picture on the wall. I know for a fact that it’s put people’s minds at rest, because they were worried about being flooded again from the sea. Having it down there reassures them because it’s visual. They can see the history.” (Former Chair, Canvey Community Archive)

The regeneration of the seafront area with its improved amenity value has begun to pay dividends for the local economy, with a small but noticeable growth in the local tourist trade.

Through its involvement in the project (as well as the wider seafront regeneration), the Friends of Concord Beach has raised its profile significantly on the island, with its Chair a well-known community activist and local councillor.

“It’s bolstered their sense of achievement and their authority as an organisation. This is something very visual and permanent they’ve put together themselves. It’s bolstered community interest in the Friends of Concord Beach, the role that a community organisation (not the local authority) can actually play.” (Mayor)

Partnerships

The Friends of Concord Beach benefited from partnerships – some formal, some less formal – with the following organisations and groups:

- The Canvey Community Archive which provided vital archive material to inform the design and content of the mural
- An informal team of local artists who undertook the work and stimulated volunteer help in creating the panels of the mural
- The Concord Cafe which acted as a source of moral support for the mural project, and an important mechanism for publicising it through distribution of the brochure about the mural
- Key elected members (Westminster MP, and Castle Point Borough Council) who provided moral support and vital links to funding.

Sustainability

The mural project demonstrates a high level of community commitment, with the enduring physical legacy an important sign of this.

“Everyone has got a perception of Canvey, but the fact that it hasn’t been touched or vandalised speaks for the people. There hasn’t been any ‘what’s the point?’ or ‘why was the money wasted on that?’” (Artist)

Plans are in place for one of the original artists who contributed to the mural to maintain its physical upkeep on an annual basis. Since the creation of the initial mural, two more panels have been produced – one depicting the downing of two B17 bombers in the Second World War, and one celebrating Dr Feelgood – ‘the best local band in the world’.

The enhancement of the seafront area at Concord Beach has stimulated further amenity improvement a little way along the coast. A group called 'Baywatch' has taken on the task of maintaining a small bay area.

“A group of people got together to clean up a bit of beach. Because it's in a bay you get an awful lot of rubbish washed up. It got cleared periodically. A group of people go down there religiously every week. That beach is absolutely superb. They've now commissioned benches.” (Former Chair, Canvey Community Archive)

confab: 'Roma and Scottish heritage through music and song'

Project summary

The project worked with Roma and other Scottish people using music as a tool to facilitate awareness raising about both Roma and Scottish traditions between the communities. Music workshops were run over a three month period in the Govanhill area of Glasgow, using traditional music and song as a starting point for discussions around the heritage of each community. The process was facilitated by a Music Facilitator and a Roma Community Consultant. The inter-cultural band E Karika Djal (moving wheel) was formed from the workshops, and four performances were given in community and commercial venues around Glasgow. The band now continues as a viable enterprise. The grant award was £9,000.

People interviewed (n=5)

- Music Facilitator
- Roma Consultant
- Artistic Director, conFAB
- Musician
- Programme Manager, 'Stereo' club (Glasgow)

Process

The Artistic Director spoke positively about the value of the 'expression of interest' stage to the application process with HLF. This allowed conFAB to test out their ideas and to ensure there was a sufficient focus on heritage.

"If we hadn't gone through the EOI process we wouldn't have got the funding."
(Artistic Director)

She saw the Outcomes Framework as a helpful tool, providing an important element of clarity.

"Overall it's an interesting process. We're a project funded organisation, doing about ten projects a year and they range in scale and size. It's much easier to develop an application when people are clear what they want." (Artistic Director)

The process of developing the project was enhanced by the pre-existing relationships with staff working in the local community organisation (Crossroads). This provided trust and credibility with the Roma community.

"I used to run Roma drop-ins, streetwork. I was the community engagement worker. I was working with the community and inviting people to rehearsals." (Roma Consultant)

Outcomes

The project was able to demonstrate that it delivered against all three sets of outcomes - heritage, people, and communities.

Outcomes for heritage

The project led to the participants developing an improved understanding of their respective heritage. Interviewees described an organic process in which the Roma and the Scottish folk musicians, working to a fairly tight timescale, began to interpret and explain their respective musical traditions.

"Music was the ultimate language and people started to speak through music. One person would play something and the other would play something different. They began to appreciate how they would express themselves through the music." (Roma Consultant)

In turn this led to an appreciation of their broader Roma and Scottish heritage.

"They had to learn each other's culture and music. It was quite hard with the pronunciation, but it happened naturally." (Music Facilitator)

Outcomes for people

A range of skills were developed by participants in the course of the project. Principal among these were musical skills. One Roma musician was able to re-assert his expertise as a musician.

"He was a musician all his life and this was like a peak for him to perform with this project. In Slovakia he was a musician, but he came here and was employed in a chicken factory. He had all these negative experiences and was suffering from depression. When we got him involved, he changed completely. He was beaming, he was talking about it, and was planning to do something with dance. He was a stalwart of the band." (Roma Consultant)

Another musician described how he 'fell' into the management of the band, and began to develop some of the requisite skills.

"It's a new experience, a great experience for me. Having to deal with the managerial side." (Musician)

His role was crucial in holding the band together.

"I was kind of the glue to the band. I speak the Slovakian and Czech languages and was able to translate in the band. There were a lot of doubts about it, whether we'd make it. But in the space of two or three weeks it started to sound like a band." (Musician)

Learning about both Scottish and Roma cultures continued throughout the project.

"The band is about trying to integrate musical styles. It's got its place in Scotland. The Scottish folk music element with the Roma music is our advantage." (Musician)

The Roma Consultant set out the social background to the project, and how the attitudes of both Roma and Scottish people changed.

"The band is breaking all myths because the Roma community is traditionally one of the most isolated communities, discriminated against and all that. Coming to a new home country - it doesn't matter whether it's Spain, Italy, France or the UK - people

come and tend to live in groups. They kind of create a community within a community. And it happened in Govanhill. They create a very close knit community and there is no need to learn a new language. Everyone is watching Slovak or Czech TV. There is no need to integrate. After E Karika Djal started to form, people started to visit each other, they became friends. Roma people are talking about it. It's OK to be friends with Scottish people." (Roma Consultant)

The social side of the project was a small but important indicator of change.

"There's mutual respect for musical ability and craft. And good friendships develop. When someone has a birthday party, they invite the other guys." (Musician)

In reality, a considerable amount of volunteer time was given to the project by the musicians. This was not without its challenges, as there was a not unreasonable hope that they might derive some income from the project.

"It's quite patriarchal and a society ruled by men. The concept of volunteering is quite difficult to understand. It's a tricky one. At the beginning they were quite articulate how much they were going to be paid! If you grew up in poverty, and there's something you can do, you want to be paid." (Roma Consultant)

"It's difficult. Music is not a particularly great money maker. It's a kind of side income for the members - £50 to £60 per performance per head. Half of the band have a full time job. But especially the Roma, they don't have a job or have a very low income." (Musician)

Outcomes for communities

The project succeeded in making inroads into a sizeable yet isolated migrant community in Glasgow. The Roma Consultant was clear that the community faced considerable challenges.

"The community I was working with in Glasgow is coming from the eastern part of Slovakia. Slovakia is five and a half million people and about 240,000 are Roma. In 2007 there were about 2,500 - 3,000 people from the Eastern part of Slovakia. They used to say the elderly stayed at home to look after their houses. The rest came to Govanhill! They started to come in 2004 with the expansion of the EU. 2007 was the year there was all kinds of people trafficking and sexual exploitation." (Roma Consultant)

Music as an expression of a cultural heritage was a powerful tool to address some of these barriers.

"Music is a universal language that is breaking boundaries." (Music Facilitator)

The fact that this fed through into social media meant that a wider audience had access to these small cultural insights. It became routine to upload videos of the band practising on Youtube.

"Everyone's just posting things on Facebook. When we rehearse we make videos. It gets posted and gets 100 likes immediately." (Musician)

This impact was described in different ways by three people involved in the project.

"The main legacy from my point of view as a community worker is that they're breaking these stereotypes and myths that Roma people never engage or integrate, that they keep themselves to themselves and all that. All of a sudden you can see people who are out there who are just like you or me, and it doesn't matter that you're Roma." (Roma Consultant)

"It had a hugely positive impact within the Roma community. Where they come from in Eastern Slovakia, they're very used to being excluded from mainstream society and discriminated against. They're quite an insular society. They come from two villages which makes it worse because they have no need to integrate. In eastern Slovakia they're the only people with a different skin colour, and they stand out. In Govanhill they don't stand out at all!" (Artistic Director)

"When there's that kind of representation from that culture, it's helpful in the climate when there's less positive reports about their culture." (Programme Manager, Stereo)

Partnerships

The project was led by conFAB - an arts organisation - and they worked closely in partnership with Crossroads (a community organisation serving the needs of the Gorbals and Govanhill areas of Glasgow). This collaboration was essential in offering a trusted 'route in' to the Roma community. conFAB also worked with a number of community and music venues in the city, including the Glad Cafe, the Victoria Halls, and Stereo. The Programme Manager from Stereo (where the final performance of the project took place) was enthusiastic about the project and keen to do more with the band.

