

**The Heritage Alliance research for Heritage Counts
2011**

Strengthening Civil Society: the Role of Heritage

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Introduction

The voluntary heritage sector is an enormous resource for both civil society and the environment in which it resides. This report presents research carried out between February 2011 and May 2011 by The Heritage Alliance, which has provided evidence of and qualified that contribution. The research was commissioned and funded by English Heritage for the 2011 edition of Heritage Counts and undertaken by Alice Brackenbury, Alliance intern with professional support from BOP Consulting. Alliance intern Nicolas Thompson carried out research into Alliance member annual turnover and publications. Heritage Counts is published annually by English Heritage on behalf of the Historic Environment Forum.

The contribution of heritage organisations was examined via the three themes of the government's 'Big Society' initiative ('Social Action', 'Community Empowerment' and 'Opening up Public Services'). The research focused on identifying:

- the extent and type of work the sector is already doing in relation to each of the three 'Big Society' themes
- the challenges and barriers faced in contributing to civil society
- how heritage organisations could contribute further
- what support they require to do so

The sampling frame for the research consisted of all members of The Heritage Alliance (THA) at the time of starting the project (87 heritage organisations), and other smaller or local groups which these members provided information on behalf of, or enabled THA to contact to request their participation. One representative of each organisation had the opportunity to participate. THA organisations have a variety of foci, from archaeology to theatres and traditional crafts, and include both enabling/coordination focused groups and those working in a frontline or delivery capacity. Some organisations operate on both levels.

The research was carried out via an online questionnaire, interviews (by telephone and in person) and case studies (details of the methodology are supplied in Appendix 1).

The Heritage Alliance is grateful for the involvement of the many participants in the research, who have helped to reveal the extensive work carried out by the heritage sector in this area and the means by which that work can be sustained and developed in future.

Executive Summary

1. The current role of heritage organisations in strengthening civil society

Heritage organisations are already delivering in a major way to the government's 'Big Society' initiatives, with the infrastructure for doing so set in place long before the term was ever conceived. The strength of this foundation has facilitated active engagement with the government's Big Society initiatives; participants in the research have a high level of awareness of 'Big Society', and believe that it is relevant to their work, and a significant proportion have discussed the concept, particularly at board meetings.

The questionnaire asked respondents to confirm whether they undertook specific work under each theme of 'Big Society', and it is notable both that every suggested area was confirmed by at least 1 respondent and that responses ranged up to 74% of all respondents. This demonstrates that heritage sector activity contributing to civil society is broad ranging, extensive and intensive:

- 97% of questionnaire respondents are aware of 'Big Society' initiatives and 89% believe it is relevant to their work. 69% of all respondents and 73% of Alliance respondents have discussed 'Big Society', in meetings, at seminars or with other organisations.
- They are contributing significantly in encouraging people to play an active role in society ('Social Action'), particularly by providing the opportunity to become a member of a group or cause (74%), and to donate financially (63%), and providing advice and guidance to more local groups (63%).
- Many are empowering local communities to shape their environment ('Community Empowerment'), especially by providing advice and guidance on planning (46% of all questionnaire respondents), and actively inputting to local planning policy (46%) and to planning applications (47%). Site-based organisations are particularly active in this work.
- Fewer, but still a significant number, are managing heritage assets (10% of questionnaire respondents) and other services (7%) on behalf of local authorities ('Opening up Public Services'), for the benefit of the public, or enabling local community groups to do so, particularly through the provision of advice and guidance. The proportion rises to 27% and 23% respectively amongst respondents from local groups.
- The voluntary heritage sector organisations which responded to the questionnaire are particularly active in an enabling or coordinating capacity, most commonly by providing the opportunity for people to play an active role in society via voluntary work or financial donation and providing advice and guidance for regional groups and projects. This is unsurprising as the respondent organisations, and the focus of THA membership as a whole, is largely enabling/coordinating rather than frontline (49% of the total THA membership consists of solely enabling/coordinating organisations, compared to just 18% focused solely on frontline/delivery).
- Nevertheless, significant proportions of the respondents were active on the frontline, in a variety of areas including inputting to planning, projects to enhance or conserve the historic environment and educational outreach.
- Advisory work, as revealed by questionnaire results and interviews, was prominent over all three research strategies as a means through which organisations contribute

to all three themes, and is being offered in a range of different media, from publications to tailored advice provided on an individual basis.

The extensive data provided by the questionnaire responses allowed an examination of specific groups of organisations, specifically regional and local groups, different sizes of organisation (from very small organisations, with less than 26 employees and volunteers, to large ones, with over 500), and those which own or manage heritage sites. These analyses revealed that:

- Larger organisations are particularly active in all areas of 'Big Society', with 90% of large organisations (over 500 employees and volunteers) contributing to 'Social Action', 80% to 'Community Empowerment' and 60% to 'Opening up Public Services'.
- Site-based organisations are contributing more to 'Community Empowerment' than respondents overall (71% of respondents reported some work).
- Regional and local groups are especially active in all frontline work areas, across all themes, for instance 77% carry out local volunteering projects, 73% are involved in outreach work and 73% input to local planning policy.

Both interviews and case studies revealed in more depth the plural benefits gained from the work of heritage organisations to communities and society at large:

- Participants with voluntary heritage projects and groups are gaining valuable skills and knowledge, both specific to the historic environment and transferable to other contexts. The wide range of skills and knowledge gained by the volunteers involved in case studies ranged from practical skills (archaeological conservation, traditional skills, historic environment surveys) to fundraising, IT skills and knowledge of the planning process.
- Case studies demonstrated that the activities of voluntary heritage organisations are increasing the awareness and education of local community members about heritage and their local historic environment. This is a significant benefit both to the volunteers directly involved, and often to others in addition, delivered through such resources as a museum, an interpretation centre and lectures.
- Groups and individuals are being empowered to better understand their local environment and to have a say in its development. This is brought about through various means including free educational resources and advice tailored to specific locations and contexts.
- Local communities and the public in general are the beneficiaries of many services and facilities due to the work of heritage organisations, including heritage sites open and free for all, green space and community spaces including public houses and cricket grounds.
- Community cohesion is being strengthened through working towards common goals and sometimes through active social inclusion work. A case in point is the involvement of a wide cross-section of the local community in fundraising to bring the site of Colchester Roman Circus into community hands, from football fans to local businesses and school children, while engaging the public at large via new media.

The success of work contributing to civil society can be attributed to attracting and investing in volunteers and retaining their skills base after short-term projects finish, dedication and innovation by delivery organisations, utilising contacts and networks and using a variety of

media to disseminate information, whether for advice and guidance or for fundraising purposes.

2. Barriers and challenges to contributing to civil society

A number of key challenges were revealed which impact upon heritage organisations' ability to contribute to civil society, from questionnaire responses and comments, interviews and case study evidence:

- Organisational capacity was highlighted as a major challenge by all research strategies.
- Questionnaire responses revealed that a wide range of support types were valued, both high level (advocacy, policy change, research, information sharing) and practical (funding, training and advice). Advocacy to both national and local government, and communication and information sharing were particularly popular amongst questionnaire respondents.
- Many organisations would welcome greater engagement from local authorities, and greater recognition from both local and national government as valuable assets for their knowledge and skills. Heritage organisations' relationships with their local authority is frequently a make-or-break factor in their ability to contribute to civil society.
- Questionnaire respondents from regional and local groups, and small organisations valued advice on fundraising and on volunteer management, however this was relatively less popular overall.
- The highest level of response by any questionnaire response group to any support need was for advocacy to local government from large organisations (over 500 employees/volunteers) to contribute to the 'Social Action' and 'Community Empowerment' themes (90% of respondents valued this), for project funding to contribute to 'Community Empowerment' by the same size of organisation (90%), project funding by small (26-100 employees and volunteers) organisations under the 'Social Action' theme (94%), and for communication and information for very small organisations (up to 25 employees/volunteers) to contribute to 'Social Action' (87%).
- The highest level of positive response across all questionnaire respondents to a support need was for project funding communications and information and advocacy to national government to help contribute to 'Social Action', all of which appealed to 76% of respondents.
- The highest level of very positive response (i.e. responses stating that a support need was 'very helpful') over all questionnaire respondents for a support need was for core funding (56%) and advocacy to national government (57%), to contribute to 'Social Action'.
- The significance of core funding was further emphasised by interviewees, its value explained in terms of enabling work to be done in addition to regular tasks, or existing tasks to be carried out more thoroughly and effectively. An alternative, or additional form of support is donation in kind, for example government-funded secondments.
- To contribute to the theme under which least work is currently being done ('Opening up Public Services'), no support need stood out significantly for positive questionnaire responses, but the highest number of questionnaire respondents felt project funding would be 'very helpful'.

- Case study projects demonstrated the benefits of external support from a wide range of sources. These included corporate philanthropy, from equipment and premises, to funding and donations, engagement of local authorities as delivery and funding partners, and input from professionals such as architects, legal professionals and conservators working directly on projects and for training and guidance.
- The knowledge and skills base of heritage organisations was shown to be instrumental to the success of the case study projects, along with innovative ideas from their members and utilising existing contacts and networks. Other means to success included thorough project planning and consultation in the early stages. investment in volunteers: providing training and skills, and the retention of these skilled volunteers throughout and beyond the lifetime of projects.

3. How heritage organisations could contribute further, and the support required to do so

The research findings were notable for the broad range of support types cited as valuable in contributing to civil society. A range of practical (advice, funding and training) and high level (advocacy, research and evidence, policy and communications) support needs were suggested in the questionnaire, and all receive positive responses on balance.

The questionnaire results indicated that a majority of respondent organisations are contributing to the 'Social Action' and 'Community Empowerment' themes. While all suggested work areas were reported by some respondents under the 'Opening up Public Services' theme, the latter is the theme least engaged with by respondents. However, the majority of the case studies involved an element of work under this theme, and the follow-up interviews provided some insights as to how heritage organisations are contributing to this theme.

- In terms of support needs to contribute to this theme further, all suggested needs attracted a positive response on balance from questionnaire respondents, and the difference between the highest and lowest levels of response was just 7%, therefore it is difficult to say that one or more support needs were most prominent under this theme.
- By a slight margin, research and evidence, advocacy (to both national and local government) and funding (core and project) are most popular.
- Specific comments on support needs for 'Opening up Public Services' focused largely on funding, as for all themes, however governmental support gained particular prominence in comments. Specifically, this involved ensuring that assets to be transferred are endowed, more willingness of local authorities to transfer assets, and a recognition of heritage organisations' value as a source of knowledge, skills and expertise.
- One organisation reported an increase in the number of enquiries from local authorities with regards to managing services and assets, indicating that work in this area may increase.
- Local and regional groups were significantly more active in this area, and two of the case studies with an 'Opening up Public Services' aspect involved small local groups; due to the nature of this work it is expected that frontline contributions to this theme are more likely to be carried out by groups of this nature than by organisations with wider remits, which constitute the majority of THA's membership.

Core funding (along with funded secondment roles) was a recurrent theme across the questionnaire and interview responses, and was viewed as a way to enable organisations to work faster and more effectively, and in some cases above and beyond their regular responsibilities. There is a strong impression from questionnaire, interview and case study comments that while volunteers are immensely valued, paid employees are needed; one questionnaire respondent emphasised that 'even one' can make a difference.

The engagement of local authorities with heritage organisations was further evidenced as a key factor in relation to the heritage sector's contribution to civil society by case studies:

- Positive relationships with local authorities were beneficial to at least 2 of the case studies (CSI Sittingbourne and HAR Lincolnshire) as funding and delivery partners.
- In contrast, two organisations which participated in the research had been impeded in their work towards 'Opening up Public Services' and 'Social Action' by lack of pro-activity and engagement from local authorities. One respondent expressed concern that local authorities are impeding Buildings At Risk projects due to underuse of enforcement powers.
- The need to recognise heritage organisations as valued assets in terms of their skills and knowledge was identified by questionnaire respondents and interviewees as key to facilitating and enhancing the heritage sector's contribution to civil society.

The overall impression is that heritage organisations' relationships with local authorities are highly variable, but that this is an area which can have a highly significant impact on ability to contribute to 'Big Society' initiatives.

The largest organisations favour advocacy to local government and project funding, while the smallest reported less overall need for support but responded positively to communication and information sharing and advocacy to both national and local government (advocacy to national government more so with respect to delivering to the 'Social Action' theme).

Regional and local groups valued all support needs fairly equally, but feel most strongly about advocacy to local government as a helpful means of support.

A valuable source of existing support as revealed by case studies and interviews was corporate philanthropy, which corresponds to the significant proportion of questionnaire respondents that confirmed that they offered the opportunity to donate financially to a cause. Donation in kind, whether in terms of premises, equipment or professional support, is also of immense value to the heritage sector's role in strengthening civil society.

4. The Future

A significant revelation was the overwhelming optimism of heritage organisations as to their future contribution to civil society:

- 88% of THA member respondents expect to maintain or increase their amount of activity contributing to civil society in the near future, and 81% expect to maintain or increase the range of projects they deliver. This rises to 91% of regional and local group respondents. Around half of all respondents are confident that their contribution will increase.
- This sense of progress was carried through to case studies, many of which had plans in place to further their work geographically or in terms of scope.

- Reasons for organisations' positive expectations of the future were often highly specific, but a theme running throughout the responses was an increase in awareness of the value of both heritage and heritage organisations, on behalf of the public and local government.

When this optimism for the future is combined with the evidence generated of the extensive and intensive current work in this area, and the high level of awareness of the 'Big Society' initiative, the overriding impression is that the contribution of the sector will only increase.

Results

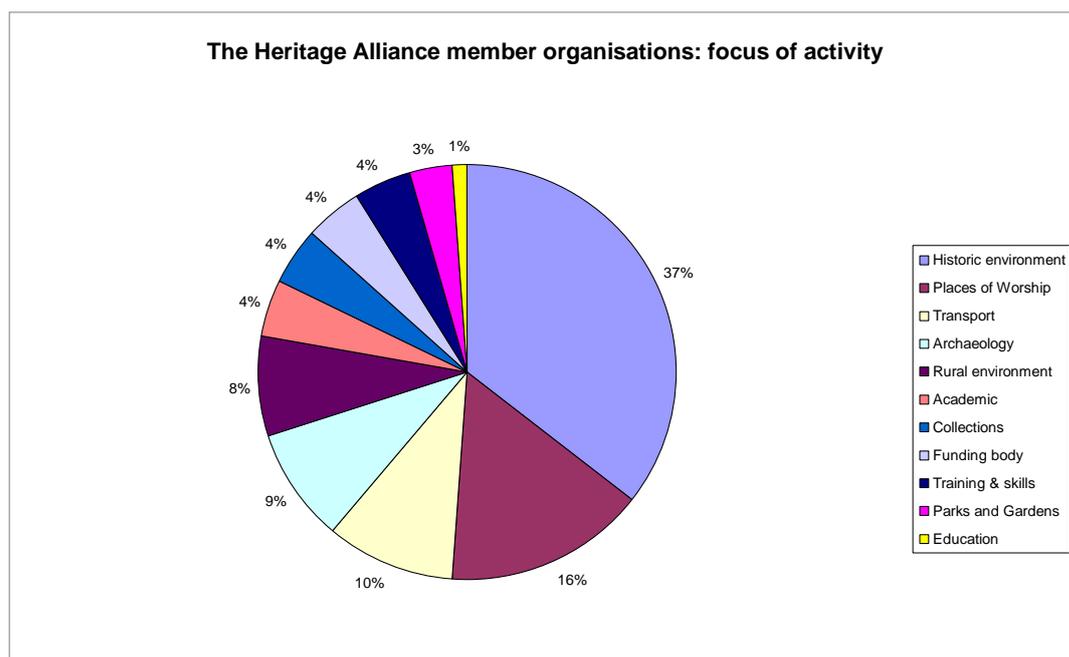
Questionnaire

Overview

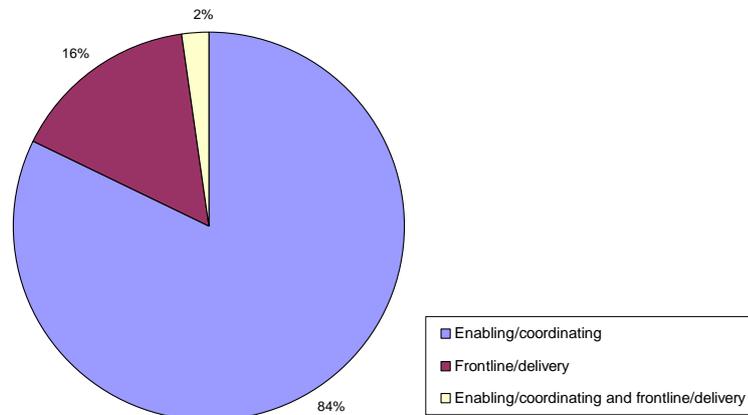
The questionnaire, 'Strengthening Civil Society: the role of heritage' was circulated to THA members between 3rd March and 30th March 2011. Representatives of 70 organisations responded, consisting of 62 THA members and 8 other organisations, including more local groups. This represents a response rate of approximately 71% of THA member organisations at whom the questionnaire was targeted. 2 of the non-member organisations (members of THA members) responded to a version of the questionnaire edited for such groups.

The variance in respondents from the overall distribution of THA members by theme (e.g. places of worship, funding body) and type (enabling, frontline or both) was 7% at maximum (over-representation of the historic environment as a theme), with archaeological and academic organisations under-represented by 3% each. Organisations with both enabling and frontline functions as opposed to either single functionality were over-represented by 5%, while solely 'enabling' organisations were under-represented by 4%. Therefore, the questionnaire sample achieved a good representation of THA membership as a whole in terms of the focus and type of activities. The overall composition of THA membership with regards to theme and type is shown in the charts below.

Where not all respondents have answered a question, this is noted. Where no comment is made, all respondents supplied an answer. Questions 1 and 2 asked respondents to supply their name and that of their organisation.



The Heritage Alliance member organisations: type of activity



3. How many employees and volunteers does your organisation have at present? This will help to demonstrate the size of the voluntary heritage sector.

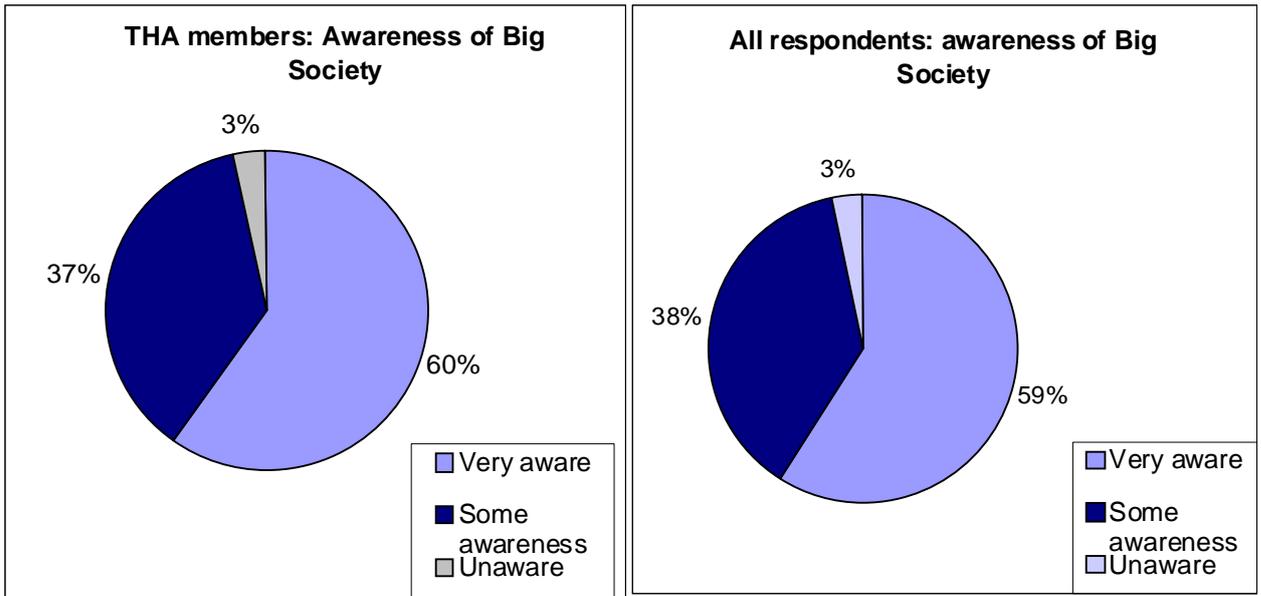
The number of volunteers reported by respondents was over 150,000 (THA respondents over 149,000) volunteers in total including trustees and volunteers of member organisations of the respondent groups, far outnumbering paid employees at over 6,500. Over 9,500 volunteers are directly involved with THA member respondents. The majority of paid employees were permanent staff; only 123.5 temporary employees were reported. It should be noted that these figures are both an estimate (many respondents gave an estimated response) and a minimum, likely to be significantly lower than the actual numbers; many figures were in a 'more than...' format, and some significant numbers were described but an exact figure not supplied. Examples of such responses (which indicate the degree by which the figures were underestimated) were 'several thousand', '83+partners' and 'Staff of 41 diocesan offices and National Church Institutions'.

It is also worth noting that a large majority (over two thirds) of the total number of volunteers reported are involved with just 4 of the organisations which responded (all of which are THA members, and 3 of which are site based), the National Trust (61,000 volunteers), the Association of English Cathedrals (13,000), the Heritage Railway Association (over 16,500), and the Ramblers Association (12,000). The only respondent organisation which involves no volunteers is the Institute for Archaeologists.

'Big Society': awareness and engagement

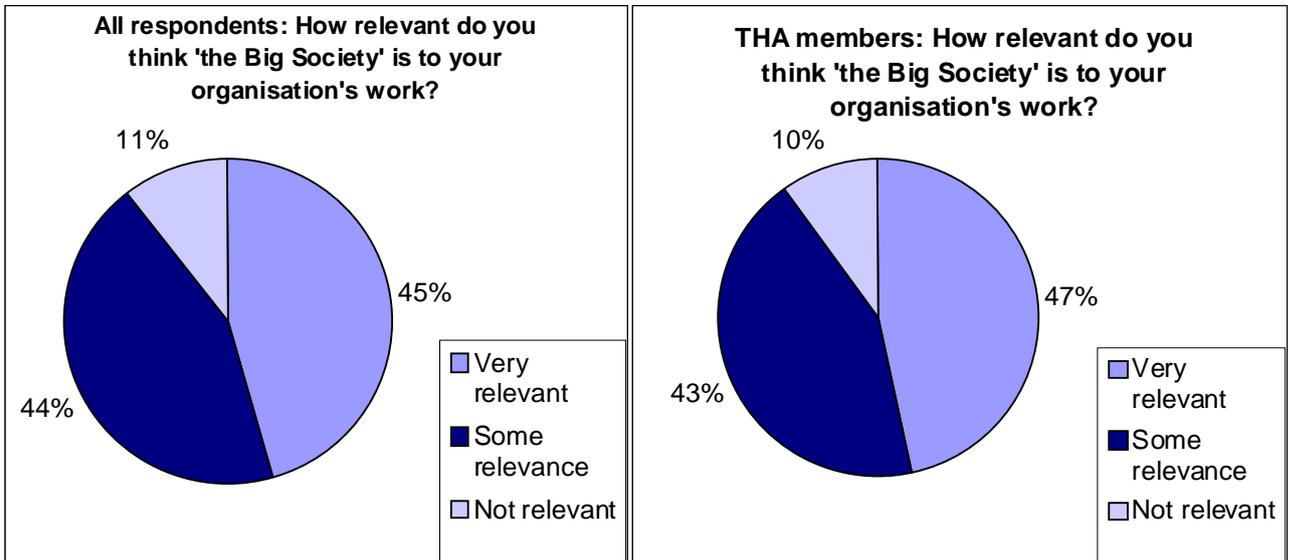
4. How aware are you of the government's aims for strengthening civil society, known as 'the Big Society'?

68 respondents answered this question. Awareness of Big Society was widespread amongst all respondents, with just 2 stating that they were unaware of the concept. The modal response was 'very aware'.



5. How relevant do you think 'the Big Society' is to your organisation's work?

65 respondents (including 60 THA members) completed this question. Big Society was overwhelmingly felt to be relevant, with 89% of all respondents (including 90% of THA member respondents) responding positively.

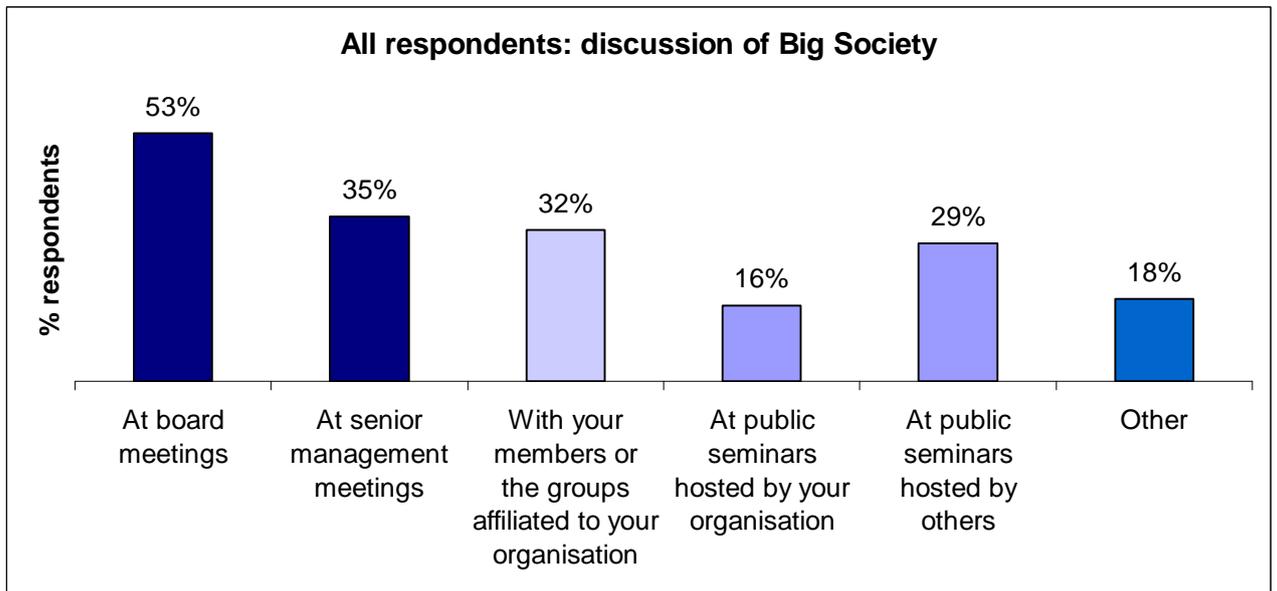


6. Has your organisation discussed 'the Big Society'?

48 organisations (69% of respondents) confirmed that they had discussed 'Big Society' in some way, including 45 THA members (73%). The concept has been most commonly discussed in meetings, especially at board level.

Other discussion types reported in addition to those suggested included online discussion (including social media: Civic Voice), with other local groups (Friends of Magravine Cemetery), the Church of England's General Synod (Church of England Cathedrals and

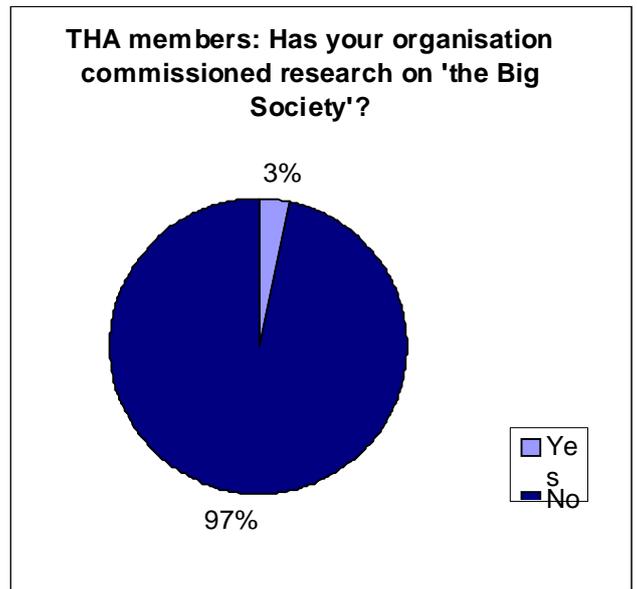
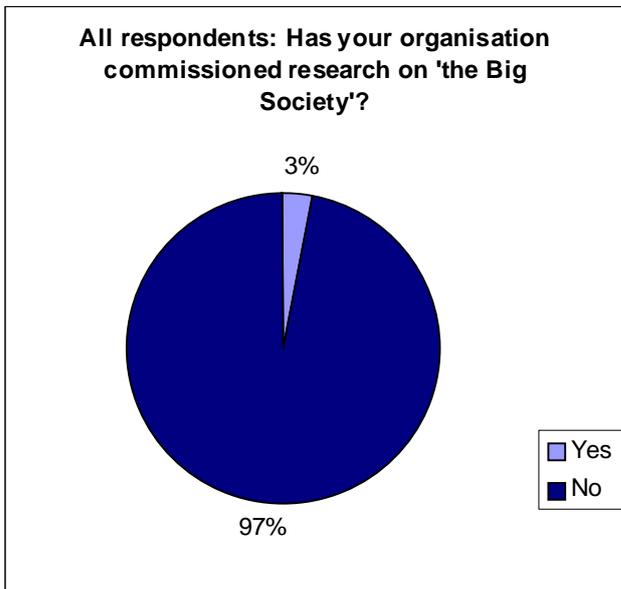
Church Buildings division [CCB]) and via other groups (specifically the Town Planning Working Group, mandated to make such decisions on behalf of The Highgate Society). THA member respondents were slightly more likely to have discussed 'Big Society', specifically at meetings and public seminars.



7. Has your organisation commissioned research on 'the Big Society'?

Very few organisations of the 67 (including 62 THA members) that responded to this question had commissioned research; only 2 (both of which were THA members) reported that they had done so.

The research commissioned was Civic Voice's own questionnaire undertaken in parallel with this one, a 'major report on community archaeology, funded by the Headley Trust', and 'work on community engagement with conservation, funded by the Esmee Fairbairn Foundation' (both of the latter responses were by the Council for British Archaeology).

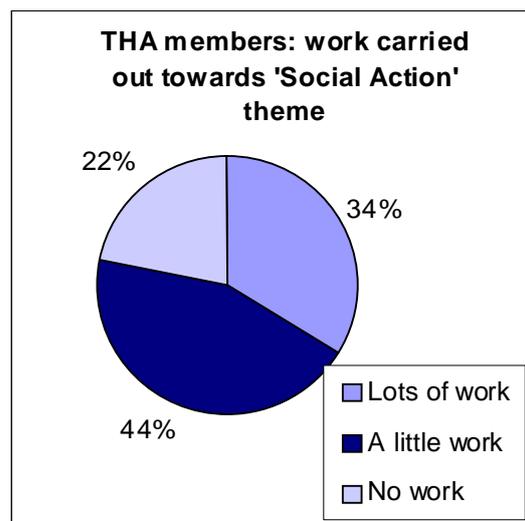
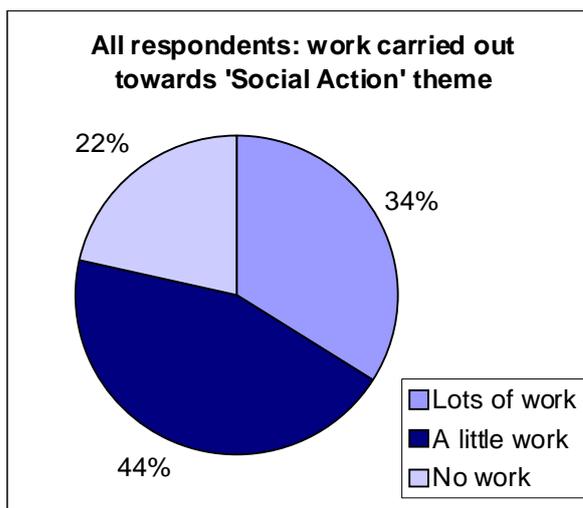


'Social Action' theme

This theme of 'the Big Society' focuses on encouraging people to play a more active part in society, for instance as volunteers or as financial donors.

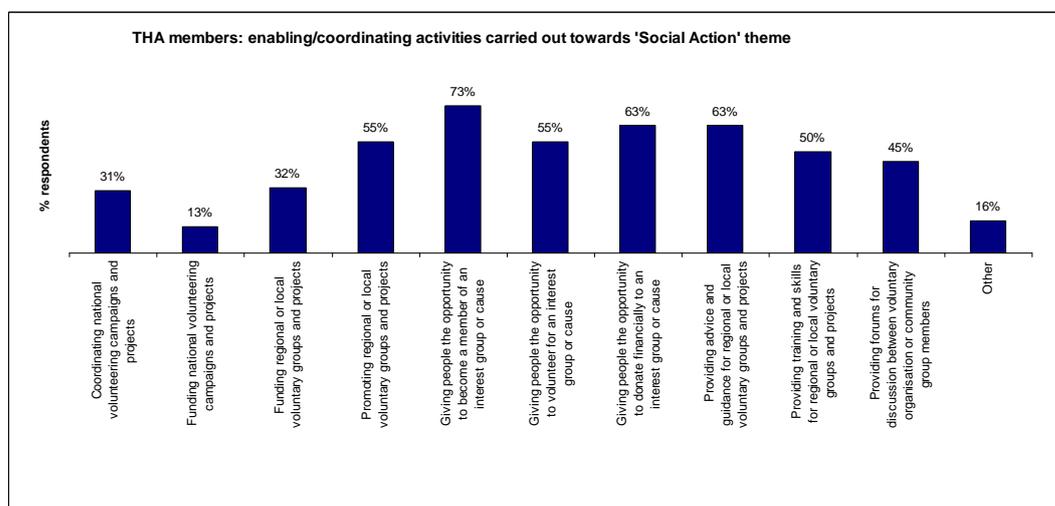
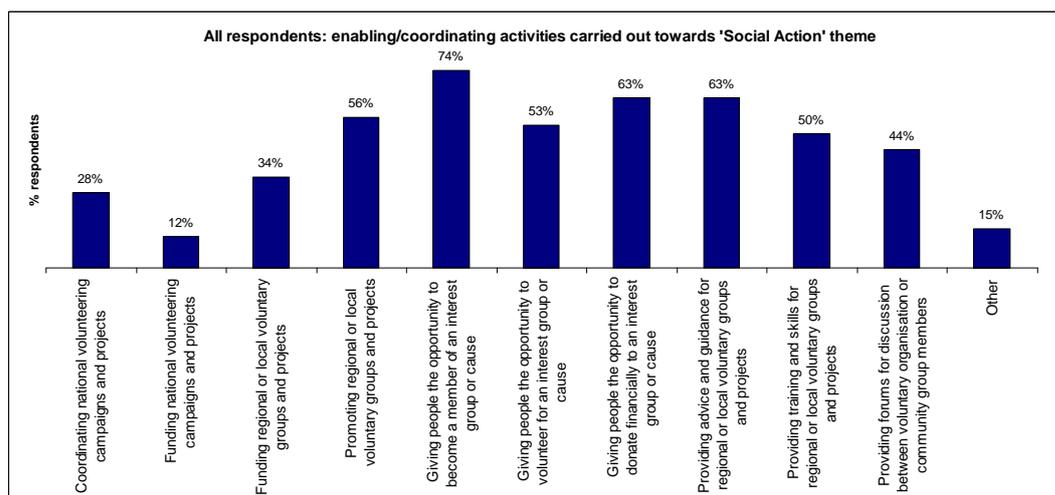
8. Is your organisation already doing work in England which is relevant to the 'Social Action' theme or which might contribute towards it?

Of the 65 organisations that answered this question (60 THA members), a large proportion (78%) felt that they carried out work in this area. The majority described this as 'a little work' rather than 'lots of work'.



9. ('Social Action' theme) does your organisation undertake any of the following enabling or coordinating activities?

58 respondents confirmed that they were involved in specific activities under this theme (including 51 THA members). In particular, providing the opportunity to become a member of an organisation, giving the opportunity to donate financially to a cause (74% of respondents), and providing advice and guidance for voluntary groups and projects were common activities. The work area with which fewest organisations are engaging with are funding projects (particularly national ones) and coordinating them; THA members were slightly more likely to fund and coordinate national projects.



Examples of the work undertaken included a volunteer-run 'national HLF funded project to train 16 heritage blacksmiths over the next 2 years' (National Heritage Ironwork Group) and the coordination of 120 regional volunteers by the War Memorials Trust (WMT). Many examples of funding of both local and wider scale projects were provided, including the UK Association of Preservation Trust's (APT's) area committees, community archaeology projects (Derbyshire Archaeological Trust) and the distribution of repair grants through local (volunteer-run) Churches Trusts (National Churches Trust, NCT). Smaller volunteer groups promoted included the County Churches Trusts (NCT), the Campaign to Preserve Rural England (CPRE)'s volunteer-run branches and the Institute of Conservation (ICON)'s regional groups. The Association for Industrial Archaeology (AIA) and the Royal Town Planning Institute's Historic Environment Group (RTPI HEG) specified that they promote these groups via newsletters and member bulletins, respectively.

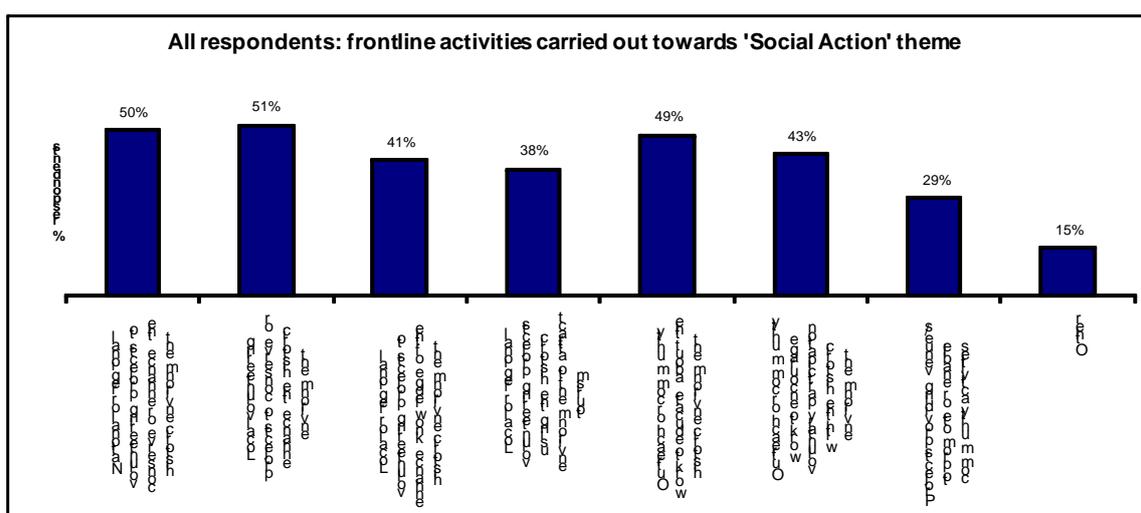
A wide variety of advice and guidance is being offered to regional and local groups by respondent organisations, including ‘assisting local pier groups to ‘save their pier’ (National Piers Society), provision of ‘support and advice to community groups working to preserve heritage’ (Princes Regeneration Trust, PRT), ‘through Churchcare and Shrinking the Footprint and church art websites and specific casework advice’ (Church of England Cathedral and Church Buildings Division [CBD]), giving ‘advice on best practice to members and volunteers’ (Historic Libraries Foundation) and ‘via member practice events’ (RTPI HEG).

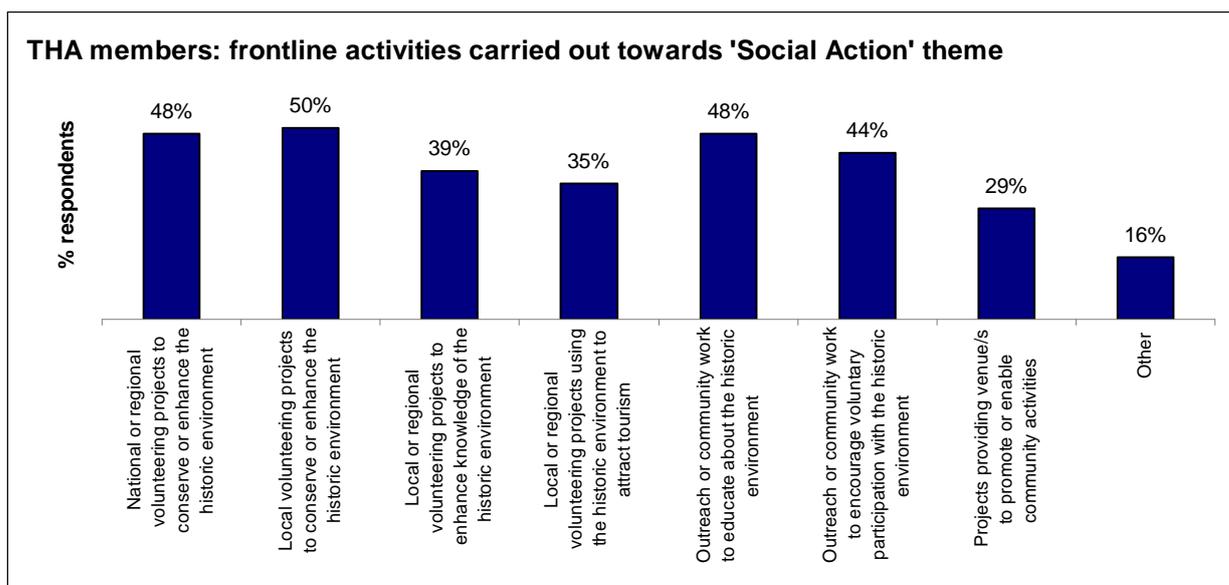
Training and skills are being offered in numerous areas, for instance ‘recording and identification skills training’ (Association for Industrial Archaeology), ‘diversity projects; involvement in HLF Skills for the Future (HRP); access, youth, community partnerships’ (Historic Royal Palaces), ‘training churchwardens and their equivalents’ (Society for the Protection of Ancient Buildings, SPAB), ‘training days in cataloguing, provenance and other specialist areas, and conferences at little above cost’ (Historic Libraries Forum) and training for regional volunteers and war memorial custodians (WMT). ‘Forums for discussion’ are being provided via national conferences and seminars (APT, Church of England CCB, PRT, Association of Independent Museums), regional committee meetings (APT), ‘forums for discussion between volunteer members (ICON), and ‘access forums; youth forums; family forum’ (HRP).