"The December event went well. There were 50 - 60 people - which was a good attendance for that kind of gig midweek. There was a good mix and some new faces." (Programme Manager)

Sustainability

E Karika Djal has now established itself on the Glasgow and wider Scottish folk music scene, performing two or three times a month in the spring and early summer period in 2015. It has plans for the future.

"We've got very interesting ideas to mix Scottish songs with old Roma and Indian songs. The ideas are quite bold at the moment." (Musician)

conFAB is using the experience of the project to develop a further Roma project, and are planning to apply for another Sharing Heritage grant.

"I'm in the process of developing another application to Sharing Heritage. It's different but connected. We'll do some workshops with the Roma community based around traditional music and dance - leading up to a festival. E Karika Djal will be part of it." (Artistic Director)

Staff at Stereo see the value of this type of initiative as a way of building new and cross-cultural audiences, and are supportive of what E Karika Djal are doing.

"Arts venues should be facilitating the positive representation of diverse cultures, as opposed to the negative ones you see through the press. We're living in a cultural climate where people's feelings about their identity become polarised. The best way to deal with it is to share stories." (Programme Manager, Stereo)

Crighton Carbon Centre: 'Carbon Busters schools clusters project'

Project summary

Carbon Busters schools clusters project is an awareness raising and skills improving programme, specifically designed for a school cluster (a secondary school and its associated community of primary schools) to engage pupils and teachers with sustainable development education, focusing on their local natural heritage and the immediate outdoor environment within their school grounds and gardens. The project worked in 22 schools with 696 pupils (553 primary, 143 secondary) and 67 teachers in two school clusters over a 12 month period. It was primarily delivered through pupil workshops and teacher training, focusing on topics including food, water, energy, biodiversity and waste with practical activities including biodiversity surveys and conservation on the school grounds and in individuals' gardens. Each participating school created an action plan to be implemented by the pupils and staff, encouraging the whole school and the wider community to carry out practical actions and measures that will help preserve, conserve and improve the natural heritage. The grant award was £10,000

People interviewed (n=6)

- Principal Teacher, Carrutherstown Primary School
- Teacher, Carrutherstown Primary School
- Project Coordinator, Crighton Carbon Centre
- Education Development Officer/Learning for Sustainability Officer, Dumfries & Galloway Council
- 2 local specialist educationalists
- A composite class of 11 P5 - 7 children was observed participating in the programme at Carrutherstown Primary School.

Process

The Carbon Busters programme which ran during the school year 2013-14 funded by Sharing Heritage, had previously been piloted and developed by the Crighton Carbon Centre. The Centre has also secured a second Sharing Heritage grant to extend the work from August 2015 to July 2016.

Outcomes

There was evidence that the project delivered against all three sets of outcomes - heritage, people, and communities.

Outcomes for heritage

The programme actively engaged children in improving their natural heritage. As the local specialist explained:

"We do biodiversity with some schools who've got the grounds - planting native trees such as hawthorn, rowan, crab-apple. And we do things that will attract animals to your playground, like bug hotels and bird feeders." (Local specialist)

The programme was also seen as linking to the 'Eco schools' programme and an associated award. Carbon Busters was cited as having helped one primary school achieve the award.

"It's quite encouraging for the schools to understand why they might be re-cycling or reducing energy costs. It fits with Eco schools. It supplements that scheme. Each year they're assessed on what they're doing for the environment. They're grateful we supply them with materials that help them get the award. We always say 'tell the assessors about the work you've done through carbon busters'." (Project Coordinator)

Outcomes for people

Interviewees all emphasised how important it was for children to understand and care for the natural environment. Several mentioned that, even though the Crichton Carbon Centre was located and operated in rural south west Scotland, their experience indicated that children have lost touch with their natural heritage. There was considerable evidence that the Carbon Busters programme impacted on children and young people's understanding of climate change, and how to conserve and preserve their natural environment.

Through the programme, children in schools have developed practical skills in planting trees and seasonal fruit and vegetables - and enjoyed the experience! The practical nature of the work also contributed to their communication skills.

"Getting out into the fresh, getting them to be in touch with nature. Teaching them actually how to plant a tree and the reasons for planting trees. While we're planting a tree we talk about the fruit you see in the supermarket and where it's come from, local varieties and why it's important to have local heritage varieties. And actually getting them digging. Within minutes they're right in there. Quite often they don't have the right gear on - fancy socks and so on. They get on with it and always want to come again." (Local Specialist)

This gave rise to learning about natural heritage on a local and global level.

"The pupils know what's happening globally environmentally. They do have a good understanding of climate change since the workshops, and also the skills for planting and growing vegetables. For example Fort William Primary did planting in the school grounds. And these skills are useful for the gardening they do at home. We also did some tree planting. We took the children outdoors to work on environmental solutions. This links to the HLF outcomes that people understand their local natural heritage." (Project Coordinator)

The fact that the programme fits with Scotland's Curriculum for Excellence is a strong advantage. Its cross-curricular focus means it has relevance to learning in a number of subject areas.

"Obviously with the Curriculum for Excellence, it's all about global issues - the focus is on looking after our environment, not just locally, but globally. So the Carbon Busters coming in covers a lot of what we would want to teach the children. And the way she delivers it fits in with the way we would deliver the curriculum." (Principal Teacher)

"Staff have a lot of pressure on them as regards delivering Curriculum for Excellence outcomes. The Carbon Busters project provides a good way of delivering on a vast range of outcomes, whether those be literacy or numeracy outcomes, but are much

more likely to be science outcomes and health and well-being. All these kinds of things are embedded in the programme. Having spoken to staff who've been involved, the flexibility is quite important from our point of view. So if a school is delivering a particular theme - forests is one - the Carbon Busters programme is flexible enough to meet the needs of specific schools. There's dialogue between the project and the school. It's not a one way street." (Education Development Officer/Learning for Sustainability Officer, Dumfries & Galloway Council)

Evidence from the online survey carried out with participating classes before and after the six week Carbon Busters programme was able to demonstrate changes in attitude and knowledge in the children.

The programme was mainly delivered by paid staff, but two volunteer interns contributed time and expertise.

"The two interns both came from Dumfries & Galloway. They came in for a few weeks to help with some research on the pupil surveys, comparing the data from before and after the pupils did the workshops." (Project Coordinator)

Outcomes for communities

The prime focus of the project was on helping pupils reduce negative environmental impacts and enhance the natural environment. However, interviewees also described how the programme also had a wider community impact.

"There's a spin off into the community. When you have a gardening club you have grannies, granddads, people in the community who come and help in the garden after school." (Local specialist)

As a result of the Carbon Busters programme, people described how the Crichton Carbon Centre has been strengthened as an organisation. Carbon Busters was the Centre's only youth programme, and this gave it particular value. The work has raised awareness about the role and work of the Centre more broadly.

"Across the region, it's raised that whole understanding of carbon issues and also of the Crichton. It's raised awareness of the Carbon Centre." (Local specialist)

The programme has also spawned a number of 'spin-off' projects, such as the 'Incredible Edible' project which involved planting food round the town of Dumfries.

Partnerships

The most important partnership was that which has been forged with schools across the region. The project worked with 22 schools in the Annan Academy and Douglas Ewart High School clusters in the year funded by the Sharing Heritage programme. A level of trust and co-working has developed, with the extended nature of the intervention valued by teachers.

"Quite often we get one-off people who come in for an hour and then go off, and we never see them again. But the Carbon Busters is workshops over the six or seven weeks." (Principal Teacher)

The Education Development Officer described how schools were moving to a more 'bottom up' approach, where the schools themselves approach the partner organisation. There was evidence of increasing interest in the natural environment among schools.

"I work with a wide range of schools across the authority, and we have an increasing number of schools approaching me, interested in things like school gardens, the development of outdoor spaces to include food production as part of their school grounds development." (Education Development Officer/Learning for Sustainability Officer, Dumfries & Galloway Council)

In addition to this, the Carbon Centre has been asked to act as a formal external partner in a number of school bids to Education Scotland's 'Food for thought' programme, focusing on healthy eating. Two schools, Locherbiriggs and Cummertrees primary schools have been successful. This type of partnership was going to become a more common occurrence.

"It's definitely been a contributory factor to the raising of awareness of these issues within the schools the programmes have been delivered to. Schools will be expected over coming years to deliver, and to have viable partners certainly makes the delivery of learning for sustainability significantly easier and more effective, and a better learning experience for the children." (Education Development Officer/Learning for Sustainability Officer, Dumfries & Galloway Council)

Underpinning the partnership with local schools was the partnership established with the local authority. There was a good working relationship between the Carbon Busters programme Coordinator and the Education Development Officer, who cited how Carbon Busters would be contributing to national policy objectives.