Other areas of work highlighted in addition to those suggested included communication, for instance the Heritage Railway Association’s ‘liaison with other railway heritage organisations worldwide’, and ‘advising and helping libraries at risk’ (Historic Libraries Forum). Published advice and information was also described, for example the Mausolea and Monuments Trust’s gazetteer of mausolea and RESCUE’s ‘technical manuals and advice documents’. The Historic Towns Forum also cited their planned event programme on the subject of localism and Local Enterprise Partnerships (LEPs).

10. Is your organisation involved in any frontline activities in this area? (please confirm all that apply, and supply additional details of these activities if you wish, including if the activities are aimed at specific groups, e.g. young people)

57 respondents, including 50 THA members, answered this question. All work areas were represented, particularly ‘local voluntary projects to conserve or enhance the historic environment’ and ‘outreach and community work to educate about the historic environment’.





Specific examples given of national and regional projects to 'conserve or enhance the historic environment' include the Magic Attic Archives' voluntary running of a local archive, 'historic ship restoration and operation' (Heritage Afloat), and the Ramblers Association's work on the coast and forestry walking environment. Examples of local projects of this type are the Hammersmith and Fulham survey of monuments and sculpture (Friends of Magravine Cemetery), the work of the local voluntary guardians taking care of 6 mausolea in the ownership of the Mausolea and Monuments Trust condition checking and helping with opening the buildings on Heritage Open Days, and the restoration, running and interpretation of road vehicles by the National Association of Road Transport Museums.

Activities to enhance knowledge of the historic environment include lecturing on historic libraries (Historic Libraries Forum) and CSI Sittingbourne (a project training volunteers to conserve archaeological objects, ICON; more information in Case Studies section). Examples of projects focused on attracting tourism encompassed a 'major local initiative to bring tourism... in conjunction with the City of London as owners of Hampstead Heath, a neighbouring Amenity Society, and the Borough of Camden' (The Highgate Society), the Festival of British Archaeology to promote sites and events (Council of British Archaeology) and the provision of 'opportunities to travel in historic vessels' by Heritage Afloat's member organisations.

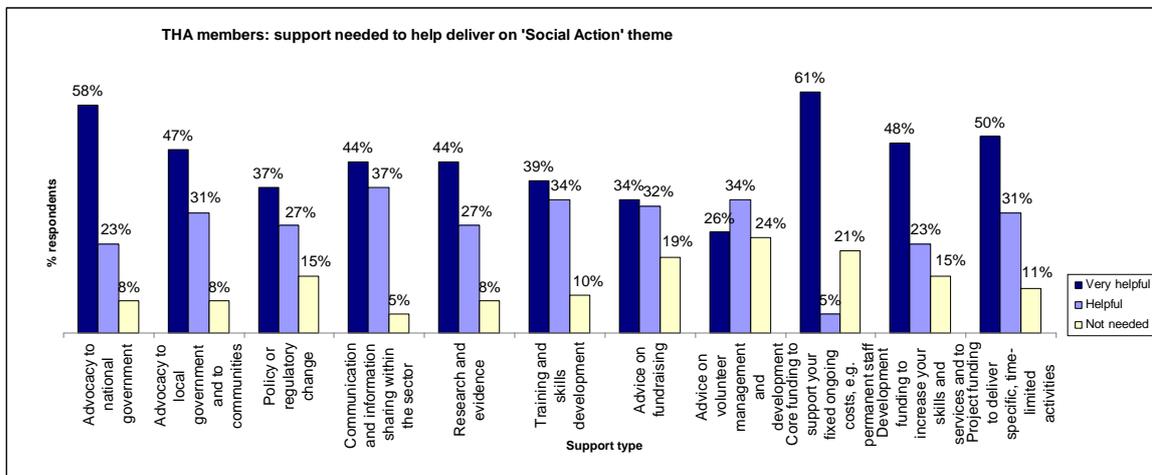
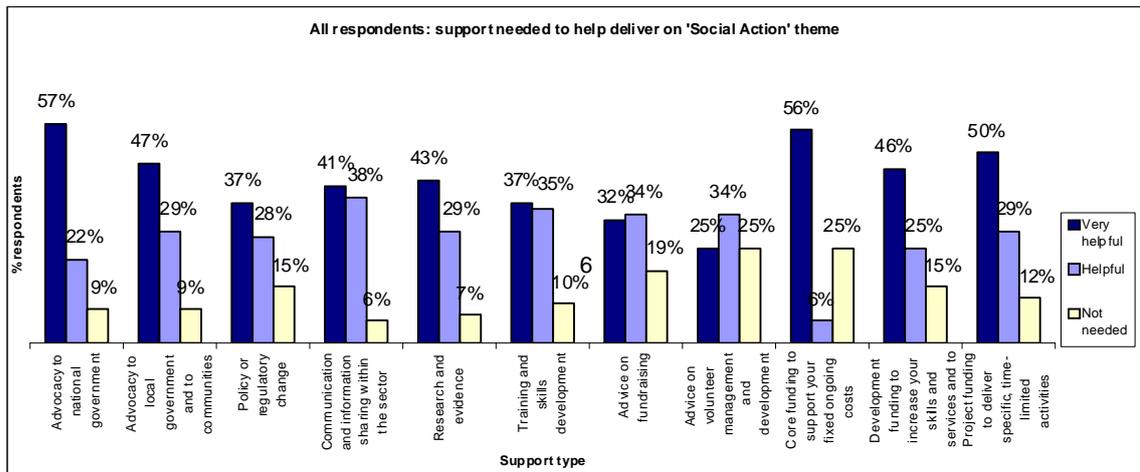
Contributions to the theme via outreach and community work were described both in terms of education and encouraging participation, for example the Council of British Archaeology's Young Archaeologists' Club, a 'role play game for schools' by the Association for Small Towns and Villages in the UK (ASHTAV), a 'broad outreach and community involvement programme' at all Historic Royal Palace's sites, and the fact that '8,000 schoolchildren took part in organised heritage learning programmes' at the Greenwich Foundation's Old Royal Naval College site. Friends of Magravine Cemetery 'hold events to plant trees and hedges in cemetery monuments'.

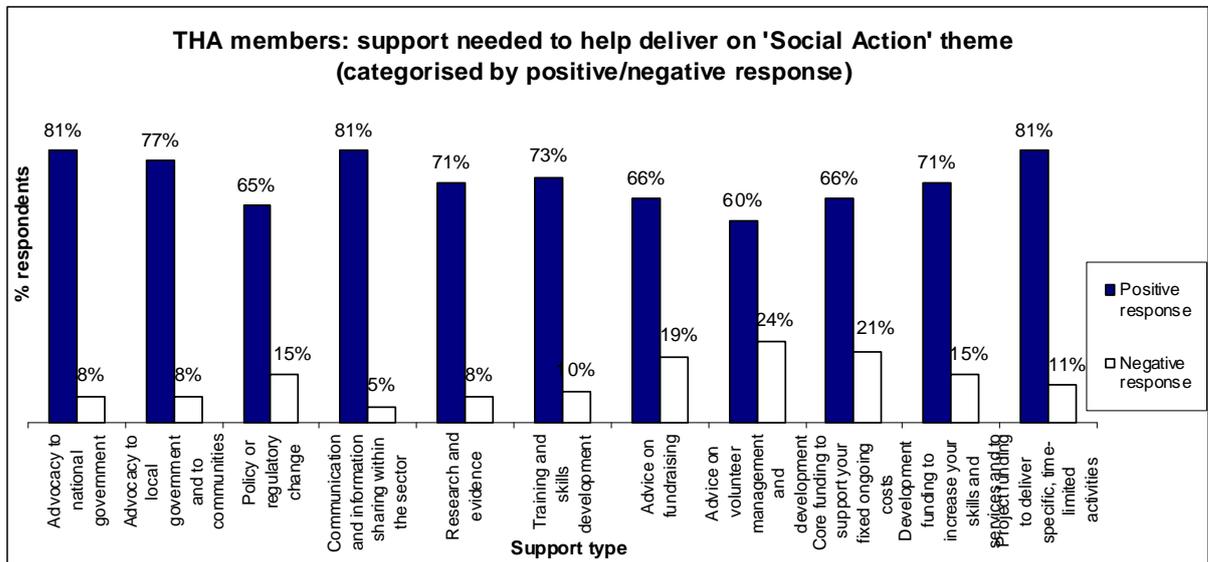
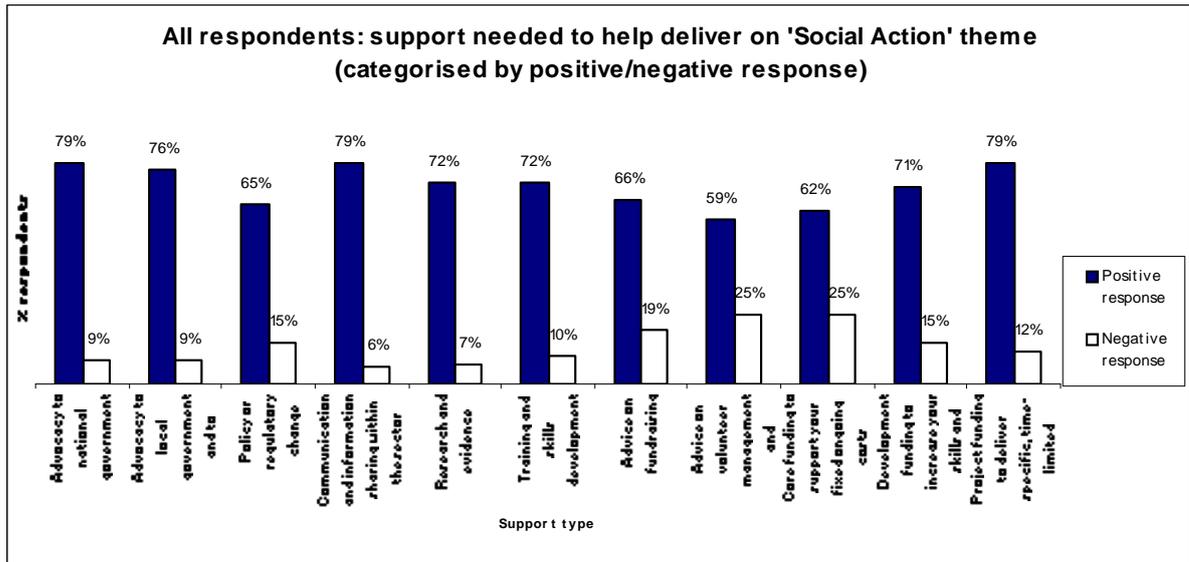
Specific examples of venues provided to promote or enable community activities include 'historic venues offered for community use (e.g. Hermitage Community Mooring at Wapping in London)' (Heritage Afloat) and 'Provision of community space as part of Kensington Palace redevelopment project' (HRP).

'Other' areas of work mentioned were training (e.g. for conservation professionals by the Royal Institute of Chartered Surveyors [RICS] Building Conservation Forum) and raising awareness ('campaigning for archaeology, highlighting issues of concern, publication, publication of issues on website and in newspapers' by RESCUE).

11. What kind of support could help your organisation to better deliver this work?

64 respondents answered this question, of which 57 were THA members. Overall, all the support areas were felt to be helpful or very helpful by a majority of respondents. The largest number of highly positive responses ('very helpful') were for advocacy to national government, and core funding (all of the responses for the latter coming from THA members), followed by project funding; however core funding also received the highest number of responses stating that it is 'not needed' among all respondents (and the second highest amongst THA members), along with advice on volunteer management and recruitment (highest amongst THA members). It is evident that the majority of those respondents that felt that core funding was needed, felt very strongly about this. The highest number of positive responses ('very helpful' and 'helpful' combined) were allocated to advocacy to national government, communication and information, and project funding.





12. Do you have any specific comments on your organisation's support needs?

26 respondents offered additional comments on their support needs, including 23 THA members.

The majority of responses (15) focused on funding (all of these were THA members), with 9 of these specifying core funding as a key area in which support is required. The rationale behind this need was explained by ICON: 'the biggest issue for our organisation is sustainability. Much of our income is project based. We would like to see a larger percentage of our income sustaining core costs' and the War Memorials Trust: 'The biggest challenge is finding the core funding. We know what to do and how to do it but the challenge is to get people to support the ongoing work'.

Civic Voice and Norwich HEART commented as follows:

'Recognising the value of support/infrastructure organisations requiring small amounts of core (not project) funding is critical - they have massive multiplier benefits across the movement with volunteers and local community groups'. (Civic Voice)

'We are very successful in developing project related activities having grown from 1 person & modest turnover in 2004 to 16 perm staff & £2M turnover in 2010. The massive challenge is to secure sufficient core funding to allow us to develop an effective range of project activity. If core funding declines (as it is with public sector cuts) 'doing' resources have to be devoted to fund raising'. (HEART)

The National Heritage Ironwork Group (NHIG) expressed concern that lack of core funding forces volunteering resources to be channelled into less beneficial work: 'we have found nobody who will core fund leaving us totally reliant on volunteers doing work which doesn't benefit them directly but does benefit the sector as a whole. Unfortunately the commitment is already above and beyond what could be called 'acceptable' on a voluntary basis'. They also feel that the HLF's definition of public participation should be extended:

'All our projects 'benefit' the public in the long term by sustaining our ironwork heritage. They all also involve many people as the projects are relevant to and engage with all professionals working in the sector. However, they are of course reliant on the need for professionals to do the work and do not always naturally or readily fit getting i.e. 'school groups' involved. As such we would argue that the interpretation of 'public participation' needs to be broadened within funding applications.'

The Church of England Cathedrals and Church Buildings Division emphasised that 'the Church of England is perceived to have generous state support, however, it has no direct funding from government. The annual cost of repairs to Church of England churches is estimated at £115m of which 68% has to be found by local congregations'.

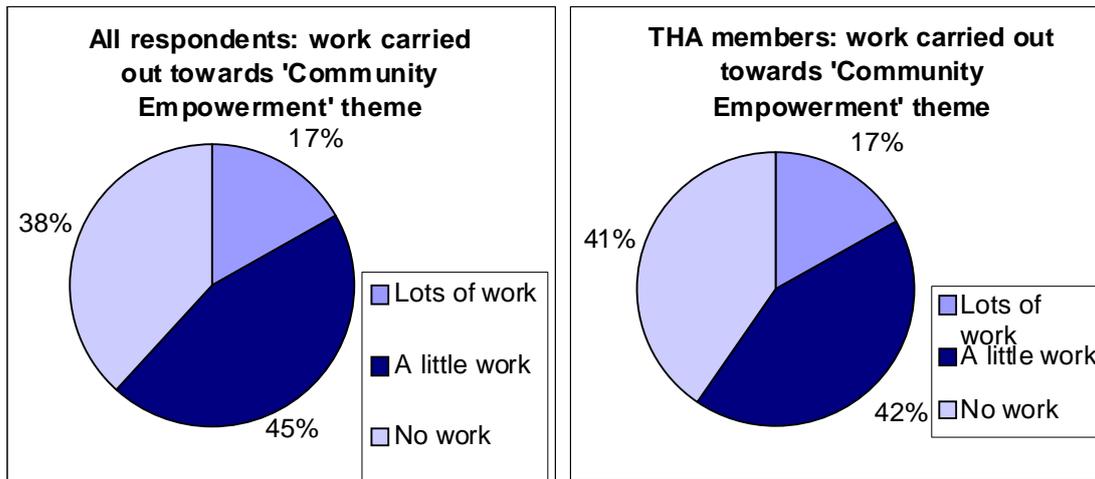
Capacity was also highlighted as a key issue; the APT expressed its need to 'establish a stronger central core of development officers', and Heritage Afloat stated that they were unable 'to respond quickly and effectively to requests for technical advice, searches for historic vessels to attend a particular function, press enquiries etc. It seeks to create a regular contact point for enquirers within the next 1-2 years. (Heritage Afloat)', and the Historic Libraries Forum feel they 'could do more if we had a part-time employee. At the moment we are all volunteers'. These comments also touch upon core funding. The Battlefields Trust feels that some aspects of current government policy are a barrier; 'at present some national and local government policies actually run counter to our aims and objectives (e.g. the abolition of the Regional tier of government decouples us from European partners) so a less uncritical implementation of public policy is needed', while the Highgate Society emphasises that 'a formal remit for community groups within the planning system is essential'.

'Community Empowerment' theme

Work in this area gives local authorities and local residents more power to influence their local area, for instance encouraging local residents to input to planning and development decisions.

13. Is your organisation already doing work in England which is relevant to the 'Community Empowerment' theme or might contribute towards it?

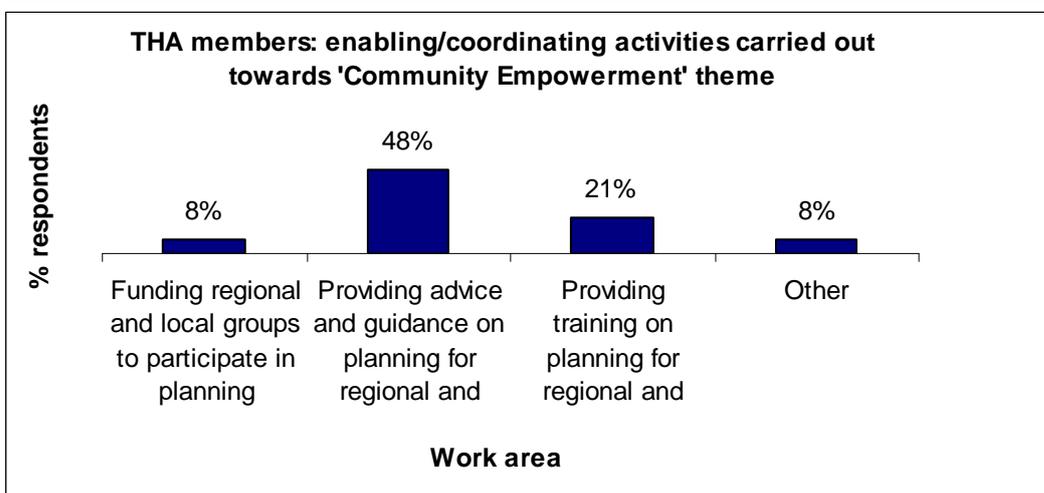
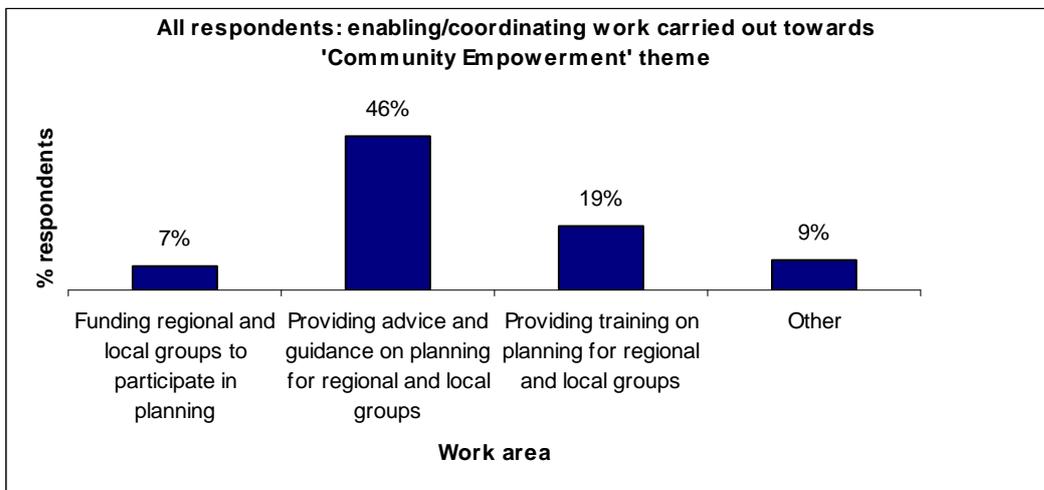
64 respondents completed this question (58 THA members). The response was less positive than for the 'Social Action' theme, although well over half of respondents stated that they were doing some work ('a little' or 'lots'); THA members reported slightly less activity (59% answered positively, compared to 62% of all respondents). The most common response was 'a little work'.



14. If so, does your organisation undertake any enabling or coordinating activities in this area? (please confirm all that apply, and supply additional details of these activities if you wish)

32 organisations completed this question, 30 of which were THA members.

By far the most common enabling/coordinating work area reported was providing advice and guidance on planning for regional and local groups, followed by providing training for the same purpose. THA members were slightly more likely to provide advice and guidance or training on planning or to fund regional or local groups.



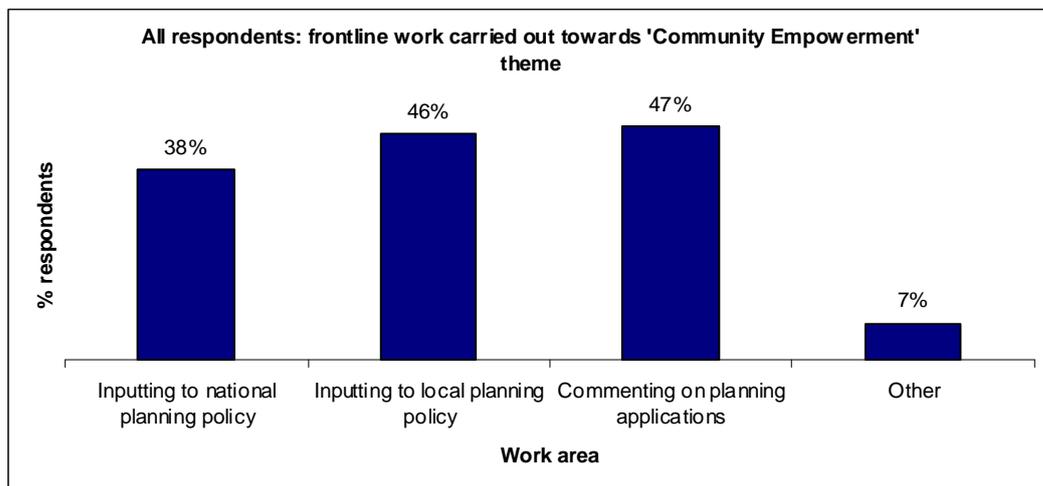
Specific examples of advice and guidance offered ranged from a ‘help desk for members’ (ASHTAV), to regular advice for ‘local groups on planning issues affecting shore-based maritime facilities’ (Heritage Afloat), ‘advice to our Branches who lead on planning issues in their area’ (Campaign to Protect Rural England), ‘guidance and lobbying on industrial archaeology planning applications’ (Association for Industrial Archaeology), offering advice when working with groups on projects (Princes Regeneration Trust), RTPi Planning Aid, and as part of a seminar programme (Historic Towns Forum). Funding was defined as being offered by the APT ‘for area committees which host programmes involving planning issues and opportunities, and by the CBA ‘to a limited extent via regional groups’.

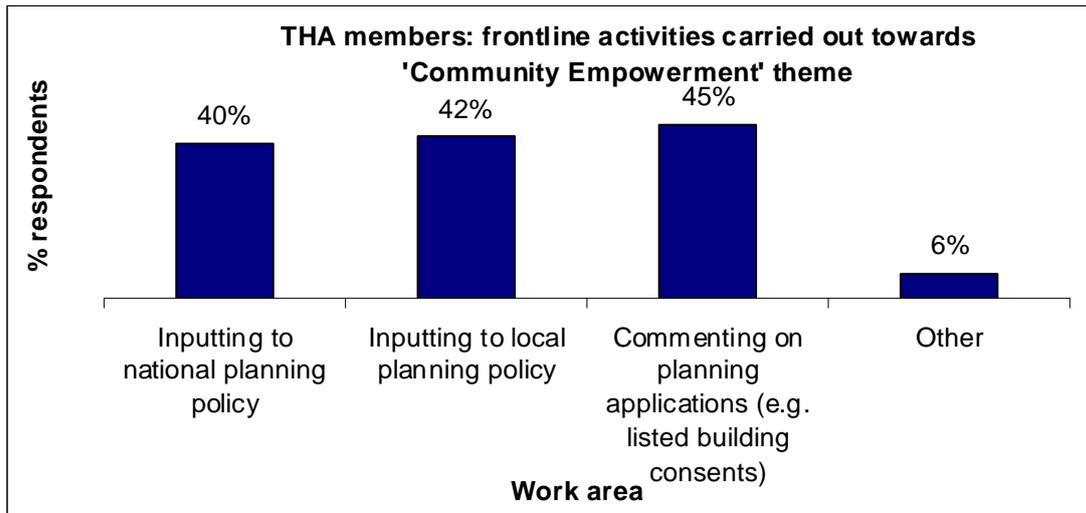
Other examples of ways in which organisations are contributing to the ‘Community Empowerment’ theme in an enabling capacity include RESCUE’s work to raise awareness: ‘Publication of all of our responses to government and other state initiatives on our website is intended to assist members and others in acting in support of archaeology and archaeologists by providing information and access to relevant data’ (RESCUE - The British Archaeological Trust), local involvement in planning consultation on palace projects (HRP) and advocacy, e.g. ‘Influencing national legislation and policy, raising the media profile, influencing the role being played by local government, developers and professionals’ (Civic Voice); ‘national support for Branch networks which are active locally, active lobbying and advocacy on the legislation’ (Institute of Historic Building Conservation, IHBC)

In addition, it has been demonstrated that Alliance member organisations have a key role in knowledge exchange in the heritage sector, by Alliance research into member publications. This is detailed later in the document.

15. Community empowerment: Is your organisation active at the local level in this area?

42 respondents, including 36 from THA member organisations, completed this question. Frontline work is more prevalent than enabling and coordinating work under this theme, except for the provision of advice and guidance. The work areas each attracted relatively similar levels of response, although only one non-THA member (the Highgate Society) reported that they had inputted to national planning policy (as might be expected since these were predominantly small, local groups).





The Architectural Heritage Fund (AHF), the Princes Regeneration Fund and the Historic Towns Forum (HTF) confirmed that they inputted to national planning policy via consultation. The Greenwich Foundation comments via the Historic Environment Forum. As regards local planning policy, the Mausolea and Monuments Trust described how they are 'involved for one specific project (Dorking, Surrey) at the moment (which) may provide a model for future activity', while both the Council for British Archaeology and the Campaign for Rural England's regional groups and branches are involved in this area.

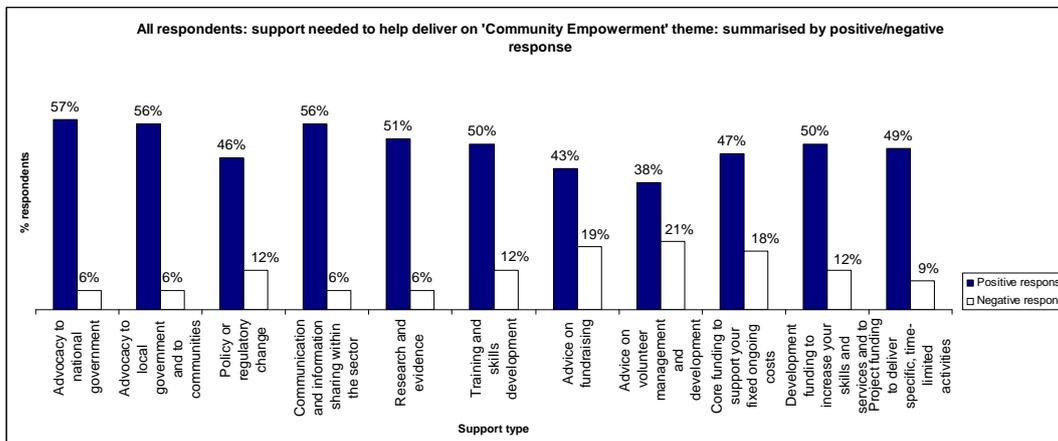
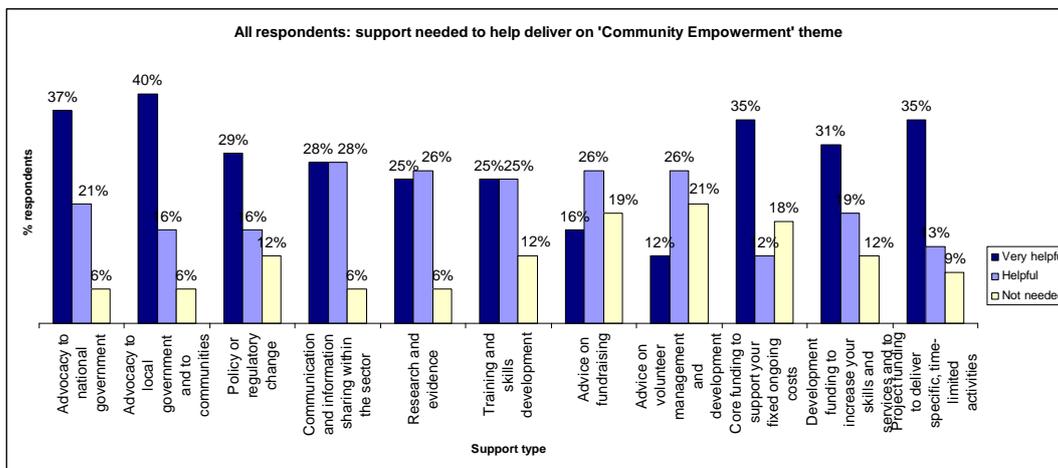
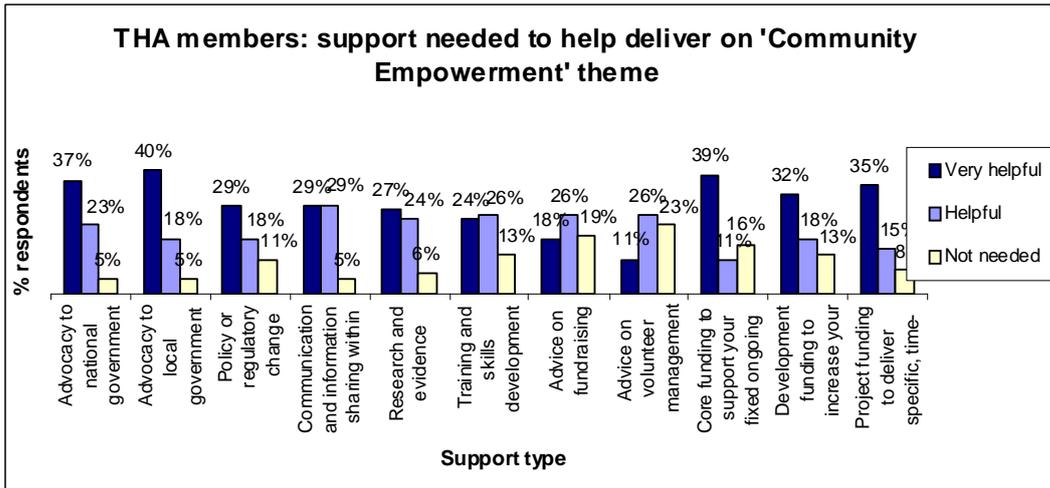
Commentary on planning applications were described as occasional by some organisations, e.g. RESCUE - The British Archaeological Trust: 'only in specific cases of threat or exceptional need, 'many situations over the years, but not on a statutory basis' (National Piers Society), while the Highgate Society stated that they respond to all planning applications in their area. The Heritage Railway Association 'support relevant applications by members'. The representative of Norwich HEART reported that they were until recently the Chair of the Norwich Design Quality Panel.

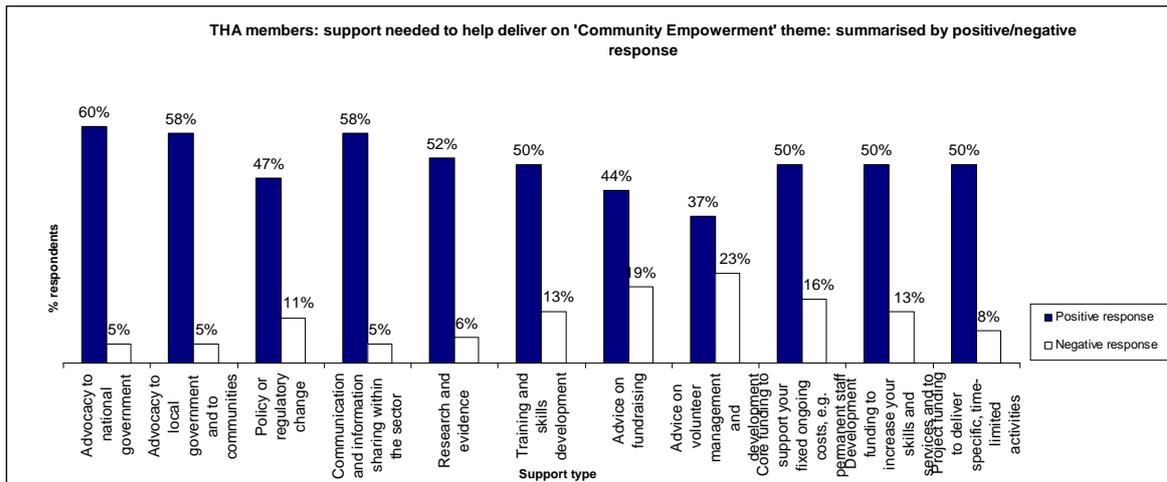
Other frontline work areas reported included inputting to local planning practice, by Civic Voice ('drawing up design guidance, conservation area appraisals/management plans, local lists, supplementary planning guidance, vision statements').

16. What kind of support could help your organisation to better deliver such work?

44 respondents (40 THA members) responded to this question. While responses to all support areas were positive on balance, the highest number of respondents (overall and amongst THA members) perceived advocacy (national and local) and funding (core, development and project) as 'very helpful' support areas in helping them deliver on the 'Community Empowerment' theme. THA members particularly value core funding.

Summarising the responses as positive (very helpful or helpful) or negative (not needed), reveals that support in terms of advocacy and communication and information were considered the most positively amongst the entire response group and THA members. The highest number of responses, for all respondents and THA members, which stated that a support area was not needed were for advisory support (on fundraising and, especially, volunteer management), which also attracted the least positive responses.





17. Do you have any specific comments on your organisation's support needs?

10 respondents provided additional comments here, of which 9 were THA members. A wide range of support areas were highlighted, broadly related to capacity, communication, funding and policy.

In terms of capacity, the Battlefields Trust commented that community empowerment was 'not really our core area at present, but one that we could move into if given the capacity', and Heritage Afloat reiterated their comment on capacity as stated under the 'Social Action' theme.

Civic Voice emphasised the significance of the 'language and style of communication'; it 'has to inspire and respond to volunteer needs - avoiding technical jargon and being relevant to the emotional reasons why they volunteer and get involved', while the UK Association of Preservation Trusts (APT) expressed their desire to 'provide better guidance to Building Preservation Trusts (BPTs) on the impact of the Localism Bill and opportunities for community groups'.

Core funding was again specified as a support need by the War Memorials Trust ('core funding is vital, we know what to do we just need resources to do it'), Jewish Heritage ('we have no long-term security in terms of funding or personnel') and RESCUE, who stated that funding sources must not bring any sort of compromise: 'core funding (or, indeed, any form of funding) would be useful but not if it limited our capacity to comment without restriction on issues of concern. Any state or private funding that carried even the least risk of compromise would be refused (politely I hope)'.

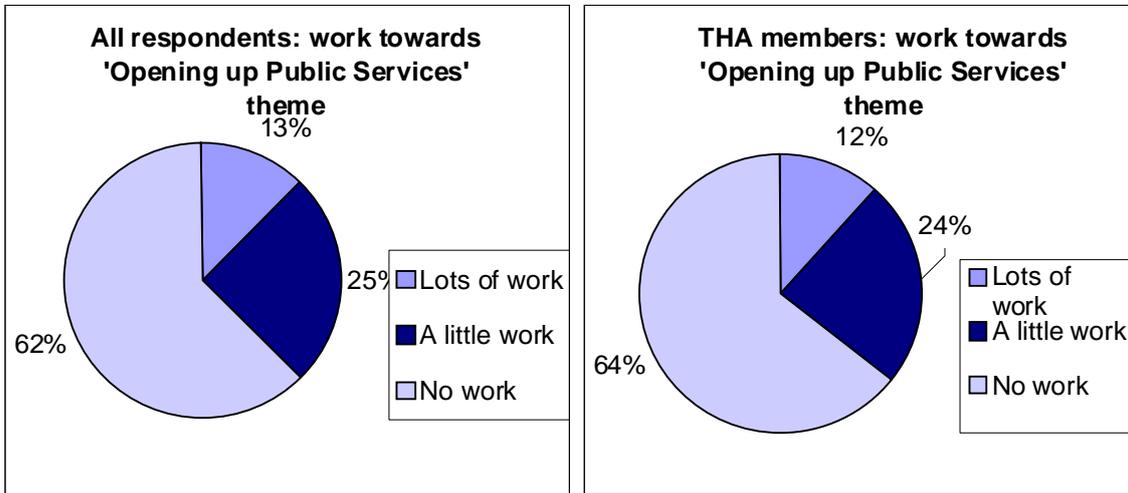
As regards policy, APT are 'concerned' about 'the underuse of enforcement powers by local authorities to enable Buildings At Risk projects to proceed', and the War Memorial Trust believe that a requirement to consult them on war memorial issues could be 'beneficial'. The Mausolea and Monuments Trust commented that paying VAT on building work and fees is 'crippling for a charity/completely voluntary organisation'. The APT require support nationally for Buildings at Risk Initiatives, involving BPTs.

'Opening up Public Services' theme

This theme relates to the delivery of public services or management of public assets by voluntary organisations, or support of others to enable this management or delivery.

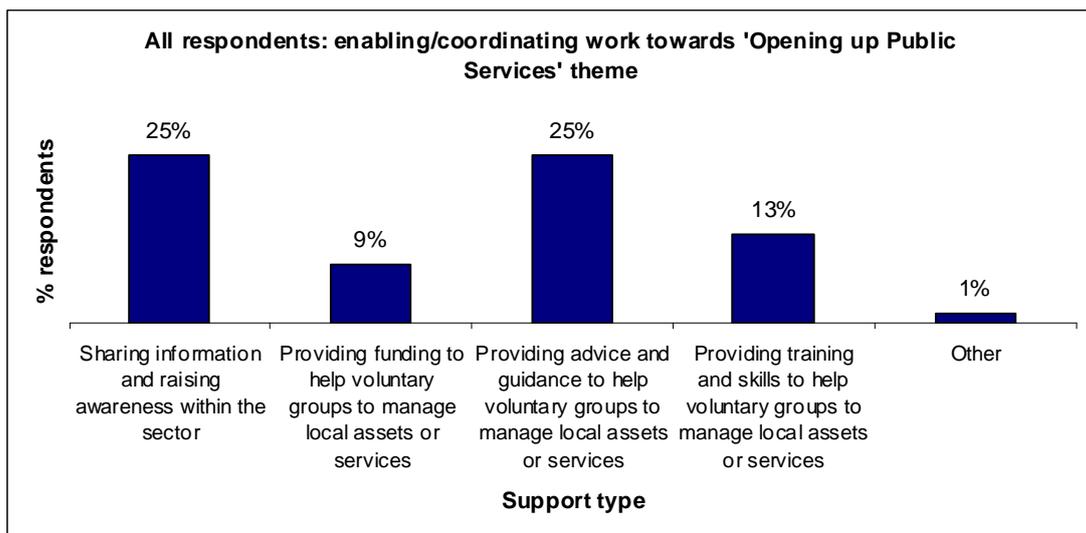
18. Is your organisation already doing work in England which is relevant to the 'Opening Up Public Services' theme, or might contribute towards the government's aims?

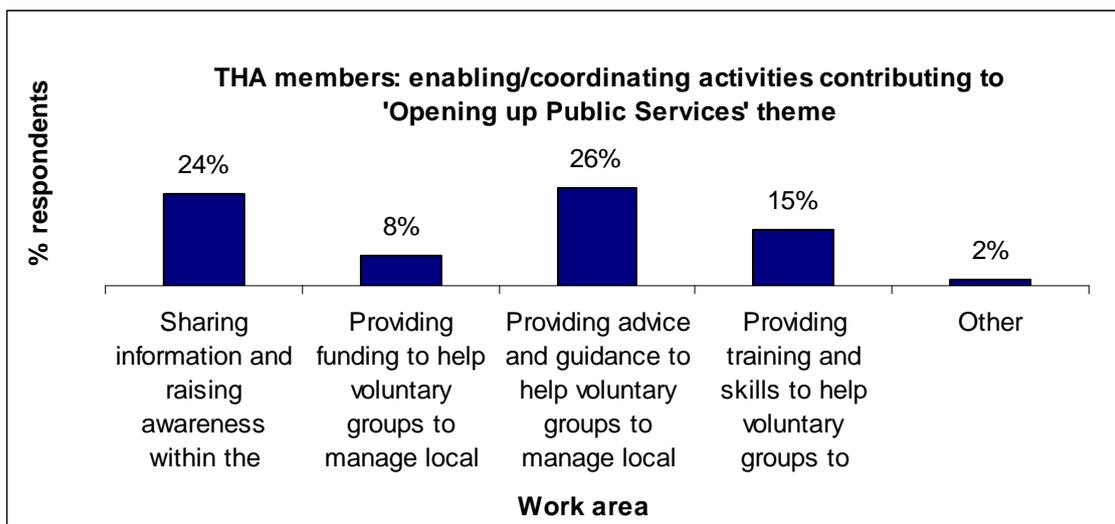
64 respondents completed this question (59 THA members). A minority of respondents (38% of all respondents and 36% of THA members) reported that they were doing work (a little, or lots) in this area. Of those that confirmed they were doing work, the majority described this as 'a little work'.



19. If so, does your organisation undertake any enabling or coordinating activities in this area?

23 respondents answered this question, including 20 THA member respondents. Work was reported in all suggested areas, with sharing information and raising awareness within the sector and providing training and skills to help voluntary groups to manage local assets or services the most commonly reported work areas (both overall and for THA members; advice and guidance was more reported by THA members).