"The 21 recommendations of the 'One planet schools' report in 2012 were accepted by the Scottish Government, and there's now an expectation within schools across Scotland that they do what they can to deliver on that. As a result, programmes like this support this." (Education Development Officer/Learning for Sustainability Officer, Dumfries & Galloway Council)

Sustainability

The programme took seriously the need to demonstrate sustainability, and it has taken a number of measures to achieve this. In order to ensure that the programme takes root in participating schools, teaching materials are provided on a USB stick for teachers so they had full access to the programme's resources. 85% of teachers say they have used these resources. There were also 12 teacher training sessions held for staff on the content and methodology of the Carbon Busters programme.

As a result of its work on the programme, the Crichton Carbon Centre was now about to embark on a pilot CPD course in Aberdeen. This was approved by the GTCS (General Teaching Council of Scotland) and is to be delivered in partnership with the Royal Highland Education Trust, the Soil Association, Queen Margaret University, and SRUC (Scotland's Rural College).

With the further HLF Sharing Heritage grant, the Carbon Centre will develop the Carbon Busters programme in other schools in the region.

Earth Trust: 'Introducing water for life'

Project summary

The 'River of Life' is a major long-term initiative by the Earth Trust to re-create a 37 hectare wild stretch of wetland along 2.5km of the river Thames, with the intention of safeguarding threatened wetland wildlife, improving water quality, and changing the relationship that society has with water, wetlands and wildlife. The 'Introducing Water for Life' project aimed to engage people, schools, and local community groups in discovering and sharing the heritage of this stretch of the river during the initial phase of 'River of Life'. Following an engagement event on the site in March 2014, four local primary schools took part in full day events on the site, exploring the heritage and history of the river. Four community consultation events were held in four local towns and villages, including the use of a questionnaire survey. The project culminated in the first ever Autumn Water Festival. The grant award was £9,200.

People interviewed (n=4)

- Head of Research and Skills, Earth Trust
- Development Officer, Earth Trust
- Teacher, Benson Primary School
- Volunteer
- The visit also included a 2 hour tour of the 'River of Life' site.

Process

The Head of Research and Skills at the Earth Trust was not in post when the Sharing Heritage application was submitted to HLF. She mentioned that it was not always clear why HLF had selected certain outputs under the 'approved purposes' set out in the grant award letter.

Outcomes

The 'Water for life' project was able to provide evidence of delivery against all three sets of outcomes - heritage, people, and communities.

Outcomes for heritage

The 'Water for Life' project was the pilot project which aimed to explore the most effective ways of engaging people and communities in the long term development of the 'River of Life' wetland site which has 200,000 visitors each year. The project has provided important insights that helped shape the management of the site and its heritage. The community engagement events provided vital data on how people want to use the site. These included suggestions for bike lock-up areas, the development of 'apps', a kayak point, bird observation hides, QR codes, and 'geo-caching'.

One of the volunteers described how he had made a contribution to the interpretation of the natural heritage of the site.

"I wrote a piece in the local parish magazine featuring Earth Trust activities, and I did two or three talks to the local primary school in Warborough - talking about natural history and ending up with a plea to visit the Earth Trust. The teachers were really up for it. I know they did one trip. I also did a couple of presentations at the Oxford

Ornithological Society. I wouldn't have done these if I hadn't been involved in the Earth Trust." (Volunteer)

His volunteering experience also included an important contribution to recording the natural heritage through noting the features on an agreed mapped-out area (transect).

"I was invited to walk a transect. It was quite a complex one - from Shillingford Bridge Hotel along the river frontage for three and a half to four miles. I did it about half a dozen times in the first year." (Volunteer)

Volunteers were also involved in other data collection and entry tasks as part of the project. One of the volunteers commented that there are already improvements to the wildlife habitats on the site.

"We're seeing increased fish in the tributaries. There's already a payback!" (Volunteer)

Outcomes for people

Engagement in the project created opportunities for participants to learn about the natural heritage of the area and to develop their skills. This applied to the volunteer team who benefited from the symbiosis with another HLF project 'Stepping into Natural Heritage', currently running at the Trust until 2016. This project employs a Volunteer Engagement Officer who, amongst other duties, coordinates training courses for volunteers. These cover a range of conservation techniques, including hedge laying. Volunteers from the Sharing Heritage project were able to take part in these.

A teacher of a class who took part in the schools events on the site was enthusiastic about the Earth Trust's approach to learning.

"They spoke about the need to take care of the habitat. The children loved the tree that had musical notes coming from it! They also incorporated poetry, story writing, artwork into the day as well. The cross-curricular approach was great." (Teacher, Benson Primary School)

Children who took part in the project also developed skills. Sometimes this was an introduction to traditional craft skills such as charcoal making. On other occasions, through the Trust's partnership with Earthwatch, children were able to connect local and global issues, and develop scientific skills.

"It's one thing to say to the children 'we're going to measure the water quality of this pond'. But if you say 'we're going to this pond and we're going to upload the data onto a global data set, and you're going to see your data point on a global map', it sets the students excitement at a whole new level. They're generating real scientific data." (Earth Trust)

The Earth Trust sees one of its key roles as changing attitudes to the natural environment. They pride themselves on using positive messages to achieve this.

"That's what sets us apart at the Earth Trust is our unique approach. A lot of environmental organisations are negative messaging focused, and there's growing scientific evidence that this is not having an effect." (Earth Trust)

The Trust's engagement process has three stages: 'Get out and have fun' (activities such as festivals and events); 'Get connected and explore' (opportunities to take part in training courses or volunteering); 'Do something about it' (more intensive specialist activities). Enjoyment has to lie at the heart of the experience however.

"For us that's the key element of what we do and how we engage with the public. We change hearts and minds by generating fun and engaging opportunities and events." (Earth Trust)

Volunteers were involved in helping with all the main elements of the 'Water for Life' project.

"We had volunteers helping out with all the engagement sessions - the initial session in March, with the school sessions, with the community engagement sessions. Then we had volunteers helping out at the Autumn Water Festival." (Earth Trust)

Volunteers also played an important role in the 'citizen science' aspects of the project.

"We focused the volunteer time on the biodiversity component. For example we have volunteers taking bird surveys, invertebrate surveys, and water quality as well. Also I've had volunteer carrying out phase 1 mapping - a simple way of mapping the site. Another volunteer put all this information onto a GIS layer." (Earth Trust)

A significant number of volunteers were recruited through the project.

"The volunteering has been quite broad spectrum - from the biodiversity to the digital. We recruited new volunteers though this project - probably about 35." (Earth Trust)

The involvement of volunteers has also clearly increased the capacity of the organisation to carry out its tasks.

"The volunteers - that's the bottom line. There's a shift change in capability when you can swell your volunteer numbers, particularly in terms of the biodiversity monitoring - assistance with the bird and butterfly surveying, and the water quality." (Earth Trust)

Outcomes for communities

The overall focus of the project was on appreciating the natural wetland environment and encouraging people to make more responsible use of water. In doing this, the Earth Trust sets a premium on reaching a wide and diverse audience.

"We're not looking for the 5% of the population who are already engaged in these issues. We're looking for that 95% really that are just everyday people that, for whatever reason, haven't been engaged... One of our take home messages, for example, was 'turn the tap off when you're cleaning your teeth!'" (Earth Trust)

200 questionnaires were completed by members of the public as part of the consultation process, which took account of a variety of engagement styles and preferences.

"There was an older spectrum in the audiences who were saying I just want a leaflet. I don't have a phone. I don't know what a QR code is. And websites - I don't go there... Everyone's charging forward with the modern age. We have this massive cross spectrum of society that we need to remember aren't engaging in the new technologies. It was a really useful reminder of that." (Earth Trust)

There was also particular value in engaging people with disabilities.

"We had some disabled individuals coming to these events and it was an exceptional insight into how they would like to access these areas." (Earth Trust)

The Head of Research and Skills at the Trust believes the project has the potential to impact long term on the local economy. She has met the manager of the famous local hostelry which is located immediately adjacent to the wetlands area, and he has already noticed an upturn in custom as people increasingly make use of site for leisure purposes. A 10K sponsored run in aid of the Trust had just taken place, passing by the hotel. The Trust also offers business 'incubator' support to its 'Farm Step' tenants who lease facilities to run a variety of agricultural enterprises on the site.

Partnerships

Under the EU 'Water Framework Directive', the catchment area of this part of the Thames failed on water quality and fish breeding areas. This was the factor that led to the collaboration with the Environment Agency as a key partner.

At a more local level, partnerships were developed with local schools through the consultation process. 131 primary school pupils at Key Stage 2 from four primary schools along the Thames took part in this.