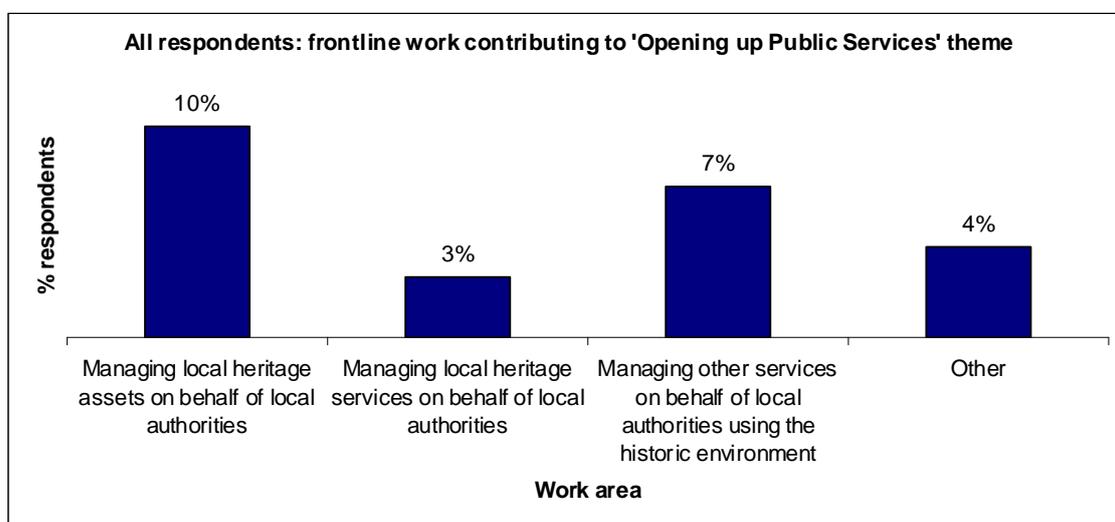
Specific methods of sharing information and raising awareness reported by respondents were through the Architectural Heritage Fund's Asset Transfer Unit, as a seminar topic (Historic Towns Forum), through the Highgate Society's regional federation, and with other groups in the London Borough of Hammersmith and Fulham (Friends of Magravine Cemetery). The Historic Libraries Forum described this as their 'main aim'.

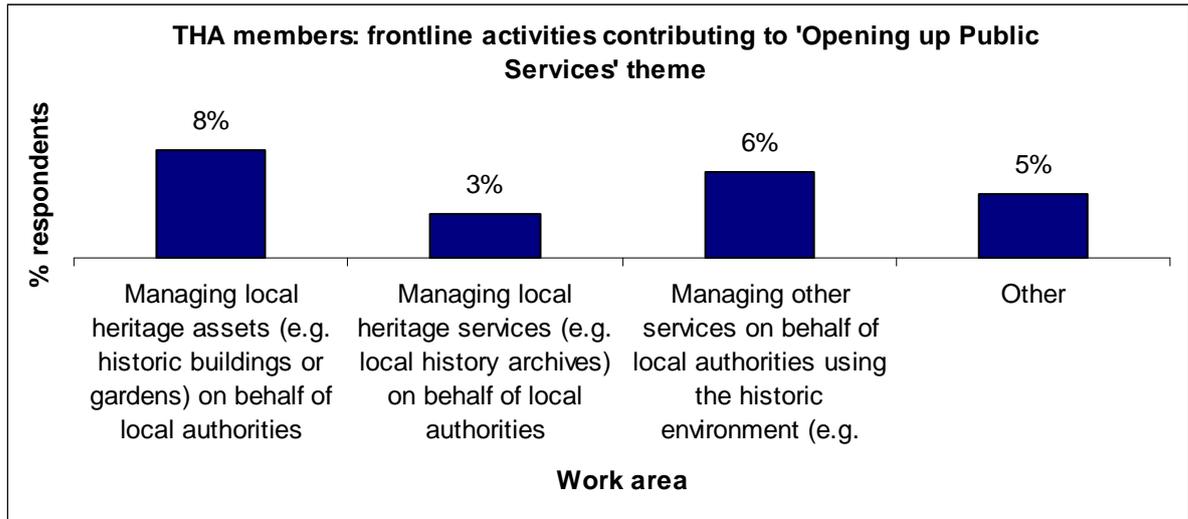
Examples of funding to help voluntary groups manage assets and services included the Friends of Magravine Cemetery's fundraising 'to help leverage a large HLF grant'. A specific example of advice and guidance offered under this theme was given by the Princes Regeneration Trust: 'as part of our work with community groups we give advice on how to manage and run services that the community foresees occurring in the regenerated historic building'. The APT specified that they offer training and skills in this area 'informally through Area Committees'.

No other areas of work were described in addition to those suggested under this theme.

20. Is your organisation involved in any frontline work in this area?

Far less work was reported on the frontline than in an enabling/coordinating capacity for this theme. 11 organisations responded to this question (9 THA members). Work was reported in all suggested areas by these respondents; the most common work confirmed was management of local heritage assets on behalf of local authorities. THA members are slightly less likely to do this, or to manage other services.



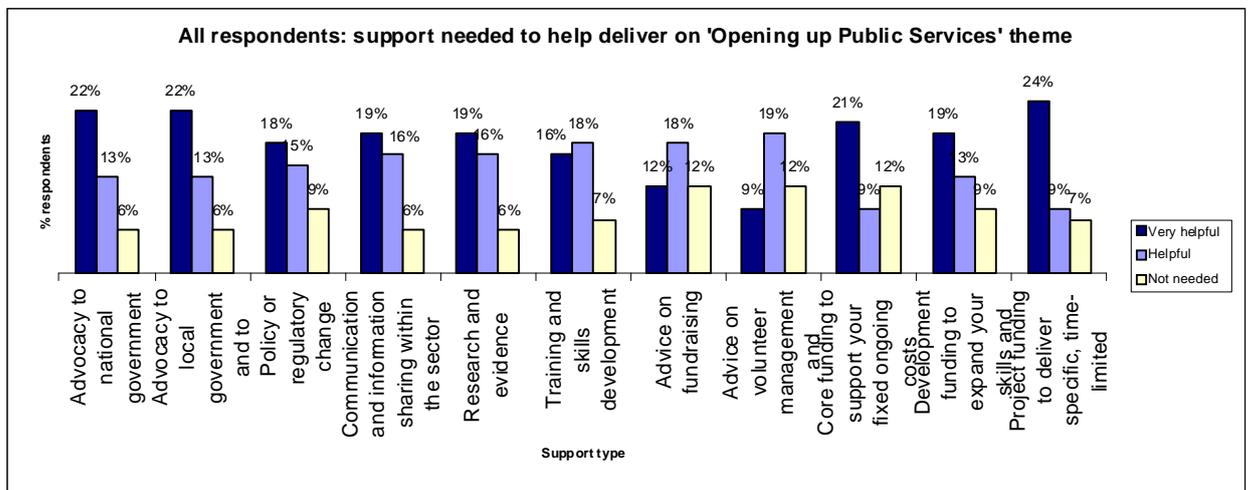


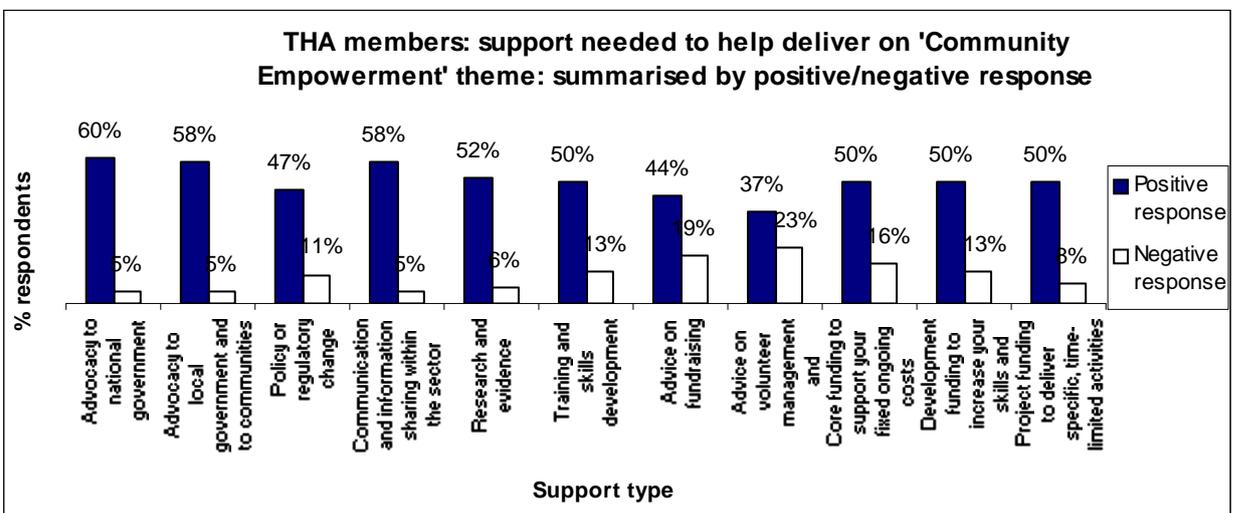
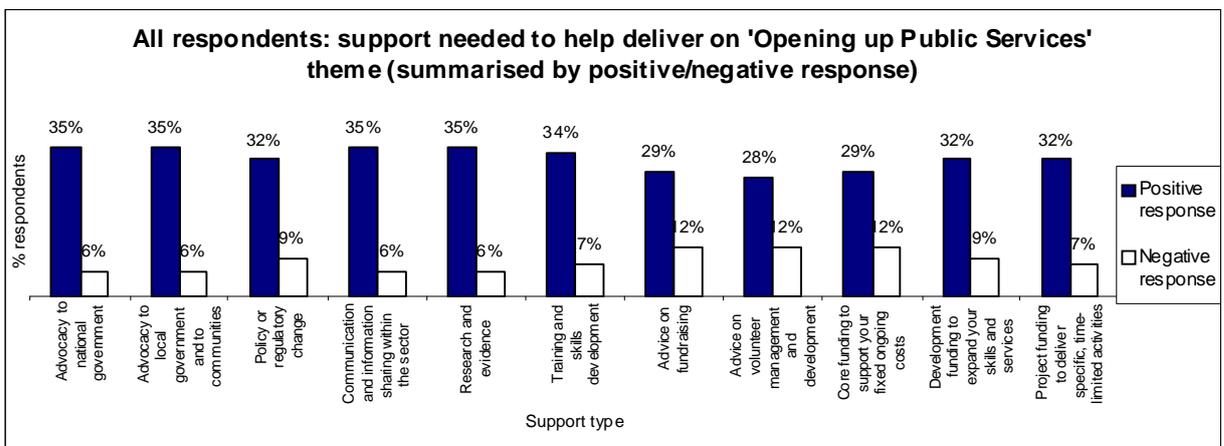
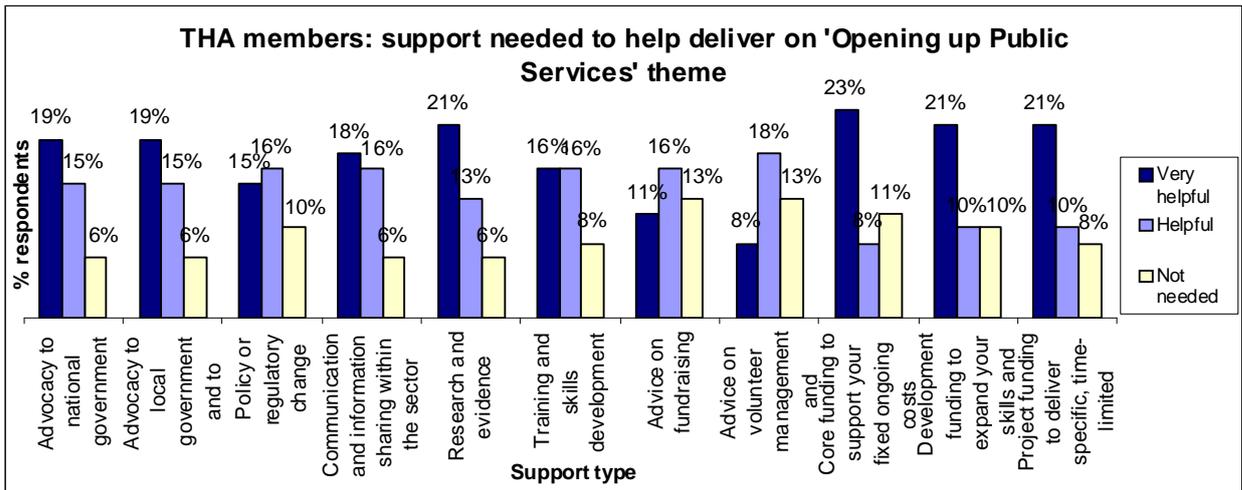
The Church of England Cathedral and Church Buildings Division gave the management of churchyards as an example. In terms of managing local heritage services, the APT reported that some of its members manage local museums, and the Church of England CCD described this as an occasional work area, such as archives in churches. The only specific instance offered of managing other services on behalf of local authorities was 'visiting

work area described by the North of England Civic Trust was 'advisory work to local authorities about historic environment and buildings in their care'. Norwich HEART reported that they 'recently led a major (£20M) regeneration project of a public asset until the local authority decided to stop work on it'.

21. What kind of support could help your organisation to better deliver such work?

29 respondents completed this question, including 25 THA members. As with support for other themes, the overall response was positive to all support types, with opinion not varying significantly for each support type. Project funding attracted the highest number of 'very helpful' responses by a small margin for all respondents, while core funding had the highest response for THA members. When 'very helpful' and 'helpful' responses are combined to compare negative and positive response, responses are very evenly distributed, with advocacy (to local and national government), communication and information and research/evidence marginally having the highest number of positive responses and the lowest number of negative (overall and amongst THA members). Advisory support for both volunteer management and fundraising, and core funding, received the highest number of responses stating the assistance was 'not needed' (just advisory support, for THA members).





22. Do you have any specific comments on your organisation's support needs?

10 organisations supplied specific comments on their support needs for opening up public services, 8 of which were THA members. Policy change and governmental support was a key area, with the Mausolea and Monuments Trust again mentioning VAT (a lower rate on professional services) and the Highgate Society requiring that local and national government recognise them and other support organisations as 'valuable assets... which should be an integral part of the local planning system'. The APT view asset transfer as a 'key area for BPT

involvement': 'more support required to encourage active partnerships between Development Trusts and BPTs. Local authorities need to ensure assets being transferred are endowed'.

Norwich HEART feels that more pressure should be brought to bear by national government on local authorities 'which are reluctant to pass heritage assets over to the 3rd sector', however RESCUE did not support the removal of, e.g. planning advice from local authorities or the privatisation of Historic Environment Record functions:

'We look to local and national government to support archaeology and the national heritage, including local and regional museums and archive services as these are the responsibility of the state and should not be placed in private hands, particularly where there is a requirement to make a profit, fund the lifestyles of shareholders or deliver dividends to individuals or businesses'.

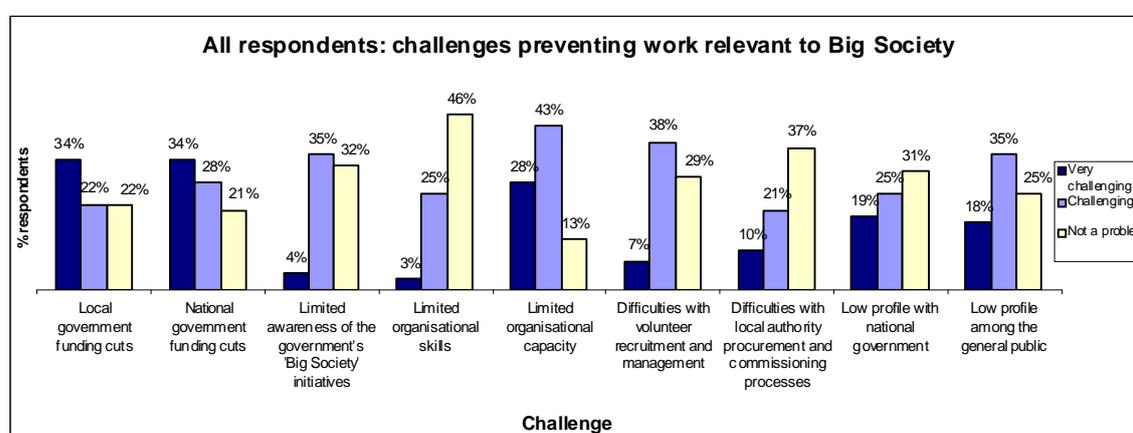
The Battlefields Trust lamented that its capacity 'lags a long way behind our ambitions' in this area of work, and Jewish Heritage noted their 'lack of long-term security in terms of funding or personnel'; the Mausolea and Monuments Trust feel that they need more core funding (for website development).

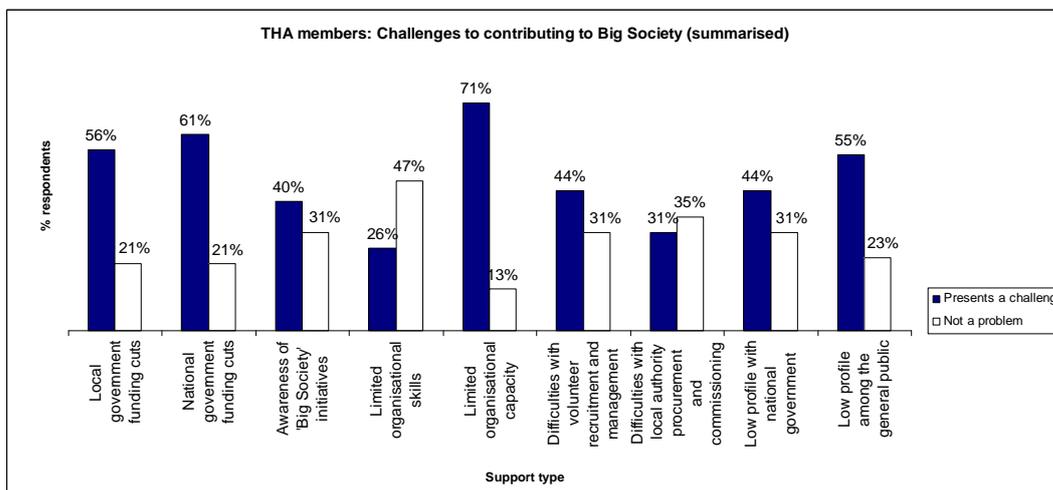
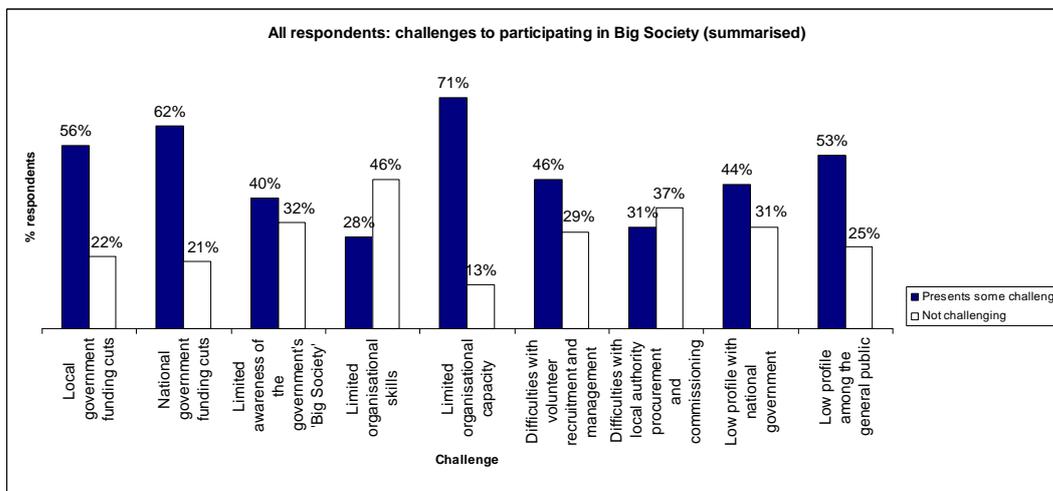
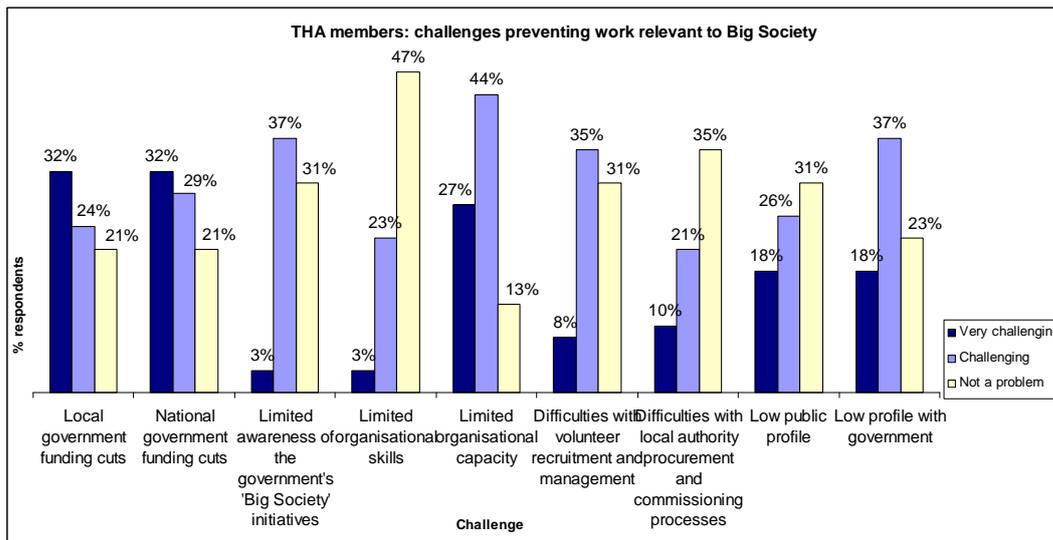
Views on the future

In this section, respondents were asked about the challenges they faced in delivering on all three themes of 'Big Society', and about the outlook for their organisation in the near future.