"The idea was to have to have four schools that were aligning the Thames itself.... We wanted to inspire the children in this landscape, to give them an option to be completely immersed....These schools have come back to us on numerous occasions. They love the site." (Earth Trust)

Links were established with the Higher Education sector. Paul Whitty, Professor of Composition at Oxford Brookes University became involved through the initial engagement event, where he used a hydrophone and a geophone to channel sounds from the natural environment through a double bass!

"People knew him as a composer. Some people had followed him through music events and were then drawn down to this landscape." (Earth Trust)

Students will be involved in a sound mapping exercise later in the year.

"I'm setting the Earth Trust up as the prime location to bring higher education students for site visits. We have three different groups coming from Oxford, and geography students coming from Brookes, and Royal Holloway as well." (Earth Trust)

Locally, a close working relationship has been built up with the Hurst Water Meadow Trust which is run by local volunteer natural history experts. The partnership with Earthwatch, a scientific organisation specialising the use of 'citizen science' approaches to monitor environmental conditions, was developed as a direct result of the project.

Sustainability

Long term environmental sustainability was central to the 'Water for Life' project, with all its activities geared towards this. The Earth Trust see this pilot project as having laid the groundwork for phase three of the 'River of Life' initiative, and believe that the community

consultation process has helped them garner the public's views, test out models of engagement, and sow the seeds of interest in the site among both adults and young people locally. The establishment of the Autumn Water Festival as a permanent feature in the annual calendar is emblematic of this.

"It was such a brilliant success that we've decided that we're going to retain the Autumn Water Festival as the Autumn Water Festival and sustainable water play, which I think is a fantastic legacy of the [Sharing Heritage] project - that it's made a shift change in one of our four annual festivals." (Earth Trust)

The Earth Trust hoped that by engaging children through schools, a link would be established with parents, thereby disseminating learning to a wider constituency. This had been the case for one of the classes which took part in the school engagement programme.

"It was the first time for everybody. Some had been to the Centre before but not to the river. One child took their parents the weekend after. Other children have gone back for birthday parties." (Teacher, Benson Primary School)

This teacher also said that an annual visit to the site would form part of the curriculum from next year to support the study of rivers.

Kirkbymoorside History Group: 'Not lost but gone before'

Project summary

The project, led by Kirkbymoorside History Group, preserved and restored 17 sandstone tombs and gravestones within All Saints Churchyard in Kirkbymoorside. The stones selected reflected various aspects of the town's history and were all in the areas of the churchyard used by the town as communal space. Restoring these stones visually enhanced the area and increased enjoyment for visitors and residents alike. Alongside the physical restoration, they worked in partnership with the local primary school to research the life stories and events related to the gravestones, linking the past and present, engaging the schoolchildren in recording these ancestors and learning how these former residents contributed to the town as it is today. They had the support of the Church Authorities and liaised with existing family members and gained their support. They used local craftsmen who were passionate about preserving the heritage and working with old stone. The research was made available as a timeline on the community blog, a final exhibition in the town, and a printed booklet to ensure the information is archived. The grant award was £6,600.

People interviewed (n=13)

- Chair, Kirkbymoorside History Group
- Treasurer, Kirkbymoorside History Group
- Secretary, Kirkbymoorside History Group
- 4 members of the Kirkbymoorside History Group
- Member, All Saints Church, Kirkbymoorside
- Teacher, Kirkbymoorside Primary School
- 4 pupils from Years 5 and 6, Kirkbymoorside Primary School

Process

The Kirkbymoorside History Group was new to the Sharing Heritage programme. Indeed they had very little experience of grant applications at all. As part of their preparation, they went to an HLF open event locally. This led them to review the 'learning' aspect of their proposed project.

"We went to have a chat at one of their open events. They made it clear that it's doing and learning. 'We'll pay you to do something but somebody else has got to learn from it'. It was like - who do we pick, who's interested in learning? The children are the obvious ones we want to get into the background and heritage of the town. They're always keen to try things that involve the outside and getting mucky and wet!" (Kirkbymoorside History Group)

They then approached the head teacher of the local primary school, and the teacher who ran the history club in the school (and was a volunteer at the Fyedale Folk Museum) became involved.

It was the first time they had undertaken something of this scale, and they felt somewhat daunted.

"This was our first big project. The stones were the first time real money was involved. It was scary. No-one wanted to take on the work." (Kirkbymoorside History Group)

Outcomes

There was evidence that the project delivered against all three sets of outcomes - heritage, people, and communities.

Outcomes for heritage

The project focused on the restoration of 17 graves and monuments in All Saints churchyard in Kirkbymoorside, and this refurbishment of the physical heritage was central to the project. Special permissions were needed from the church authorities and these were duly secured.

"The church tried to find relatives to pay for them, but they were long gone! We did put some publicity out to see if anyone wanted to talk to us, but the trouble is everyone knew if they came to claim the stone, they'd end up with the bill for the stone! We only found relatives after we'd finished." (Kirkbymoorside History Group)

Finding a builder or stonemason who would take on the job was a challenge, not least due to the difficulties of using heavy machinery in an area with restricted access. A selection of graves were chosen in different parts of the graveyard, with varying stories to tell. One of the graves they chose was of a young girl 'Gwennie', and this led to an unexpected connection with her family.

"It was not just the wealthy ones. We looked at the fallen stones to see which were interesting. Some were picked because of the carvings, one or two we picked because they were prominent in the churchyard... We selected a small stone cross for a child. We re-built that one completely. She's sort of been resurrected. Everyone knows Gwennie now on the corner. We managed to find some relatives through Ancestry. A lady who was researching that family tree got in touch, she didn't even know that child existed. When she died, the family upped sticks to York. We kind of brought her back to her family." (Kirkbymoorside History Group)

The project concluded with a final exhibition and the production of a small booklet about the project, six copies of which were sent to the British Library. They also developed a website¹⁵ to carry information about the project.

"Doing the lottery thing, we had nowhere to showcase it, to tell people about it. We didn't have a Facebook account or a website. As a result of this project we thought it was a shame. All this work and effort. So we created a community website, and there's a page on this project." (Kirkbymoorside History Group)

Outcomes for people

There was a core group of 12 - 14 pupils from years 5 and 6 in Kirkbymoorside primary school who participated in the project. They were all in the history club and came down to the church most weeks after school over the course of a term in order to clean the gravestones and to record what was on them. Although serious work, there was often a light-hearted element.

"They came up after school for their history club, and they read the stones, did the scrubbing so you could read the inscriptions. It sometimes ended up in water fights!" (Kirkbymoorside History Group)

¹⁵ [Kirby Moorside History Group website](#)

The young people learnt about the heritage of their town, and derived particular value from the inter-generational nature of the experience.

"The best thing we got out of it was working outside the school in the community so they learnt about their community and made contact with a group of people they wouldn't normally associate with. They found they could talk with older people and discover they had things on common with them.... They were fascinated that people had so much knowledge about what went on in Kirkby and the fact that you could find out about the names on the gravestones - where they lived, they became more than a name... And they got to work with other people outside in the community, which, for us, was brilliant, because it wasn't just children with children." (Teacher)

Some sophisticated lessons were learnt by the children.

"One of my big things is evidence - I used to be an archaeologist. It's easy to stand up in front of a class and say 'this is how it was', but I always say 'how do you know that?'. It did bring home to them that we need evidence, you can't just make generalisations without a basis." (Teacher)

"One of the volunteers taught them how to draw to scale. They had graph paper and drew them to scale, so we got some maths out of it as well!

The whole project was dependent on volunteering. As the chair of the History Group said:

"We're not a history group that gets speakers in. We're a history group that 'does'. We're not a money making organisation - everything is voluntary." (Kirkbymoorside History Group)

The commitment of the pupils was also, importantly, a voluntary one, with considerable time being devoted to the project in the course of the year. Other people, including members of the congregation became involved on an occasional basis.

"If we get people involved in a small task, they feel they can undertake that. Committing to doing a book or a project is beyond what they think they can do. But as 'ad hoc' help, people feel they can do that. You need to get creative about how to get people involved." (Kirkbymoorside History Group)

Outcomes for communities

The project succeeded in working with a wider and more diverse audience than might be expected for this type of project. It was effective in drawing in a younger age group - one not traditionally associated with ecclesiastical heritage! Also, as a result of work that the group was able to undertake on a grave belonging to a member of the local Romany community, trust was established with this group. A project was now being developed with the Romany community in Kirby Mills.

"We've now got the support of the Romany community. They're now keen to work with us. It's very hard to get an 'in' with these tight knot communities. They've got to trust you, and you've got to know where the boundaries are, and how to work all these long forgotten family feuds. We selected that gravestone to fix it for them. We're doing a project on Kirkby Mills which is a separate hamlet and was always Romany families living down there." (Kirkbymoorside History Group)

Members of the History Group were forthright about the impact of receiving the Sharing Heritage grant. It had, in effect, significantly raised their credibility among the local community.

"Taking on the Lottery, we were given some kind of recognition as well. We weren't just a bunch of amateurs. A lot of people were surprised how professional looking our final exhibition was. They'd obviously had a different view of us up to that point. That led to us booking the meeting room every alternate month for an exhibition. We were suddenly taken more seriously. People stop us in the street and say 'you're doing a good job'. People are coming are coming to me now with old photographs and documents. They never used to before." (Kirkbymoorside History Group)

Their changed role in the community was exemplified in the account of how a local 'character' had passed away, impecunious and with no relatives. The History Group took on the task of raising money for the funeral and coordinating arrangements for it. The resulting large attendance reflected both the community's fondness for the person concerned, but also the extent to which the History Group was trusted to play a role in civic life.

The Group summed up the impact of getting the grant.

"It's the knowledge that we can go for something a bit bigger. You read about all these Lottery grants and you think it's a lot of work. We've proved we can do something bigger than just a book. It's given us the confidence to go for a second Lottery grant, which is a big step for a small group. We've got the confidence of the local people." (Kirkbymoorside History Group)

Partnerships

The Kirkbymoorside History Group is a small local association composed of committed volunteers. Their experience of the Sharing Heritage project was importantly one of forging partnership. They discovered the value of creating alliances and making common cause with other likeminded groups and bodies. This was not always straightforward but was felt to be worthwhile in the long term. Formal (and less formal) partnerships were formed with: the primary school, the church, the local builder who carried out the maintenance work, and Ryedale Folk Museum.

Sustainability

The outputs from the project - the 17 restored gravestones and their associated stories - are now visible for all to see and appreciate, either in person or via the website. It remains a moot point whether any further stones from the several hundred in the graveyard will be restored, but the church can now see what can be done through concerted community effort.

A new role has also developed for the History Group in the primary school, allowing them to continue to stimulate interest in local heritage.

"It led to History Group members coming into school and helping us with other topics. We did a topic on the Tudors and someone came in with some information on that. Louise came in to do our medieval topic, then Robin came to do the wartime. Because we've got the contact, people can say - I know someone who can talk about that. It's widened our use of history in school." (Teacher)

The project has also boosted numbers in the school's history club.

The History Group have developed plans to obtain a container and convert it into a base for a community archive in the town. They are waiting to hear if their Sharing Heritage application is successful!

Oxford Concert Party: 'Music and museums'

Project summary

Music and Museums was a music and writing project with homeless adults in Oxford led by the Oxford Concert Party (OCP) in partnership with Crisis Skylight Oxford, the Old Fire Station, and the Ashmolean Museum. Homeless adults from Crisis Skylight attended an OCP performance of music from different cultures which responded to the museum's unique collection of artefacts from around the world. The project enabled a small group of six homeless participants to engage with the heritage of their own city, something from which they usually feel excluded. The musicians and writer used the museum's collections as a starting point for a series of eight workshops exploring the differences between people, lifestyles and cultures – making comparisons with the participants' own experiences. A booklet and a CD of the project were produced. The grant award was £7,700.

People interviewed (N=7)

- Director, Crisis Skylight Oxford
- Former Arts Coordinator, Crisis Skylight Oxford
- 2 musicians, Oxford Concert Party
- Poet
- Education officer (adults and young people), Ashmolean Museum
- Volunteer
- Email contact with Associate Dean (Student Experience), and Film Specialist, Oxford Brookes University

Process

Sensitivity to organisational processes, for example Crisis Skylight's regular use of the arts in its programmes, was seen as an important enabling factor, as was the quality of the facilitators.

Crisis Skylight also emphasised the value of flexibility and having an 'organic' approach to the project, permitting sensitivity to people's real needs.

“Projects work best when it feels like it's a group of people exploring something together – the learning goes both ways, a real sense of co-production. To work successfully with this client group, you must be flexible. People's lives change. The basics need to be attended to. If you're fluid people feel they can come back.”
(Former Arts Coordinator, Crisis Skylight)

Outcomes

There was evidence that the project delivered against all three of the HLF outcome areas - heritage, people, and communities.

Outcomes for heritage

The project developed an approach to exploring and explaining the heritage of the Ashmolean Museum to a new audience. One of the key challenges faced by the project was how to manage the heritage of the museum in such a way that it was attractive to people who would not normally 'darken the doorstep' of a museum.

“Part of my job is to work with community groups. I had, over a ten year period, worked with Crisis and the night shelter doing little bits of work with them. When Isabel and Arne approached me about this, I was keen to do it. We were already introducing music into the galleries. Instead of having it as an object you look at, have it as an object you listen to.” (Ashmolean Museum)

The project was, in effect, a kind of ‘outreach’ model of managing heritage. This involved a conscious process of taking artefacts out of the museum, and using them in other premises to stimulate discussion and activity. It was significant that the opening session of the project, with 20 people attending, was on Crisis ‘territory’, rather than at the Ashmolean. This meant that the project acted as a conduit to the museum, addressing some of the perceived barriers.

“There was something wonderful about being able to access the Ashmolean. Our service users don’t feel these parts of Oxford are as much for them as everyone else. There’s so much for free if you know about it and are confident enough.” (Former Arts Coordinator, Crisis Skylight)

There was a clear link established between the Ashmolean and Crisis Skylight. The workshops lasted for two hours and ran for eight weeks. An artefact from the museum provided the trigger for discussion each week.

“There were people who’d never written before, so we always start with a group poem. We word stormed, cut up the word and moved them around on the table. They ended up writing a poem about humanity.” (Poet)

This enabled participants to explore heritage through music and spoken word.

“If you’re talking about heritage, it isn’t some dry notion. You’re talking about humanity through the centuries, and what are the threads that run from the past to the present and into the future. It’s not a static thing. It can have a relevance to you if it’s introduced in the right way.” (Ashmolean Museum)

One of the service users offered to record and mix the music and poetry produced by the project. This was transferred onto a CD.

Outcomes for people

The skills of homeless people were able to be nurtured through the project.

“We were very aware that homeless people feel disenfranchised in every single way. But just because they’re homeless, doesn’t mean they’re ignorant.” (OCP)

As the project evolved, nascent poetry and musical skills were developed. One participant has now become a regular attendee at musical recitals at the Ashmolean.

“One of the participants played my keyboard and ‘gave a lecture’ on Russian piano music. When we first met him, he would hardly look you in the eye. And subsequently he comes to my recitals in the museum, bringing me an incredibly complicated piece of music to sightread!” (OCP)

The most striking feature was the growth in participants’ confidence and self esteem.

“It takes confidence and self esteem into the outside world. It’s the heart of what these projects do. They validate you and build your self esteem.” (Former Arts Coordinator, Crisis Skylight)

The facilitators felt that the project had opened up the museum to participants by providing 'bite-sized' introductions to its collections, interpreting them in ways that were relevant and enjoyable. This learning about heritage was central to the project. Crucially, the project fitted with the Ashmolean's ethos.

“Our strapline is ‘crossing cultures, crossing time’. And that’s what we tried to do with the objects. To illustrate the different ways cultures look at things.” (Ashmolean Museum)

The project provided an important route into heritage.

“A lot of people visit museums and don’t know where to start, because there’s so much. It gave an introduction and you’re able to explain in some small way the interpretation of what you’ve got.” (Ashmolean Museum)

The fact that some of the participants began to visit the museum on their own, following the project, was a small but significant change in behaviour. In turn, there was a knock-on effect with some of the staff at the museum, who began to view homeless people in a new light.

“Front of house staff, people in the galleries – everybody learns or absorbs something from dealing with different groups of people. As an institution, how do we respond to the homeless gentleman who falls asleep on the settee in the Randolph gallery every week? It’s about changing perceptions - not having preconceived ideas about visitors who appear a certain way.” (Ashmolean Museum)

The facilitators stressed the importance of utilising a flexible approach to maintain engagement and ensure that participants enjoyed the experience. The key was to treat people as equals. A measure of humility was required and the emphasis throughout was on the shared learning experience.

“Having the music, the literary end of things, the heritage stuff – people respond to different things. Having all of those things meant that there was something that would trigger participation in most of the people there.” (Poet)

For the facilitators, the process was a healing one.

“Singing and creating things together is enormously therapeutic. You come away feeling nourished.” (OCP)

There were a small number of volunteers, whose contribution was important. A 16 year old schoolgirl, who was planning to go on to study medicine, wanted some experience of being involved in a community project. She was a regular attendee, helping out with all aspects of the project.

Outcomes for communities

The project demonstrated ways in which a transient client group can become involved in heritage. The museum sector already sometimes struggles with public perceptions. When a

museum is located in one of the country's most ancient universities, the problem is further compounded.

“Most people know we're part of Oxford University, so people feel that's a place that's 'not for me'.” (Ashmolean Museum)

Exclusion sometimes follows.

“Creativity often seems limited to people with a roof over their heads. Homeless people are marginalised and overlooked.” (Former Arts Coordinator, Crisis Skylight)

The Ashmolean saw the project as integral to its attempts to become more inclusive.