23. What might prevent your organisation from doing work which is relevant to 'the Big Society'?

59 organisations responded to this question (including 53 THA members). The areas perceived as challenging by most overall ('very challenging' or 'challenging' responses, amongst all respondents and THA members) were organisational capacity, followed by national government funding cuts, then local government cuts. The same issues were felt to be 'very challenging' by most respondents, however funding cuts (by both central and local government) received more responses at this level than organisational capacity. It therefore seems that the capacity is a very common barrier, but not perceived as such a difficult one to overcome as funding cuts. The majority of respondents (including THA members) felt that organisational skills and difficulties with local authority procurement and commissioning processes were not a problem, while difficulties with volunteer management and recruitment also attracted a significant number of responses of this type, although these were still a minority.





24. Do you have any specific comments on the challenges that are faced by your organisation?

22 respondents answered this question, of which 19 were THA members. A key challenge highlighted by the respondents was funding cuts, which bears out the issues revealed by the previous question. The Highgate Society flagged up the loss of planners and conservation officers as a problem: 'the remaining local authority staff have neither the time nor capacity to engage adequately with us', the Friends of Magravine Cemetery 'face the issue of how far to take up the slack as the local authority service shrinks, do we bid to manage the cemetery

when the present contact with Quadrion ends in 2015?', and Heritage Afloat highlighted the threat of reduced resources to the HLF and National Historic Ships, which several member organisations rely upon for project funding, although this will rise after 2012. The Historic Chapels Trust cited English Heritage funding cuts and the change in Listed Places of Worship Grant scheme, and the Historic Towns Forum noted the knock-on effect to the private sector from the funding cuts. The Heritage Crafts Association reflected further upon core funding: 'we need support with organisation, fund raising, data processing, finance, publicity etc. We have no money to pay for any of this and so rely on volunteers. Some form of substantial core funding is essential'.

RESCUE identified government engagement as a key challenge, 'getting Ministers and civil servants to listen to what we and others are actually saying and to respond in a way that promotes dialogue would be a huge step forward'. They view this as an ongoing issue irrespective of which political party is in power, and think that this could be resolved by government responding 'in a way which promotes dialogue'. The Ramblers Association feel that local government activities are a challenge: 'we could be doing a lot of work with the LA's but just as we are trying to help they seem to be putting more barriers in the way', and HEART see 'local Government's disinclination to outsource' as a key issue.

An area brought to light by 3 respondents is engagement with the public and membership; both Derbyshire Archaeology Society and B'nai B'rith wish to recruit younger members, the former stating that

'Like many small local charities, the organising council is now aging and new active members are hard to come by - because of work commitments etc. Whilst the membership is large - active members are about 10 -15% - the rest come to our lectures and visits and/or read (our annual Journal'.

ICON are 'very keen to build' on their contribution to Big Society: 'we are a professional membership body and as such we are already encouraging volunteering amongst our members, the next step is to encourage volunteering in conservation amongst the public'.

The War Memorials Trust feel that 'understanding what Big Society means' is a problem. The National Association of Road Transport Museums identify capacity as a barrier to progress, citing 'lack of human resources for the organisation's ambitions'.

25. Overall, what do you think your organisation will be able to achieve over the next few years?

63 respondents, including 57 THA members, answered this question, and revealed a remarkably optimistic outlook. The majority of respondents expected both their range of projects and the amount of activity to increase, and while many expect activity to remain the same, very few (all of whom are THA members) foresee a decrease in activity.





26. Do you have any specific comments on what your organisation will be able to achieve over the next few years?

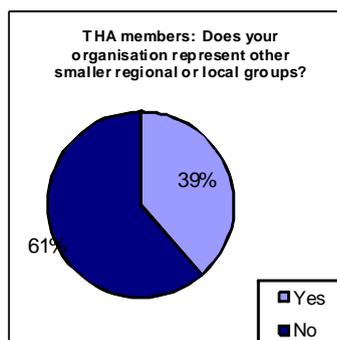
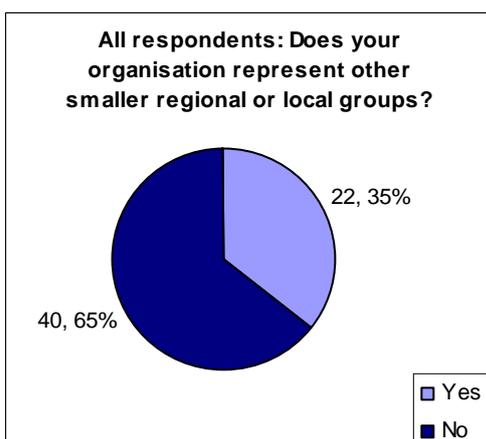
There were 22 responses to this question, 19 of which were from THA members. 4 organisations (B'nai B'rith, Battlefields Trust, Heritage Afloat and Rescue) expected to expand their membership or activities, for instance Heritage Afloat aspires to set up 'regional sections close to local communities' in England to follow one set up in Wales. The Battlefields Trust hope 'to play the same sort of role for battlefield heritage as does, say, the Victorian Society for Victorian heritage'. The National Piers Society also note that their advisory capacity would increase dramatically if they had sufficient resources to allow employment in this area. RESCUE plan to expand their website into new areas. Both the MMT and HCA aspire to raise public awareness of their activities; the latter want to see heritage crafts reintroduced into both schools and offered as an adult training opportunity.

Regional and local groups/branches

Some of the respondent organisations have smaller local or regional member organisations or branches. Here, respondents were given the opportunity to either respond on behalf of these organisations, or to supply contact details so that they could be sent a link to an abridged version of the questionnaire, containing only these questions. The answers from both sources (21 answers on behalf of groups, 2 directly from representatives) have been amalgamated.

27. Does your organisation represent other regional or local groups? For example, in the way that the Association of Preservation Trusts represents Building Preservation Trusts around the country?

Of the 62 (57 THA members) respondents that answered this question, 35% of all respondents and 39% of THA member respondents confirmed that their organisation represented regional or local groups.



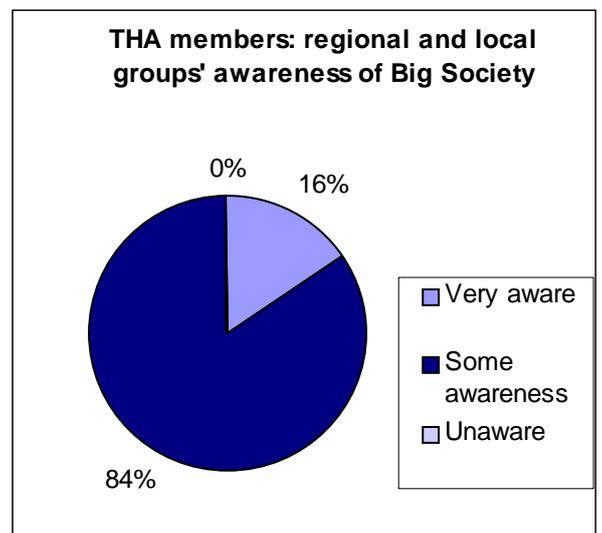
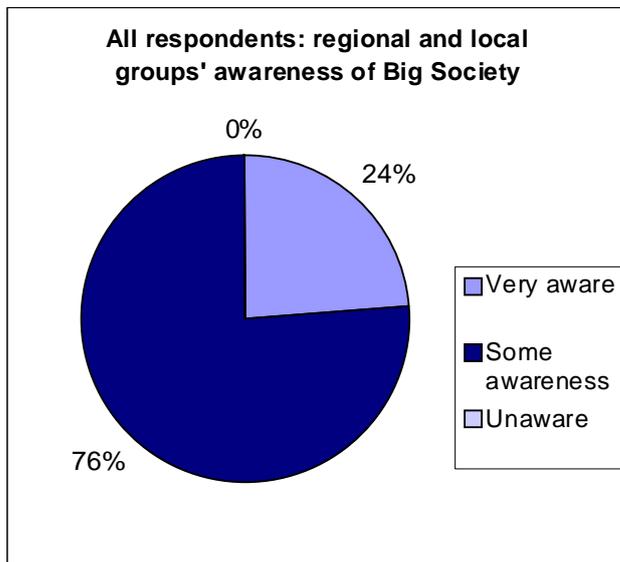
The following questions were answered either by these respondents on behalf of their regional or local groups, or by the groups themselves.

28. If you do not feel able to respond on their behalf, please suggest one or two of these groups whom we can ask to complete these questions themselves. Please include contact details.

2 organisations provided details of 4 contact organisations in total, who were contacted and 3 of which completed the abridged version of the questionnaire for local groups.

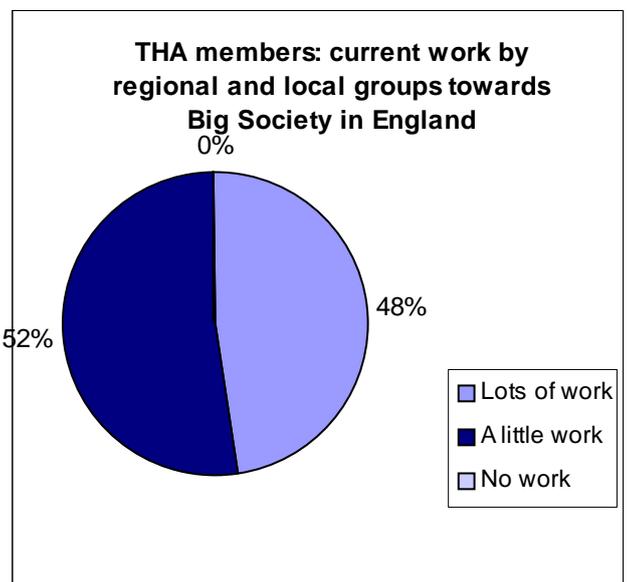
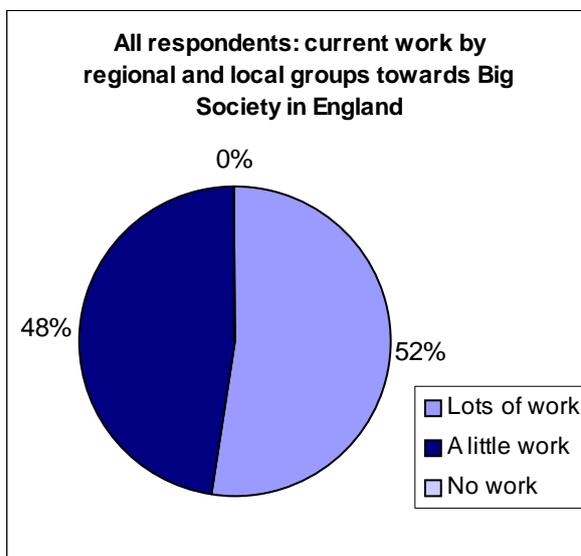
29. How aware are the regional or local groups affiliated to your organisation, of the government's aims for 'the Big Society'?

Of 23 responses (19 THA responses) to this question, the majority indicated that local and regional groups have 'some awareness' of Big Society. No respondents felt that these groups were unaware of the concept.



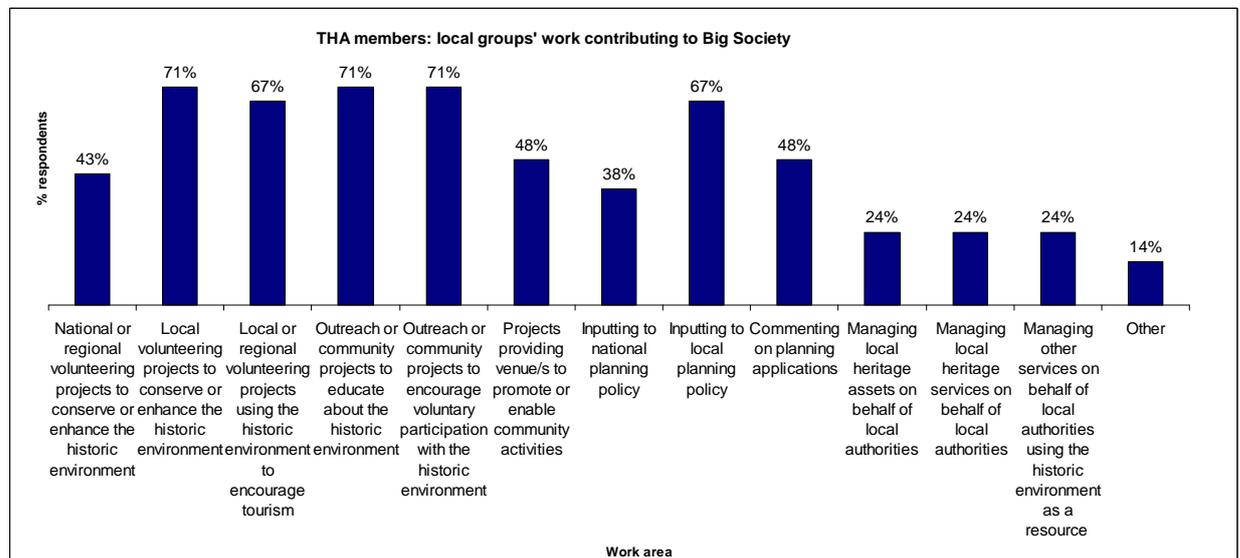
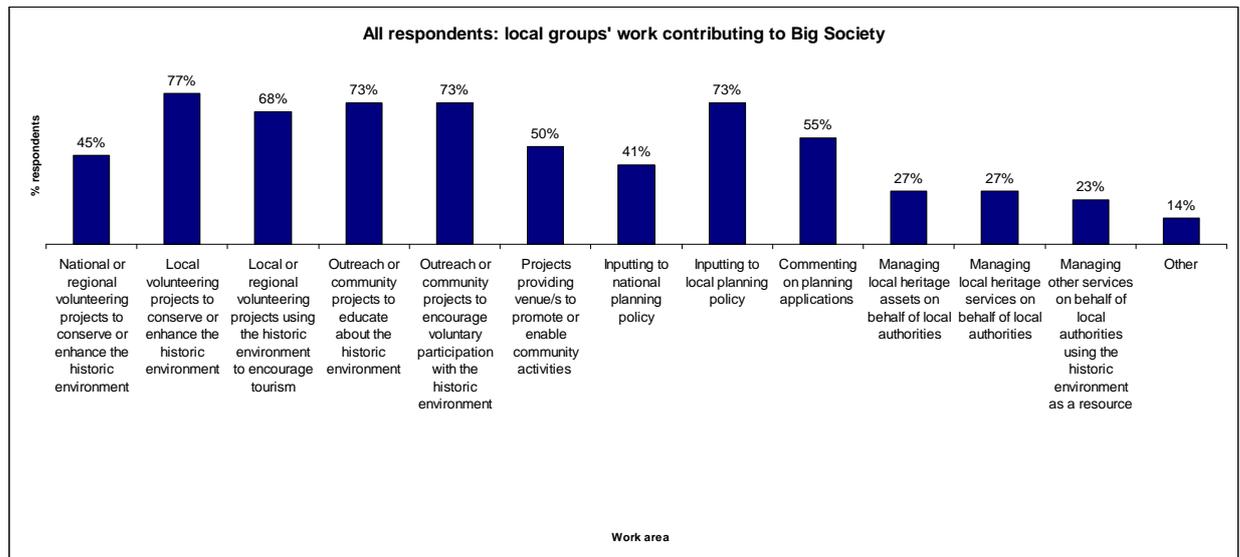
30. Are these groups already doing work in England which is relevant to 'the Big Society', or which might contribute towards the government's aims?

All 23 (21 THA members) respondents felt that these regional and local groups were doing work which contributed to Big Society, with a fairly even number citing this as 'lots of work' and 'a little work' (the slight majority describing 'lots' amongst all respondents, and a slight minority amongst THA respondents).



31. Which activities/projects are these groups involved in?

There were 19 responses to this question, 18 of which were THA members. All work areas were represented, most commonly local voluntary projects to conserve or enhance the historic environment, outreach work (both to educate about and encourage participation in the historic environment), inputting to local planning policy, and using the local environment to encourage tourism. These groups are more likely to be active in all frontline activities than the respondents as a whole, with the sole exception of national or regional projects to conserve or enhance the historic environment, which is not surprising since many would have a purely local remit.