“All this work with community groups and schools is to try and break down the barriers that people feel they may have. The Ashmolean has a certain reputation that goes before it.” (Ashmolean Museum)

The project seems to have impacted on how homeless people saw the museum.

“Clients would say: 'I wouldn't have dared come here on my own.' It's great to make it accessible to everyone.” (Director, Crisis Skylight)

All three key partners - the Ashmolean Museum, the Oxford Concert Party, and Crisis Skylight - were clear that they had derived important learning from the project. This had in turn fuelled future projects (see below).

Partnerships

The partnership which planned and delivered this project was an unusual combination of three organisations - embracing the music, heritage, and homeless sectors. As the Ashmolean museum commented.

“Our partnership is important. None of us could have achieved it by ourselves. It needed the various spokes to come together. It enabled us to do more than we would have been able to do on our own.” (Ashmolean Museum)

There was a clear understanding that the whole was greater than the sum of the parts. In particular, there was a value to the Ashmolean of being able to develop its 'outreach' function to priority target groups.

“My expertise is not in finding the groups we can work with. So working with partners who can find the people we need to work with is good. It makes best use of our time and enables us to expand what we do.” (Ashmolean Museum)

'In kind' support from partner organisations created the potential to 'lever' financial support from sources which would otherwise have been out of reach.

“The Ashmolean couldn't afford to employ these people to deliver that project. We can give my time and any material costs. That is where there is collaborative working. We would probably not get the funding if we applied for it because of the organisation we are. So we can be a partner, supporting in kind an organisation like the [Oxford] Concert Party who are more likely to get the funding.” (Ashmolean Museum)

Partners were clear that they learned from each other's skills.

"We're learning from each other's skills and we take these back into our own work."
(Poet)

The intention had been to involve students from Oxford Brookes University in the project. In the event, despite initial enthusiasm from staff, this did not materialise. The barrier appeared to be the challenge of aligning project and university timescales.

"The main issues we faced at the time were timing of the event and time of our staff and students. The problem with big projects is working them into the 12 work terms we have, which generally get very hectic in the last four or five weeks." (Oxford Brookes)

Sustainability

The partners were able to identify several areas of sustainability emerging from the project. For all of them, working relationships were stronger. The Oxford Concert Party had recently completed another project in collaboration with the Ashmolean, this time an intergenerational project using music, poetry and artefacts – working with older people and year 5 pupils from a local primary school, and funded through the Oxfordshire Youth Music Trust. This was explicitly based on the model established with the Music and Museums project.

The OCP also recognised the impact that the project had on their capacity and credibility when it comes to fundraising. An enhanced organisation CV stood them in good stead.

"They look at our accounts and who we've had funding from. It does have a knock-on effect." (OCP)

This was especially valuable in times of austerity.

"Sometimes it's hard to convince people what we do is valuable to society and communities in general. They say we haven't got money for that because we need to mend the potholes!" (OCP)

Crisis Skylight is planning to introduce a new class into their activities programme starting in September 2015. Entitled 'Out and about', this will be a learning activity focusing on visiting museums.

University of Reading: 'Oscar Wilde and Reading Gaol'

Project summary

The project aimed to commemorate the many private and public meanings of Reading Prison (opened in 1844, and closed permanently in December 2013), and to challenge the public perception of Victorian law and order. The Prison has iconic significance as the place in which Oscar Wilde served the majority of his prison sentence for homosexual acts. After his release in 1897, Wilde wrote campaigning letters to the newspapers about the imprisonment of children and the mistreatment of the mentally ill. He also wrote *The Ballad of Reading Gaol* (1898). The project featured an exhibition drawing on materials from the Berkshire Record Office, Reading Museum, and the University of Reading. These included the architectural designs for the prison by eminent architect, George Gilbert Scott, photograph albums of prisoners, along with notes on their stories; and literary manuscripts and correspondence. The project commissioned a high-quality photographic survey of the prison, which was also featured in the exhibition, and is preserved on open access at the Record Office for the benefit of the local community. Two short films were also made. The grant award was £4,300.

People interviewed (n=6)

- Director of Postgraduate Studies, School of Literature and Languages, Reading University
- Recruitment & Outreach Officer, School of Literature and Languages, Reading University
- Schools Outreach & Liaison Officer, School of Literature and Languages, Reading University
- PhD student, School of Literature and Languages, Reading University
- Widening Participation Director, School of Literature and Languages, Reading University
- Archivist, Berkshire Record Office

Comments were also supplied from the exhibition visitors book, and written feedback from participating pupils and teachers on the schools' day.

Process

The University was accustomed to applying for grants - mainly large scale research grants. However, they were also aware of the particular value to smaller community groups of being able to access relatively modest grants through the Sharing Heritage programme. The University is very conscious of the increasingly challenging funding environment (for example, citing the possibility that the Arts & Humanities Research Council may cease to exist shortly), and would be reluctant to see academic institutions no longer having access to this smaller fund.

Outcomes

The project delivered against all three sets of outcomes - heritage, people, and communities.

Outcomes for heritage

The overall purpose of the project was to bring to public attention the heritage of both the Reading Gaol building, and the histories of those who had been imprisoned there. There

was a feeling that its most famous prisoner had garnered the majority of the limelight, and some of its social and historical significance was yet to be appreciated. As the Berkshire Record Office put it:

"For me, the most interesting thing was beginning to change the narrative of the Oscar Wilde and Reading Gaol story - the basic tone of which doesn't seem to have changed for a hundred years. But we managed to put Oscar Wilde into context as just one of many men, women, and children passing through the gaol. I think the exhibition did that, and the schools event we did also made the gaol into a more 'real' place than a biographical entity." (Archivist, Berkshire Record Office)

A set of 386 photographs of the interior and exterior of the prison was specially commissioned by the project. This provided a unique record of the heritage.

"There's an awful lot of photographs and some of them give you a sense of the spaces. If they knocked down the chapel tomorrow, we would have an image of what it looked like when it was last used." (Director of Postgraduate Studies, School of Literature and Languages, Reading University)

The exhibition at the Berkshire Record Office, which was open to the public for three and a half months, attracted five hundred visitors, five times the number they would have expected for similar exhibitions. Comments from the visitors book are telling.

"Brilliant exhibition at the intersection of local and social history."

"Horrifying and fascinating. How fortunate we are to live in more tolerant times."

"It must have been a horrendous experience for Oscar and other inmates. Amazed that people were incarcerated for such petty crimes. All very sad, and thank God we have a much more enlightened approach."

"I've been interested in Oscar Wilde since I wrote my A-level history project on his stay in Reading Gaol and the 1898 Prison Reform Act. I hope the gaol becomes a museum."

"Very interesting and well put together. I shall certainly take an interest in the future of these historic buildings in the light of this exhibition."

Two films were made by the University - one focusing on the exhibition, and one focusing on Oscar Wilde's broader connections to Reading.

"We made a film with two of our students basically walking around Reading to places where there is still evidence of Oscar Wilde and his story. So we started at the prison and then visited the University of Reading special collections where we've rare materials that relate to Wilde and his circles. We went to the Records Office and the County Archivist got out the 'mugshot' albums and all that sort of thing. It was good having two young people drifting around looking cool!" (Director of Postgraduate Studies, School of Literature and Languages, Reading University)

Although it has 'scheduled monument' status, it is as yet uncertain what the future of the prison building will be. Reading Borough Council's outline Development Framework includes

reference to Reading University and the cultural value of the site. The University believes that the project has given a measure of prominence to the heritage of the prison. The coverage in national newspapers also helped.

"So whether it's the Guardian or a Reading Borough Council document, we feel as though we have managed to make people notice that people in the community attach great significance to the building." (Director of Postgraduate Studies, School of Literature and Languages, Reading University)

Outcomes for people

The University ran a one day 'master class' on Oscar Wilde and Reading Gaol at the Berkshire Record Office for A-level school pupils from four local secondary schools. 129 teachers from schools in Berkshire, Hampshire, Buckingham, and Oxfordshire were contacted, and such was the demand that within a day and a half, the 35 places were taken. The day consisted of lectures, seminars sessions, creative writing and a quiz. It clearly had an impact on the young participants.

"They were quite surprised by it, they were provoked. An element of it was quite disturbing for them. That's a very powerful experience when you can be transported into a whole different space and project yourself into it, particularly things like seeing the photographs." (Schools Outreach & Liaison Officer, School of Literature and Languages, Reading University)

This was echoed by the Director of Postgraduate studies.

"We hope that these images and ideas will stay with these young people for years and years. Whether it's a the memory of a picture of a child who looked like them who was banged up for stealing a rabbit, or whether it helped them make a choice about their degree or even going to university." (Director of Postgraduate Studies, School of Literature and Languages, Reading University)

The teachers who attended found it a productive learning experience.