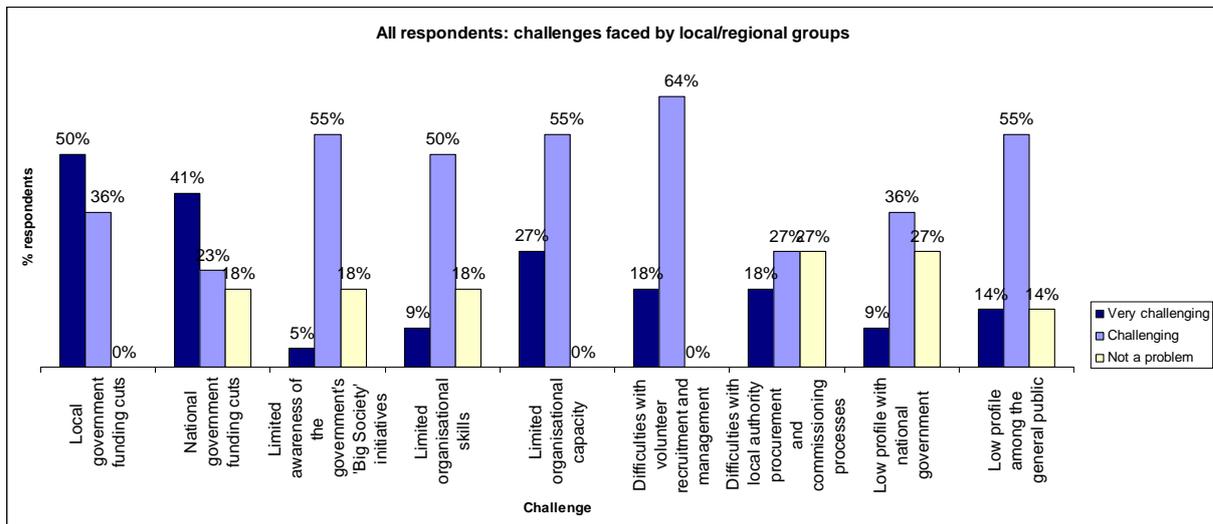


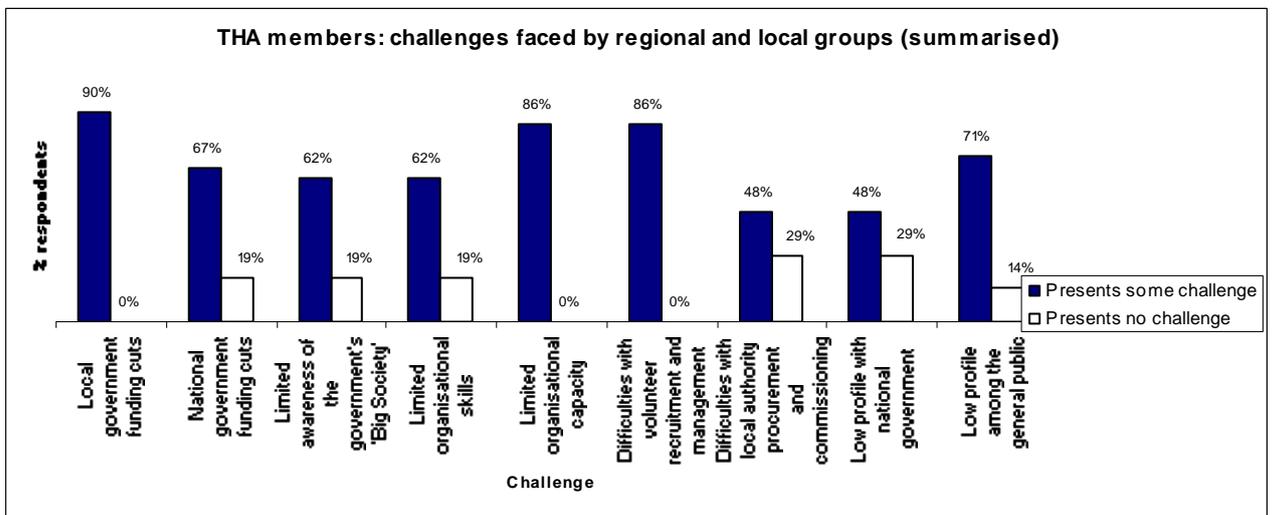
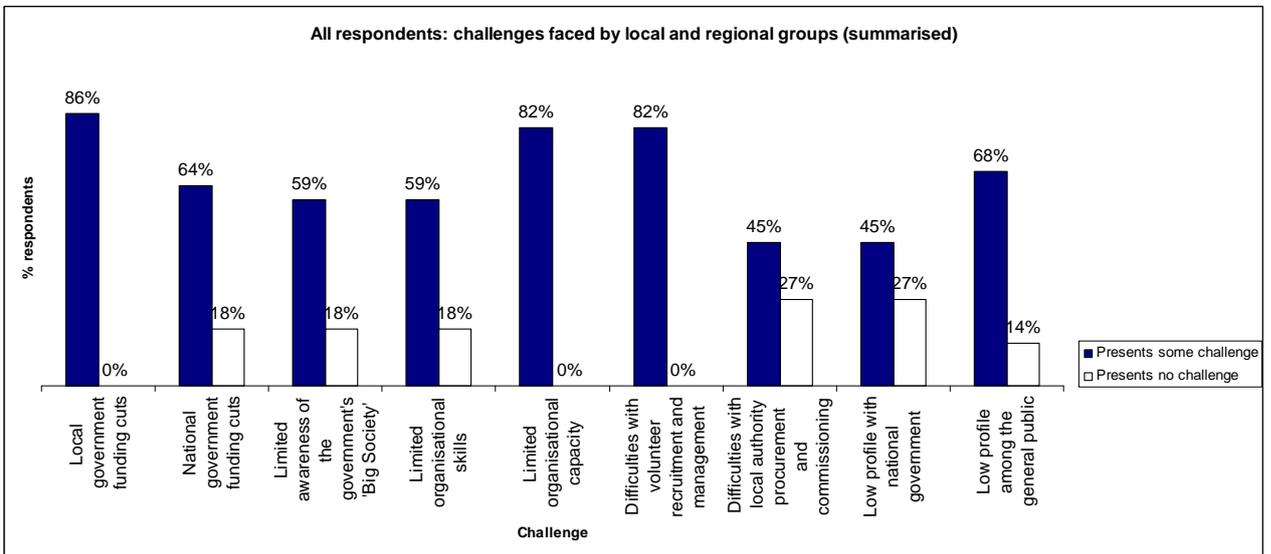
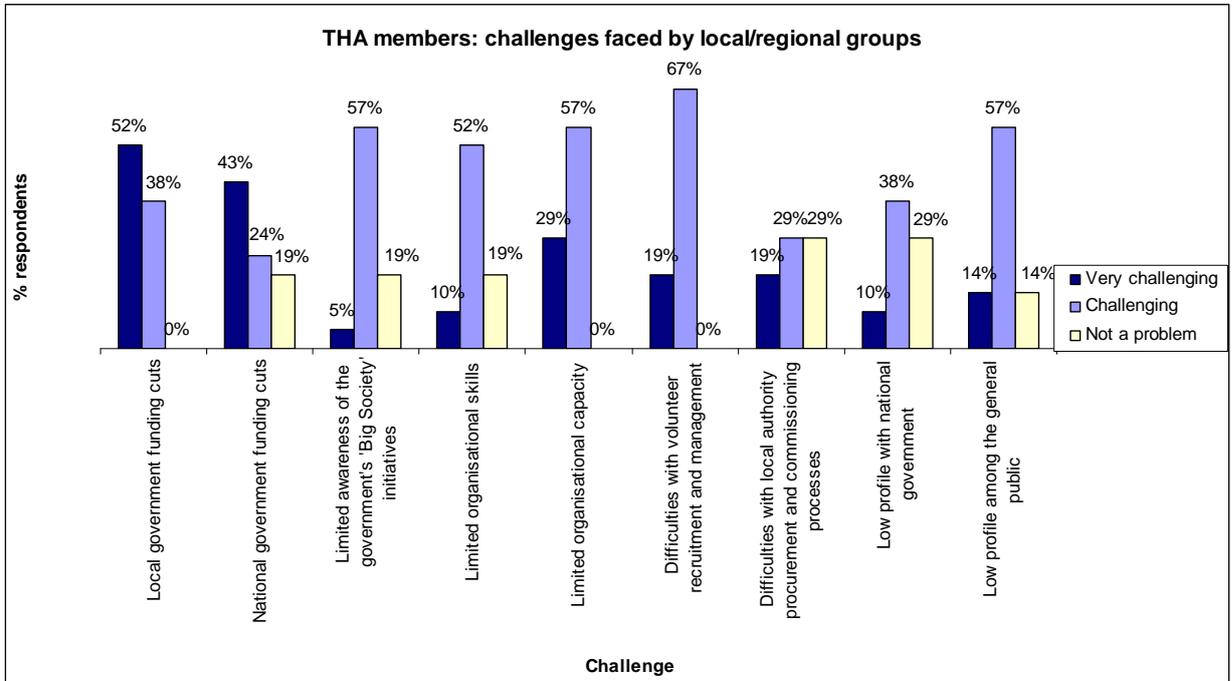
Outreach activity examples included 'event-based enabling educational activities' by IHBC's regional groups, 'school, community and police heritage crime' (Towton Battlefield Society). Cathedrals (Association of English Cathedrals) and a battlefield (Towton Battlefield Society) were given as examples of historic venues used to promote or enable community activities. The latter organisation also confirmed that it collaborated with the local council on planning policy, and managed a local heritage asset and service (Towton Battlefield). The only additional activity example was from CPRE: 'some local groups run annual awards schemes which may, for example, recognise a building which has undergone exemplar conservation work'.

32. What might prevent these groups from doing work which is relevant to 'the Big Society'?

19 respondents described the challenges that the local groups are involved in, including 18 THA members.

All the challenge types suggested were felt to be challenging or very challenging by the majority of respondents, except for difficulties with local authority procurement and commissioning procedures. Funding cuts (both from national and local government, the latter even more so) were felt to be 'very challenging' by the highest number of respondents, followed by organisational capacity. There were relatively few respondents that felt any area to be 'not a problem'; the highest number of these responses were allocated to low profile with national government. Summarising responses reveals the extent to which local government funding cuts (86% of all respondents' more local groups view these as challenging, and 90% of THA members' groups), organisational capacity and volunteer recruitment and management are viewed as challenges. When compared to the overall picture, it is evident that volunteer management and recruitment is viewed as a far greater challenge by regional and local groups than by all respondents (just 46% overall felt this was a challenge), as are local government funding cuts. The areas found least challenging overall (although the majority still found it a challenge) are difficulties with local government procurement and commissioning, and low profile with national government.





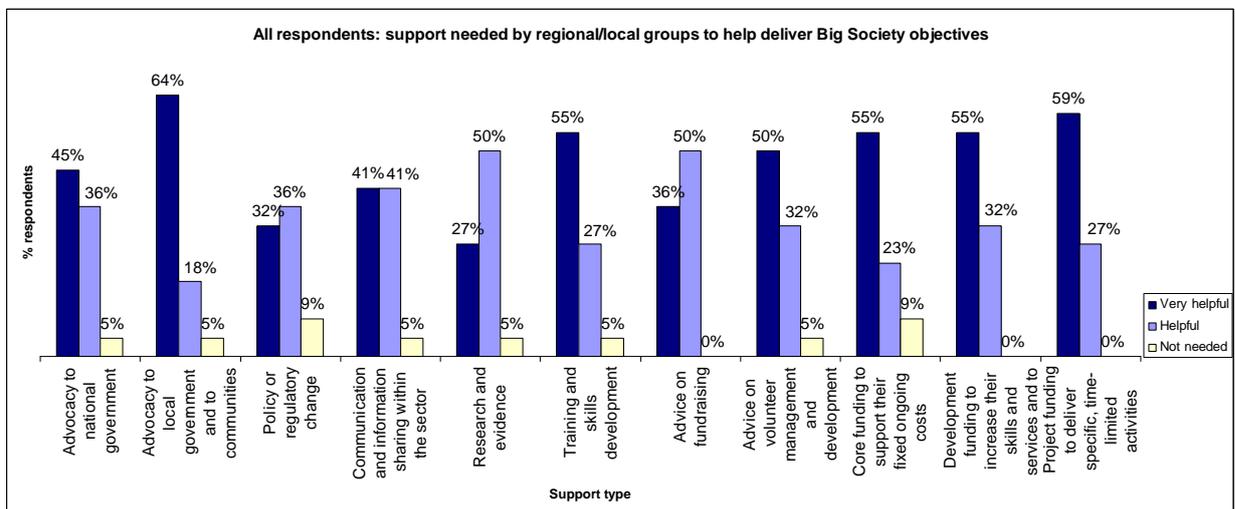
33. Do you have any specific comments on the challenges that are faced by these groups?

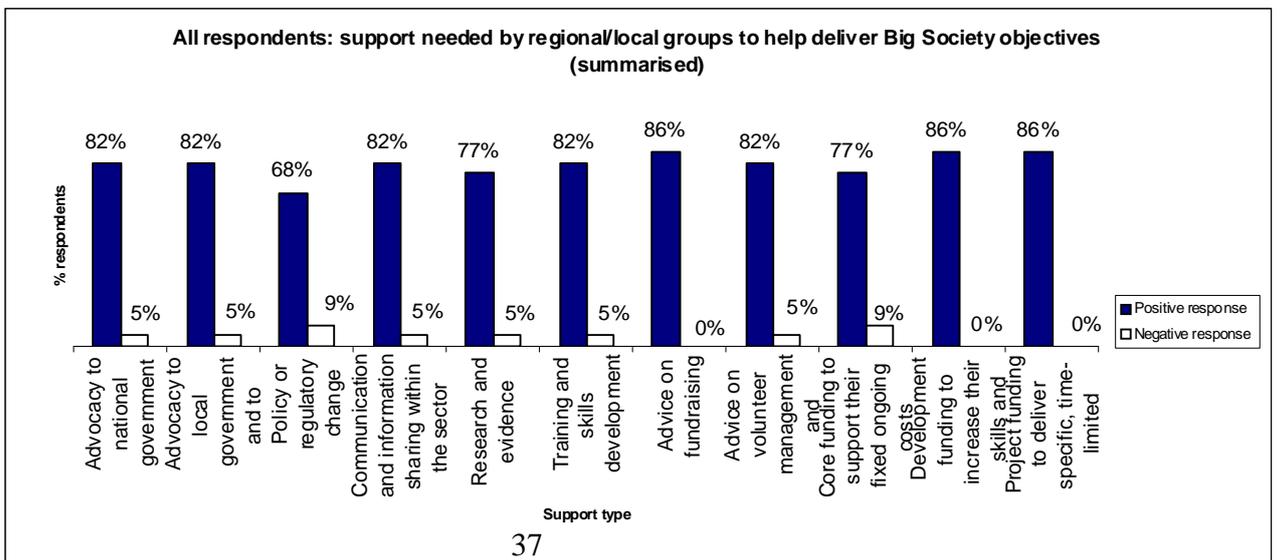
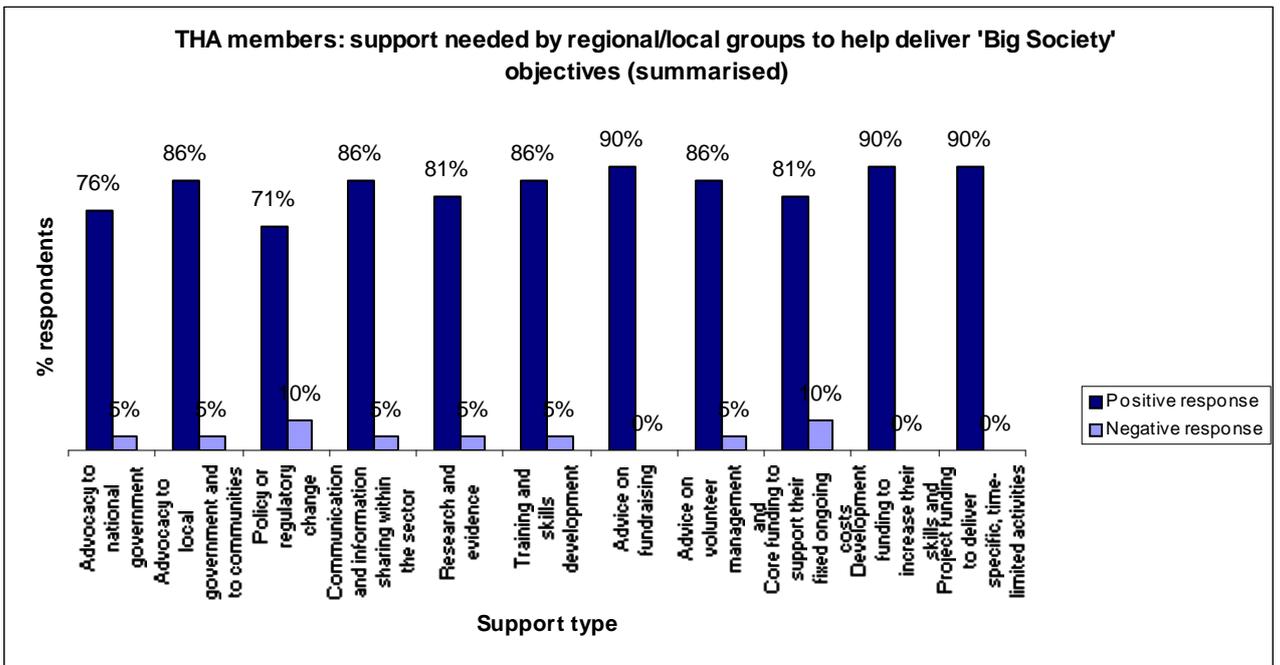
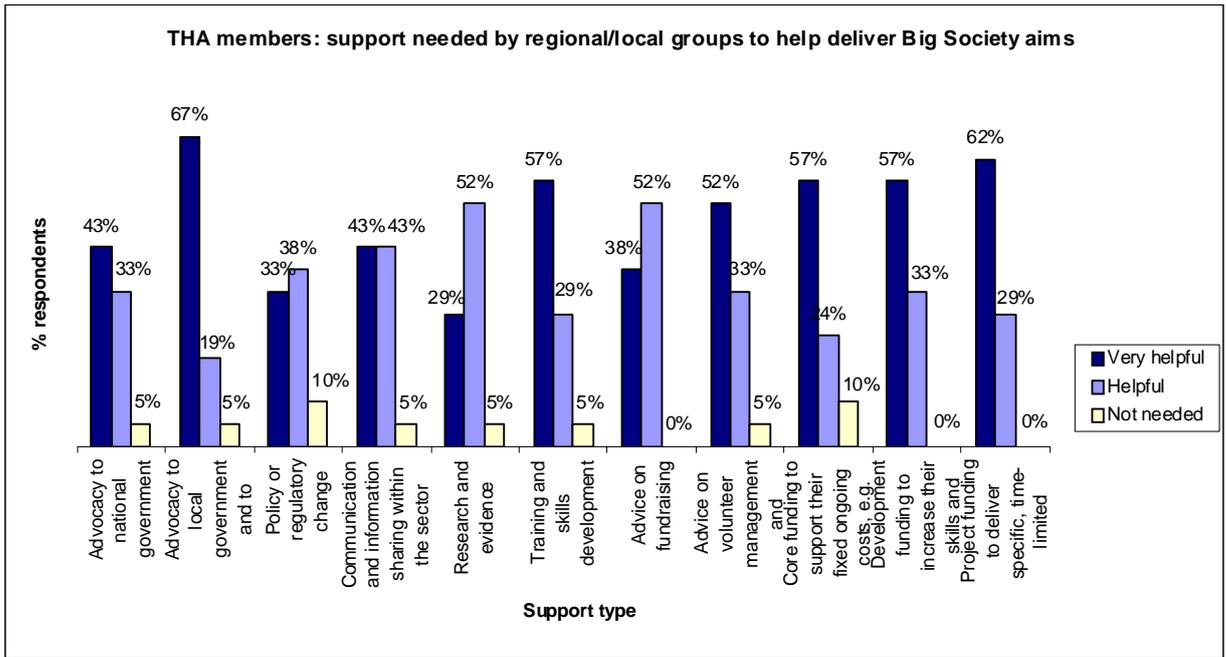
The few specific comments offered covered a wide range of issues:

- There is (almost) no support from outside, so the voluntary activities are largely self-sustaining (Institute of Historic Building Conservation, IHBC)
- Over-regulation of historic vessels, and pressure to redevelop historic waterside sites for new commercial and residential uses make it increasingly difficult to retain adequate support facilities for the nation's historic fleet. (Heritage Afloat)
- To encourage awareness amongst local authorities of Heritage Open Days. (B'nai B'rith)
- lack of legal protection for Battlefields and lack of proaction by local council, need to be more forward thinking (Towton Battlefield Society)

34. What kind of support would help these groups to do work which is relevant to 'the Big Society'?

19 respondents (18 THA members) responded to this question. Overall, support was felt to be needed in all suggested areas by most respondents. The most highly positive responses ('very helpful') were allocated to advocacy to local government, followed by project funding. Summarising support needs by positive and negative responses reveals that responses are very similar, with development funding and project funding and advice on fundraising marginally most popular. The highest number of 'very helpful' responses was for advocacy to local government. Very few respondents felt that any area was not needed (maximum of 2 responses in any category). Summarising the responses as positive or negative produces a very level response rate for all support needs, with development and project funding most valued by a narrow margin. Groups represented by THA members also valued advice on fundraising equally to these. Advice on fundraising and on volunteer management are valued more by these groups than are by respondents overall.



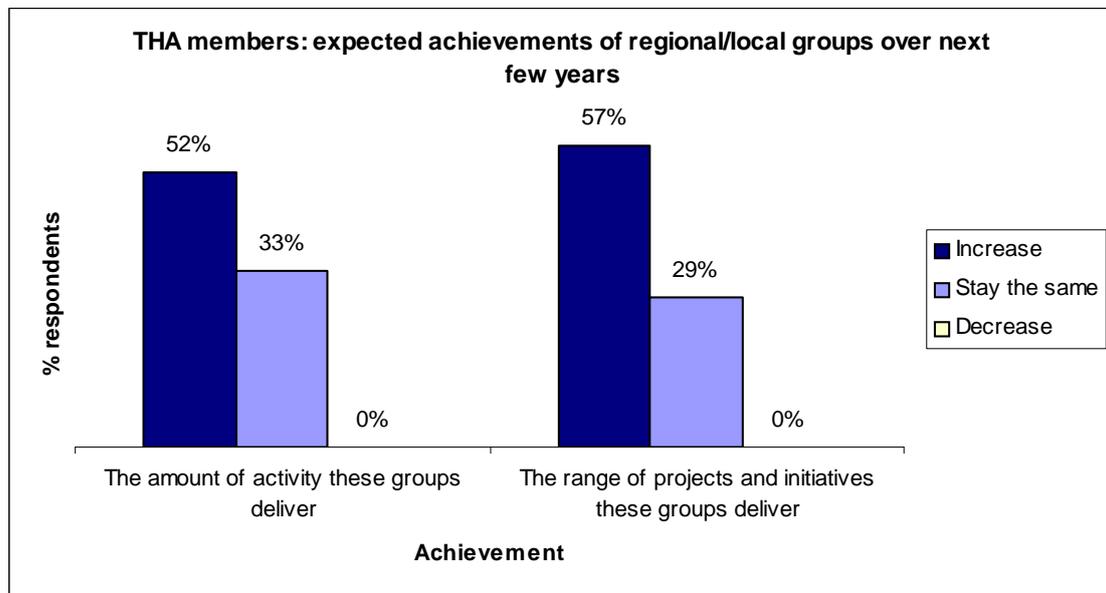
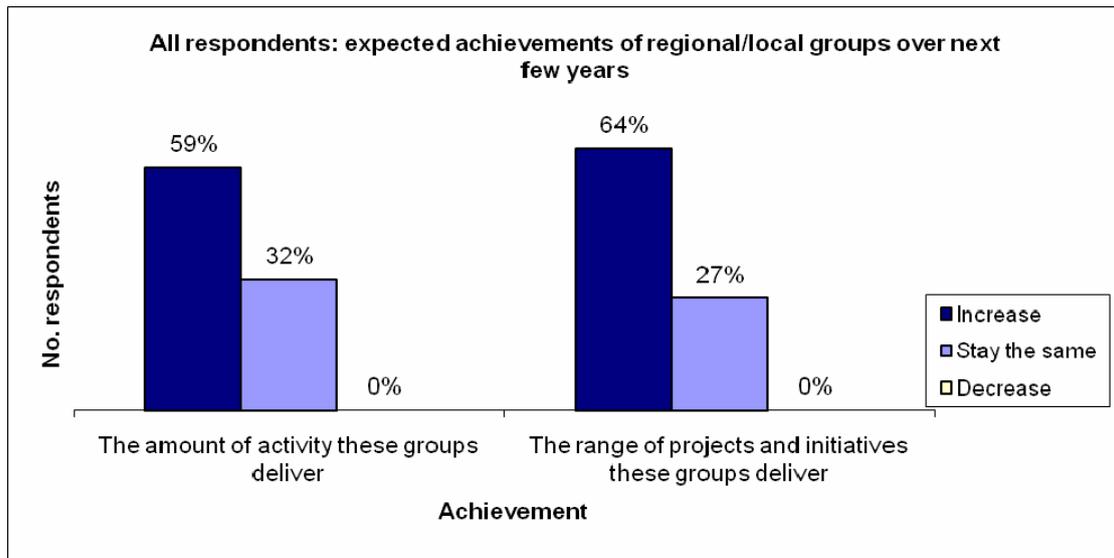


35. Do you have any specific comments on the support needs of these groups?

The only comment on the support needs of these groups was from the APT, on Buildings At Risk (BAR) projects: 'Our response to the HLF consultation advocates a two-tier system of flagship trusts undertaking Buildings At Risk (BAR) projects on a revolving fund basis, with core funding to address BAR programmes systematically as well as provide mentoring and support for single project trusts'.

36. Overall, what do you think these groups will be able to achieve over the next few years?

18 respondents answered this question (17 THA members). All respondents expect the local/regional groups to increase or maintain their activity range and amount over the next few years, with the majority feeling that it will increase. This corresponds to the positive outlook overall, and is in fact even more optimistic.