"The day was informative. I thought the level at which it was pitched was perfect for our students in the sixth form."

"This was my first experience working with Reading Uni. I definitely will work with you again."

An aspiration of the project was to broaden people's understanding of life in a Victorian prison, and to change their perceptions of the social conditions that prevailed at the time. Comments from the young participants in the master class indicated that this had happened. When asked if the event made them think differently about any of the issues raised, responses included the following.

"The hard life of prison. How young people were imprisoned is different to now."

"I learnt a great deal of the conditions of Reading Gaol in the 1800s."

"It made me think more in depth about Victorian imprisonment and the themes of Oscar Wilde's work."

While most of the staff time devoted to the project was covered by the institutions involved, some volunteer time was given by the students involved in making the two short films.

Outcomes for communities

Interviewees felt that the project had been successful in attracting a wider and more diverse audience. The University's schools programme consciously aimed to widen participation, and one of the schools that took part was in the lowest quintile for uptake of higher education places. One of the schools also had a 20.8% rate of English as an additional language (compared to the national rate of 13.6%).

There was also some evidence that the profile of exhibition visitors was more varied than would normally be expected.

"They got a lot more people to the exhibition - they even had coach parties turn up which they'd never had before. And looking at the people and going through the visitors book, [the Archivist] had a strong feeling these were not his 'usual crowd', that it had brought people to the Record Office who had not been there before, which we're really pleased about." (Director of Postgraduate Studies, School of Literature and Languages, Reading University)

From the outset, the project was seen as a pilot for the University's schools outreach team, who were keen to widen participation within the university. Staff spoke enthusiastically about how the project had enabled them to develop both a model of practice, and specific links with schools

"The project coincided with the launch of our own school's outreach programme. It's become our best practice model because it was so full of rich resource." (Schools Outreach & Liaison Officer, School of Literature and Languages, Reading University)

Partnerships

Partnerships were strengthened and developed with a number of organisations and institutions. The collaborative nature of the project meant that the Berkshire Record Office was able to engage in a way that might otherwise have not been possible.

"For a small cultural institution of that kind, the idea of having a lot of schoolchildren in is very frightening to them, because they're worried about control, management, breakage. So to have people like [Schools Outreach & Liaison Officer] who have experience of the rules about food, drink, chaperonage - all the little logistical details they're not used to. That model of us and a small organisation joining together to make contact with schools ... they would never have done it on their own." (Director of Postgraduate Studies, School of Literature and Languages, Reading University)

The Archivist summed up the value from their point of view.

"I'm not sure there were any new partnerships at our end, though we did some good building on existing ones with the University, the museum, and the local media, and I guess the University got some schools outreach links." (Archivist, Berkshire Record Office)

The links which were established with schools in neighbouring counties were a major element of the project for the University.

"For me, the opportunity to interact with those teachers has been part of a wider conversation with teachers in schools where there is low participation in HE, learning about the context they're working in. We're working on more strategic and sustainable partnerships with schools." (Widening Participation Director, School of Literature and Languages, Reading University)

Reading Museum was involved and played an important role in loaning the prison's original key safe for the exhibition (one of the few large scale artefacts in the exhibition). They also assisted with designing and mounting the exhibition itself. Following the project, the Director of Postgraduate Studies (whose research on Oscar Wilde and his time in Reading Gaol had formed the bedrock to the project) was invited to give a lecture at the Museum as part of LGBT heritage month.

Sustainability

There are two dimensions to the sustainability of the project. Firstly, the learning about Oscar Wilde, Reading Gaol, and the social conditions in the Victorian criminal justice system have been made more widely and publicly available on a permanent basis. Resource packs have been distributed to a wide range of schools. There is now a high quality digital archive of photographs of the prison available for posterity. Two films, covering the project and the exhibition, are available on social media. Reading Borough Council's outline Development Framework also now includes reference to the heritage and cultural value of the prison building.

Secondly, the University has successfully used the project to build its capacity to reach out to a wider audience of young people. The centrality of some of the systems which were developed as a result of the project were described by the Outreach & Liaison Officer.

"Within our Department we have recently created a Schools Outreach programme. The launch of the Oscar Wilde and Reading Gaol schools day was the first time we had used our new schools database. The Oscar Wilde project was really the touchstone from which all our subsequent outreach has been shaped." (Schools Outreach & Liaison Officer, School of Literature and Languages, Reading University)

The symbiotic nature of the process was emphasised by the Recruitment & Outreach Officer.

"We wanted to do more and better on recruitment. The recruitment team had a method they wanted to try and you had a project. It was a marriage made in heaven." (Recruitment & Outreach Officer, School of Literature and Languages, Reading University)

Sensory Trust: 'Clay Trails sensory guide'

Project summary

The Sensory Trust produced a series of accessible and sensory rich interpretation guides to the outdoor heritage landscape of the clay trails in mid Cornwall. These used the plants and features of the clay trails to tell the stories of the local community, as well as the area's industrial and domestic heritage. They used sensory mapping and community events to engage local disabled people, people with learning disabilities, and people with dementia to identify heritage highlights and the stories behind them as well as ensuring the guide was accessible and engaging for all. The process enabled them to explore how heritage sites can create sensory rich experiences for people to explore and engage with the landscape. Downloadable sensory heritage guides focused on different disabilities. A soundwalk app was also developed. These are promoted via local attractions and businesses. The grant award was £10,000.

People interviewed (n=13)

- Development Manager, Sensory Trust
- Inclusive Designer, Sensory Trust
- Museum Manager, Wheal Martyn China Clay Museum and Country Park
- Person with dementia
- 2 carers
- 2 members of staff, Blantyre Day Centre, Cornwall Council
- 3 service users, Blantyre Day Centre, Cornwall Council
- Chair, China Clay History Society
- Writer/poet

Outcomes

There was evidence that the project delivered against all three sets of outcomes - heritage, people, and communities

Outcomes for heritage

The china clay mining industry is generally less well known than some other aspects of the county's industrial heritage. This is in contrast to its actual size. 75 million tons of china clay have been extracted over 250 years.

"People's perception of mining in Cornwall is tin and copper. But the quantity and economic value of china clay far outstrips tin and copper. China clay is the major mining industry in the county." (China Clay History Society)

The Sensory Trust worked with Wheal Martyn, the UK's only China Clay Museum and Country Park (with an annual footfall of 20,000) to make some of the local clay trails more accessible to people with a range of disabilities by using a 'sensory mapping' process. This is a way of identifying places, landmarks, and elements of the natural environment through the full range of senses.

"We wanted to bring the landscape to life, and we needed to ensure there was good parking, a cafe and toilets. Wheal Martyn is the ideal place. This was where we wanted to base the sensory guides and the sound walks." (Sensory Trust)

The Sensory Trust also worked with the China Clay History Society. Founded in 2000 and currently with 250 members, this is the 'resident' expert body on the development of the china clay industry in Cornwall and Devon. They are in the process of creating an extensive archive about the industry, and were able to provide a wealth of archive material for the clay trails guides.

The guides which were produced - in hard copy (including large print and Braille versions), and as an app - made a major contribution to interpreting the trails for people with a range of disabilities, several of whom were involved in the development of the guides.

"We came along to the first one [sensory mapping session], and as we walked along, I talked to [person with dementia] - what she could see or smell, all those sorts of things. We flagged up all the different spots where there was different things to listen to and see and smell. She chatted really well." (Carer)

The guides helped to ensure that this important form of heritage was better recorded.

Outcomes for people

A variety of groups supporting people with different disabilities were involved in undertaking the sensory mapping process. These included people with dementia, people with learning disabilities, and visually impaired people. In small but important ways this helped develop their skills, and made them feel part of a positive learning process.

"We chose a walk which we then followed. The walk took about an hour. We looked for things that might be of interest to others - visual things, old buildings in the distance, historical things, plants with nice aromas. We highlighted them and they were recorded." (Staff member, Blantyre Day Centre)

One person with dementia was asked by a member of staff at the Sensory Trust if he would make a short presentation with her at a conference for health professionals. Despite some nerves, he felt that he had achieved something important in his own development.

"She asked me if I wanted to do a two or three minute speech at this conference. The day come and I was nervous, my anxiety levels had gone right up. We sat at the front – waiting. We heard from another woman who had dementia – a GP. I stood up and I got half way through and I started to slow down. Then things started jumping away from me. But I kept it together and stayed right till the end, and got a round of applause!" (Person with dementia)

The App and the guides were an important way of introducing the heritage of the area to people with disabilities. Invariably, people felt the benefit of this, sometimes in quite life-changing ways.

"In the last 12 months I've gone from stronger to weaker, and memory loss is bad as well. I get a bit frustrated with that. You get some good days and some bad days. With the Sensory Trust it really does help. It gets me out the house and makes me feel a bit happier. When you do the walks you feel happier. When we go out for walks it loosens you up a little bit. Everyone talking to one another – it's a wonderful way to keep in contact. I've made some real good friends. If I didn't have it, because of my

depression, I'd be in a darker place. I know I would. I'd think about topping myself at least twice a week." (Person with dementia)

A poet, who is a world expert on Jack Clemo the Cornish poet, became involved in the project.

"Jack Clemo was relevant to the Sensory Trust because he was deaf and blind."
(Poet)

The poet's role was to help people respond to the china clay landscape in creative ways. He noticed that the schools work he led had the effect of beginning to change perceptions about the local industrial landscape.

"My main involvement with this project was to go to Brannel Senior School and introduce the poetry to the children. The children were 11 or 12.... Some of the poems are hard to approach, but we chose ones that were more landscape based. People don't expect artists or writers to respond to this landscape in a creative way. That's probably quite useful for children to see. I know a few teachers who've given that feedback as well.... To see a landscape they see as a 'broken landscape' turning to something like this, like Clemo's work." (Poet)

Volunteers were involved in a number of ways. Several people took an active role in the initial sensory mapping sessions that informed the creation of the sensory guides. Students from Brannel Senior School recorded poems in the school recording studios for the sound guides, and gave up time in their school holidays to do this.

Outcomes for communities

The Sensory Trust felt that the clay trails were more widely accessible as a result of the project. The combination of arts and heritage was a potent mixture.

"There was something really powerful about having the cultural aspects brought into the project. We had the outdoor aspects and the history of the industry, but there was something really nice about having a strong cultural aspect that ran through the project. The poems had a really sensory element, and they describe the landscape and they communicated it in a different way, that allowed more people to access the stories of the clay." (Sensory Trust)

In particular, there was evidence that people with disabilities were more likely to participate.

"Our audience development plan includes a focus on people with disabilities. The nature of the site is quite difficult. We've had quite a few people in over the summer and we've recommended the route they can do, and how to get the best out of the place. One guy who came with his daughter said 'It's amazing. We've seen so much of it – even with her in a wheelchair'. They managed to get round and she got so much out of it. It's about getting more people with disabilities on site, and the Clay Trails app is great for that because it encourages all sorts of people to come and have a look around." (Museum Manager)

One indicator of the way the project increased accessibility for people with disabilities was the fact that a new 'widgeit' symbol (bespoke symbols to aid communication for people with literacy challenges) for 'china clay' had been invented.

The Sensory Trust felt that it had developed its own capacity and organisational credibility as a result of the project. One of the staff was due to lead a workshop for an HLF conference in London later in the year on heritage and disability. They were seen as being able to provide insights into these areas.

"It's an invite only event and they've invited lots of leaders from the world of disability and the world of heritage, because they really want to focus on how to make heritage more accessible and inclusive." (Sensory Trust)

The Trust also described how the project had enabled them to develop operationally at a local level - in contrast to some of their UK wide strategic work.

"It was an opportunity particularly for us to work in the local area on heritage. Our work previously had been advisory, whereas it was an opportunity to work at the hands-on level locally and actually make use of the connections we had with Wheal Martyn and local community groups." (Sensory Trust)

Partnerships

The project relied to a high degree on effective partnerships. The central one was with Wheal Martin, who spoke about the operational symbiosis that they built up between the two organisations.

"If they're interested in going along the clay trails, we suggest they download the app and use it from here. On the day we did the launch, a few people downloaded it and went out and used it and said how good it was. It encourages people from both sides. People who come here would like to do the trail, and people who've done the trail would like to come and see the museum. It's good from both sides for interesting more people." (Museum Manager)

Other partnerships were with the China Clay History Society, Brannel Senior School, and the local poet.

Sustainability

The sensory guides were clearly now viewed as 'part of the fabric' of both the Wheal Martyn museum and the Sensory Trust, and a number of new initiatives were emerging as a result of the project.

The Sensory Trust have received HLF funding of £47,000 from the 'Your Heritage' programme for a two year project exploring the heritage of four local industries - tin mining in Redruth, china clay mining in Par, fishing in Newlyn, tourism and surfing in Bude. This was seen as building explicitly on the experience and lessons learnt from the Sharing Heritage project.

A fortnightly walking scheme had been developed in Bodmin, based on clay trail walks.

The poet was working on a folk music project with the musician Jim Causley - an album of Jack Clemo poetry set to music. This was a direct result of the Sharing Heritage project

Wheal Martyn were planning to develop a regular dementia cafe - again building on the experience of the Sharing Heritage project.

"After that, you've brought the dementia groups up here. Since doing that we've thought we might have a dementia cafe once a month up here. It's something we're looking into at the moment. It would be different things each month, but have things like bringing the China Clay History Society with some of their archive photographs, and doing a different theme each month." (Museum Manager)

Appendix 3

Research instruments

Topic guide for telephone interviews with completed projects

YOUR PROJECT

1. Please briefly describe your project.
 - your organisation
 - how your project came about
 - the range of people involved in your project eg staff, volunteers, participants
 - the types of activities you carried out
 - the type of heritage that your group chose to feature
 - the successes / challenges

OUTCOMES

2. What were the main intended outcomes of your project?
3. To what extent do you feel you achieved them? What evidence do you have?
4. What **outcomes for people** did you achieve?
 - What did you personally gain?
 - Has the project made a difference to the staff in the organisation [if relevant]?
5. What **outcomes for heritage** did you achieve)?
6. What **outcomes for communities** did you achieve?
 - Has the project made a difference to the capacity of your organisation / group as a whole?
7. Has your project led to any other outcomes (intended or unintended)?

PROCESS

8. Why did you decide to apply to the Sharing Heritage programme in the first place?
9. How did the HLF Outcomes Framework affect the way you designed and delivered your project?
10. How did you find the grant process (contact with HLF staff, pre-application information, application, grant award, final report)?
11. What improvements or changes would you suggest to the Sharing Heritage programme?

SUSTAINABILITY

12. How sustainable is your project (short, medium, long term)? Which factors support this?
13. To what extent did your project increase your ability to undertake further heritage activities?
14. What is the main lessons you learnt from your project? Why is this important to you?
15. Knowing what you know now, is there anything you would do differently?

OTHER

16. Any other comments? Anything you would like to feed back to HLF?
17. Would you be willing to take part in a case study visit during August / early September?

Topic guide for telephone interviews with unsuccessful applicants

THE PROJECT

1. Please briefly describe your project application.
 - your organisation
 - how your project application came about
 - the range of people involved in your project application e.g. staff, volunteers, participants
 - the types of activities you wished to carry out
 - the type of heritage that your group chose to feature

INTENDED OUTCOMES

2. What were the main intended outcomes of your project (for people, heritage and communities)? [See HLF Outcomes Framework below]

PROCESS

3. Why did you decide to apply to the Sharing Heritage programme in the first place?
4. How did the HLF Outcomes Framework affect the way you designed your project?
5. Had you applied to the Sharing Heritage programme before?
6. How did you find the grant process (contact with HLF staff, pre-application information, application, feedback on reasons you were not successful)?
7. What improvements or changes would you suggest to the Sharing Heritage programme?

SUBSEQUENT DEVELOPMENT OF PROJECT

8. What happened following the decision by HLF not to fund the project? (Prompt: Was the project funded through other channels? Was the project delivered without external funding? How did that happen? What outcomes – if any - were actually achieved?)
9. What are the main lessons you learnt from your HLF application? Why is this important to you?
10. Knowing what you know now, is there anything you would do differently?

OTHER

11. Any other comments? Anything you would like to feed back to HLF?

Case study topic guide

1. How and why did you get involved in the project in the first place? What were your expectations?

OUTCOMES

2. What **outcomes for people** have been achieved? (What have people gained personally from the project?)
3. What **outcomes for heritage** have been achieved? (How has local heritage been made more accessible to and understood by local people?)
4. What **outcomes for communities** have been achieved? (How has the local community benefited from the project?)
5. Has the project led to any other outcomes (intended or unintended)?

SUSTAINABILITY

6. How sustainable is the project (short, medium, long term)? Which factors support this?
7. To what extent has the project led on to other activities or initiatives?
 - For your own group / organisation
 - For partner organisations
 - In the community more generally
8. What are the main lessons that have been learnt from the project?

CAPACITY BUILDING

9. In what ways has the project strengthened your group / organisation?
 - Raised profile and status
 - Strengthened partnerships
 - Developed further projects
 - Recruited volunteers
 - Developed skills (heritage, people, management)
 - Developed community support for the group / organisation
10. What lessons have you learnt? Would you now do anything differently?

DIVERSITY

11. To what extent has the project involved people who would not normally participate in heritage activities? Which types of people?
 - As participants
 - As activists
 - As project managers

PARTNERSHIPS

12. In what ways has the project helped develop partnerships with other organisations?
 - Funding
 - Project / service delivery
 - Campaigning / advocacy

OTHER

13. Do you have any suggested improvements to Sharing Heritage, or any other comments you would like to feedback to HLF?