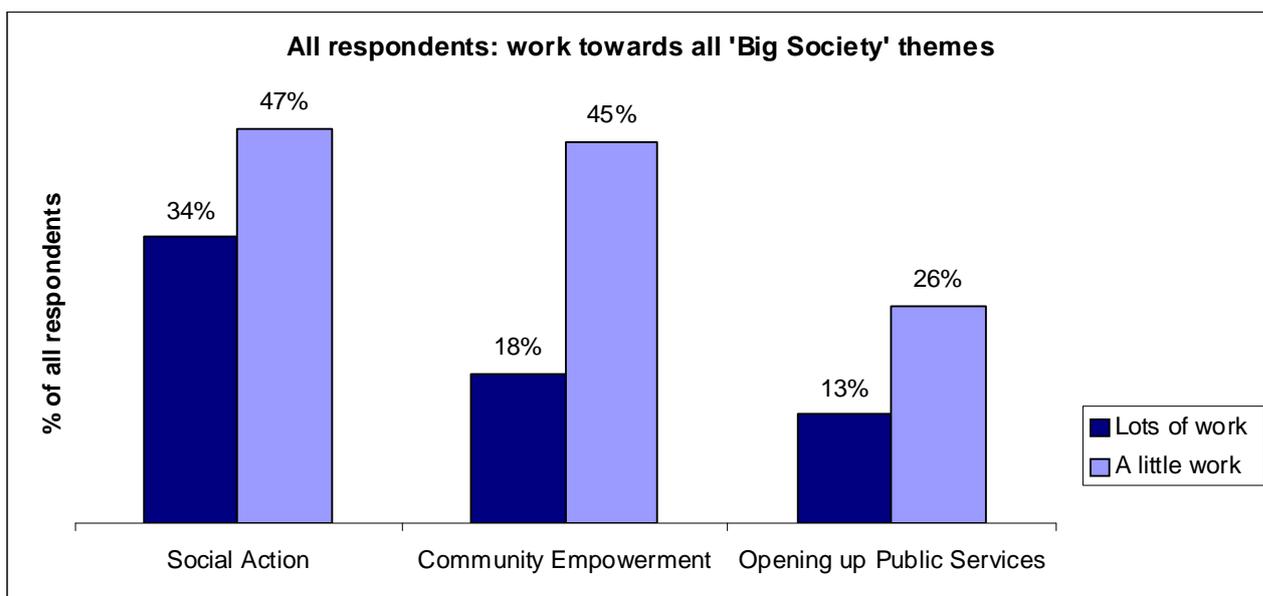
37. Do you have any specific comments on what these groups will be able to achieve over the next few years?

The few comments on the achievements of these groups each touched on different themes:

- Greater strategic integration with BAR programmes to deliver more BAR projects and specifically - more asset transfers - more projects related to THI schemes - more projects in association with new partners such as housing associations and private developers (APT)
- A particular problem is the steady reduction of affordable and accessible dry-docks around England where historic vessels can be overhauled and maintained by their volunteer custodians. The 'Shipshape' initiative from National Historic Ships sets out to address this, but can only do so within a sympathetic local planning climate (Heritage Afloat)
- Raise the importance of Heritage and the built-in environment; its promotion and preservation. (BB)
- Develop our organisation to a community heritage hub, already plans to develop and manage a Battlefield trail, already plans to move into a new display centre, have entered into a Heritage crime partnership with all local stakeholders and much more (Towton Battlefield Society)
- The War Memorials Trust explained that they expected their activities to increase due to the approaching World War I centenary stimulating increased interest.

Comparison: all organisations over all themes, work and support needs

It is firstly evident that the most work is being carried out by respondent organisations under the 'Social Action' theme; which a substantial majority (81% in total, 'lots of work' or 'a little work') report contributing to. Fewer, but still a majority, of respondents are carrying out work towards 'Community Empowerment' (63%), while respondents who confirmed that they are contributing to the Opening up Public Services theme are a minority (39%). 'A little work' is the modal response for all three themes, with proportionally more responses citing 'lots of work' for 'Social Action'.



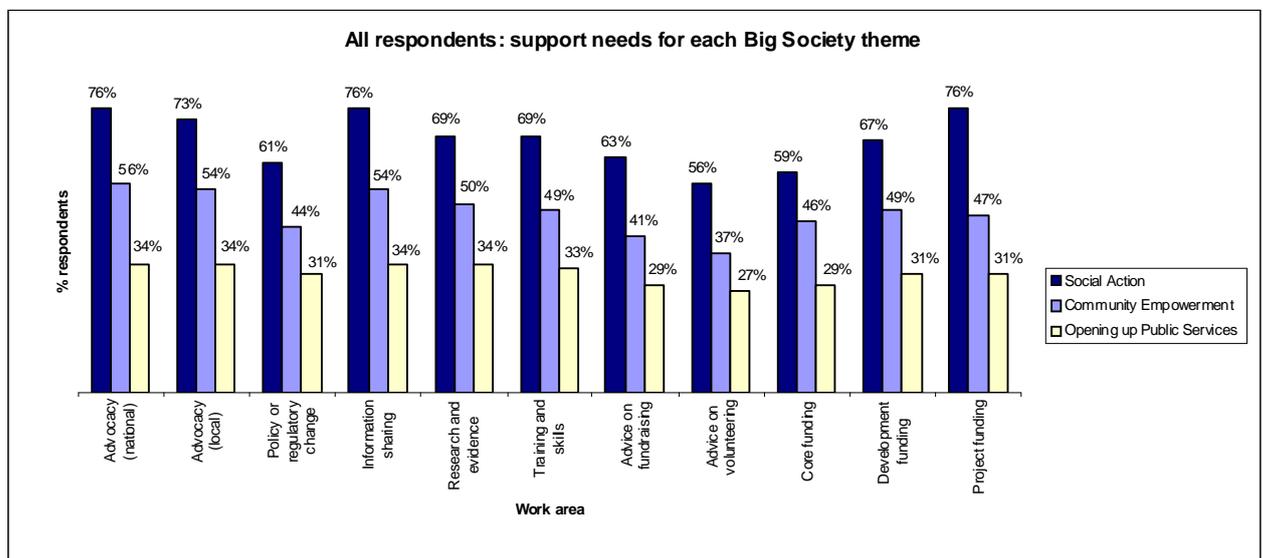
The specific activities confirmed were also mostly under the 'Social Action' theme, and the top five areas of work (reported by between 53% and 74% of respondents) were all enabling/coordinating activities under this theme. The most common of these was offering the opportunity to become a member of an interest group, followed by the opportunity to donate financially and the provision of advice and guidance to local voluntary groups or projects. The most prevalent areas of frontline work were local and regional voluntary projects to preserve or enhance the historic environment, closely followed by national projects with the same focus, then by outreach work to educate about the historic environment. The next most common area of frontline work was inputting to local planning policy and commenting on planning applications, under the Community Empowerment theme. One recurring common work area across all themes was offering advice and guidance, which as well as being one of the two most reported areas for Social Action, attracted the most responses under the Community Empowerment theme and the joint most responses for Opening up Public Services.

Most reported work areas across all respondents

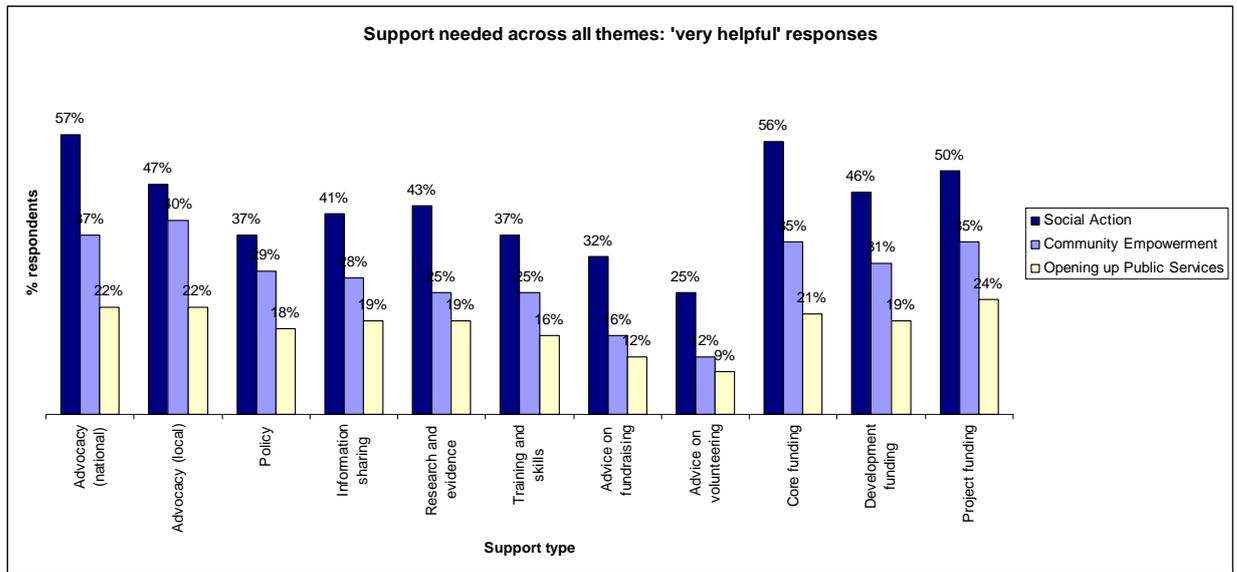
Activity	Response rate (of all respondents)	Theme	Type
Giving people the opportunity to become a member of an interest group or cause	74%	Social Action	Enabling/coordinating
Giving people the opportunity to donate financially to an interest group or cause	63%	Social Action	Enabling/coordinating
Providing advice and guidance for regional or local voluntary groups and projects	63%	Social Action	Enabling/coordinating

Promoting local groups' activities	56%	Social Action	Enabling/coordinating
Giving people the opportunity to volunteer for an interest group or cause	53%	Social Action	Enabling/coordinating
Local voluntary groups/projects to conserve the historic environment	51%	Social Action	Frontline
National/regional voluntary groups/projects to conserve the historic environment	50%	Social Action	Frontline
Providing training for local/regional groups	50%	Social Action	Enabling/coordinating
Outreach or community work to educate about the historic environment	49%	Social Action	Frontline
Commenting on planning applications	47%	Community Empowerment	Frontline
Inputting to local planning policy	46%	Community Empowerment	Frontline
Providing advice and guidance on planning for regional and local groups	46%	Community Empowerment	Enabling/coordinating

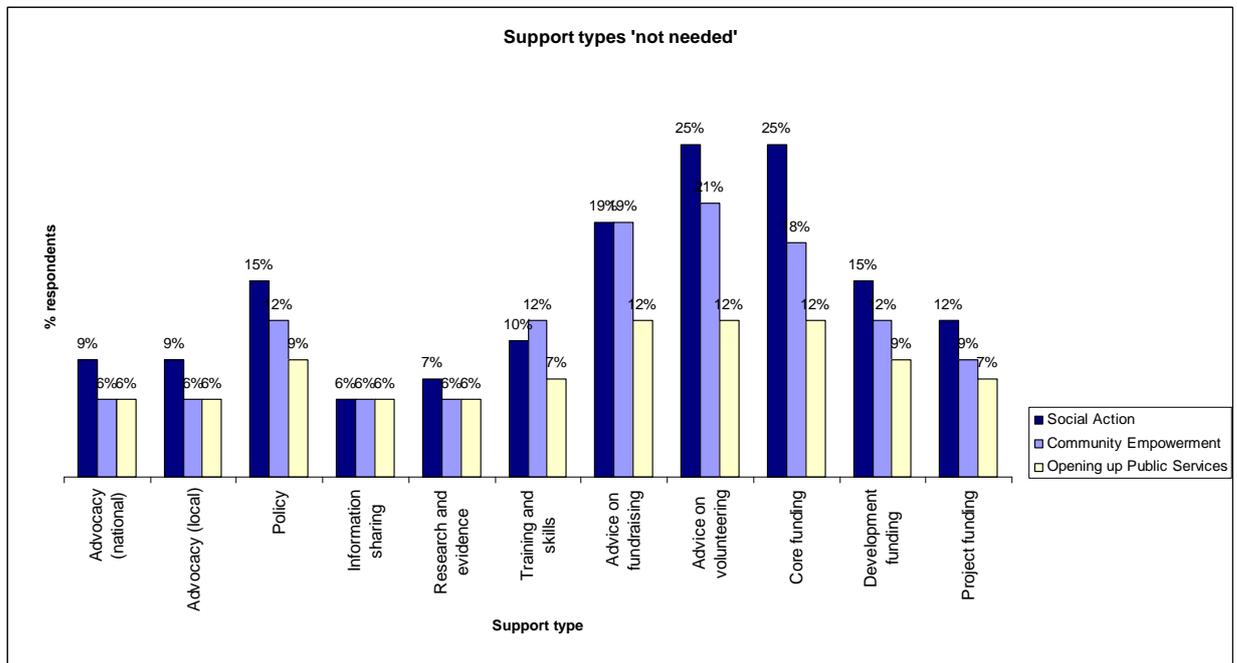
Comparing the support needs across all themes reveals that all suggested support types are valued, with none which are valued significantly more or less overall. The most popular by a small margin (1 response) was advocacy to national government, followed by advocacy to local government and then by communication and information sharing. Positive responses for these three areas of support ('very helpful'/'helpful') follow through all three themes; an additional area which stands out under Social Action is project funding.



When highly positive responses to support types are compared ('very helpful' responses), advocacy to national government is still most valued, but in this case core funding and project funding attract the next highest response numbers, along with advocacy to local government.



Responses stating that support types are 'not needed' are consistently in the minority, for all themes and all support types as noted previously. Advice on volunteer management and development attracted the highest number of 'not needed' responses over all three themes, followed by core funding and advice on fundraising. The least likely area to be perceived as 'not needed' overall was communication and information sharing.

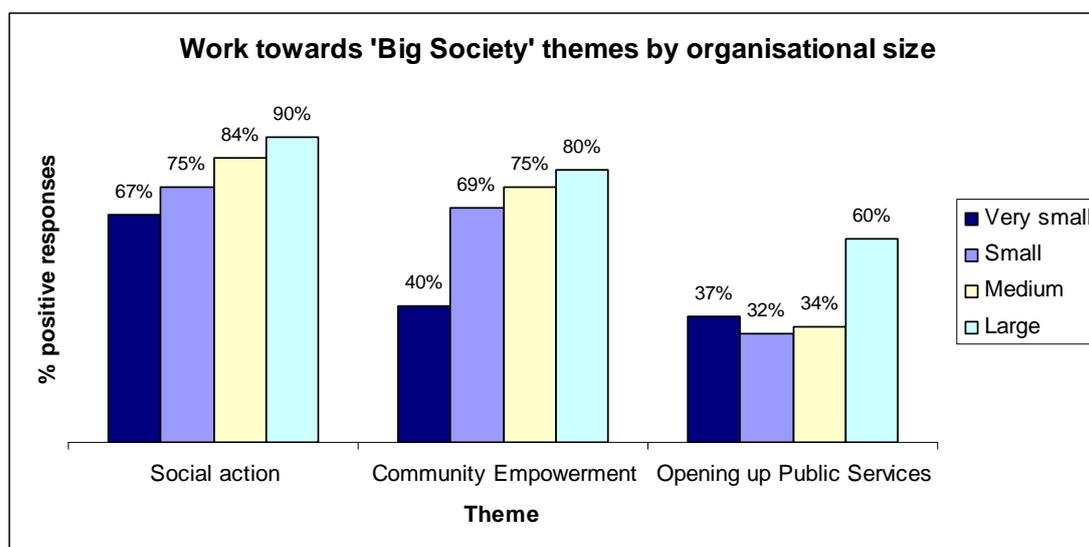


Organisational size and support needs

The questionnaire respondent organisations were categorised by size into four groups using the data provided on numbers of employees and volunteers (Question 3): very small (up to 25 employees/volunteers: 30 organisations), small (26-100: 16 organisations), medium (101-500: 12 organisations) and large (501 upwards: 10 organisations). This figure was based on

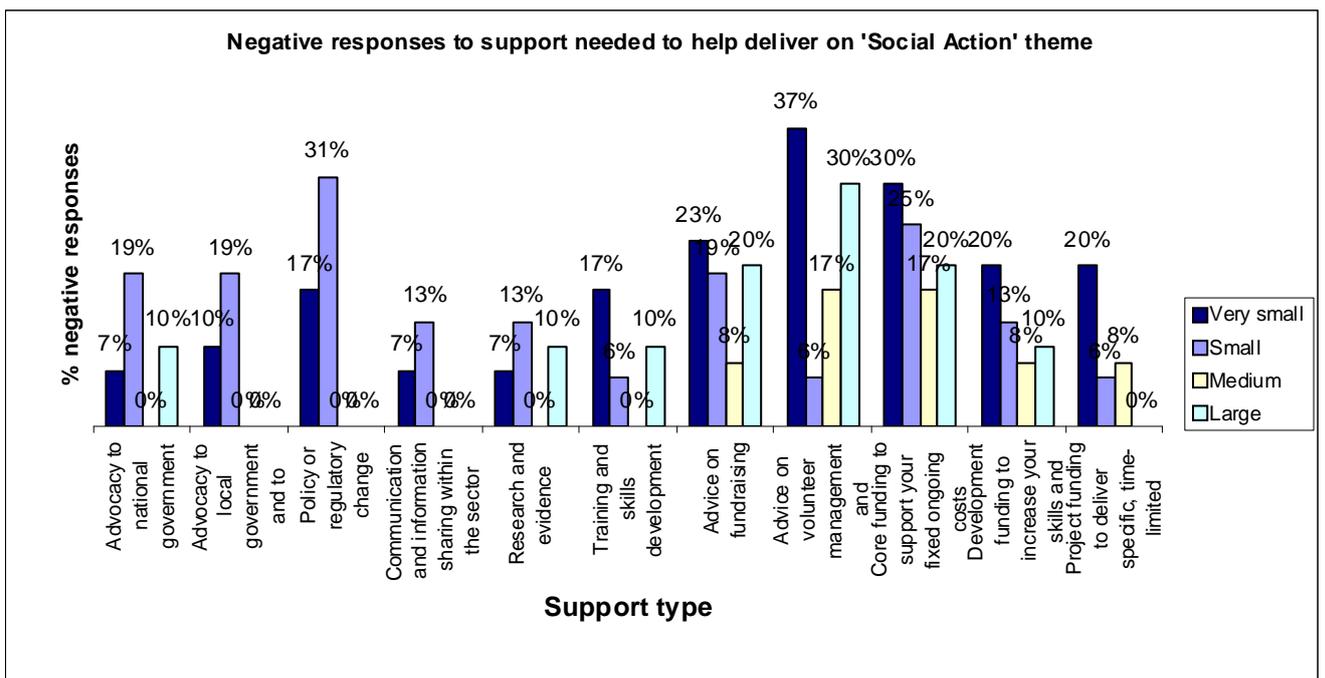
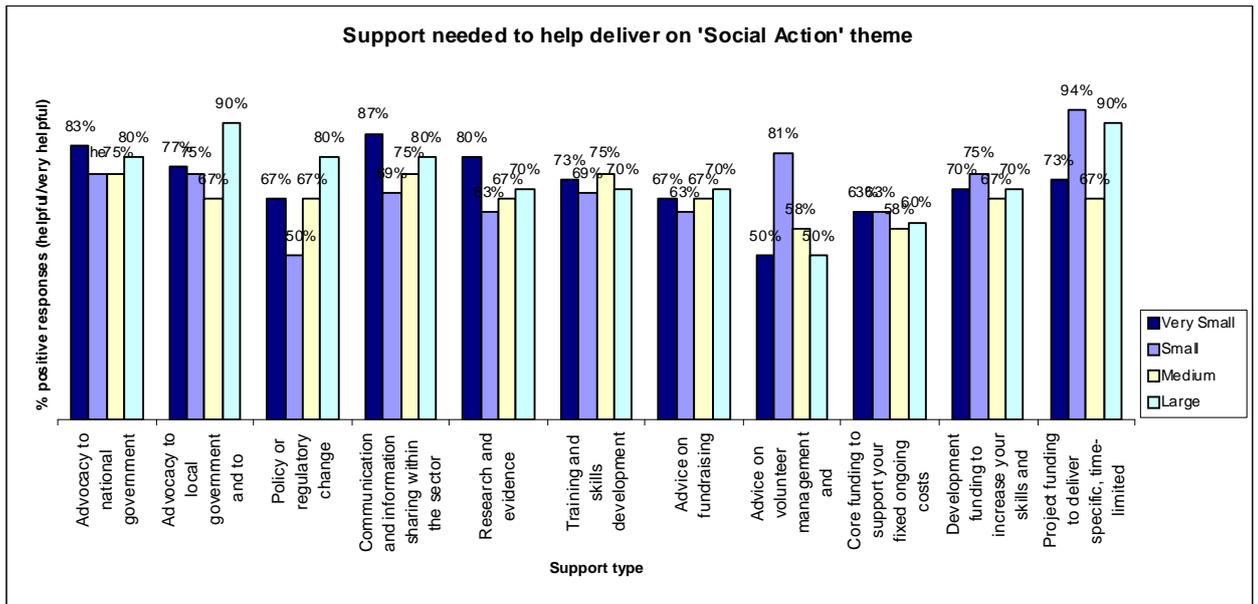
the total paid employees and volunteers working directly for the organisation; as discussed, the figures provided were often approximate, nevertheless the categories should be sufficient for the purpose of enabling support needs to be compared across all themes in relation to organisational size.

Comparing the work done towards each theme (Social Action, Community Empowerment, Opening up Public Services) by each category, it is firstly evident that the larger the organisation, the more work reported under all themes (either 'lots of work' or 'a little'). There is just one exception to this trend, that very small organisations reported slightly more work than either small or medium sized ones (although large organisations still reported significantly more work) towards 'Opening up Public Services'. The most significant contrast is in work towards 'Community Empowerment'; a minority (40%) of very small organisations are carrying out work in this area, while significant majorities of all other groups reported activity. The work by large organisations under this theme is double that reported by very small organisations.

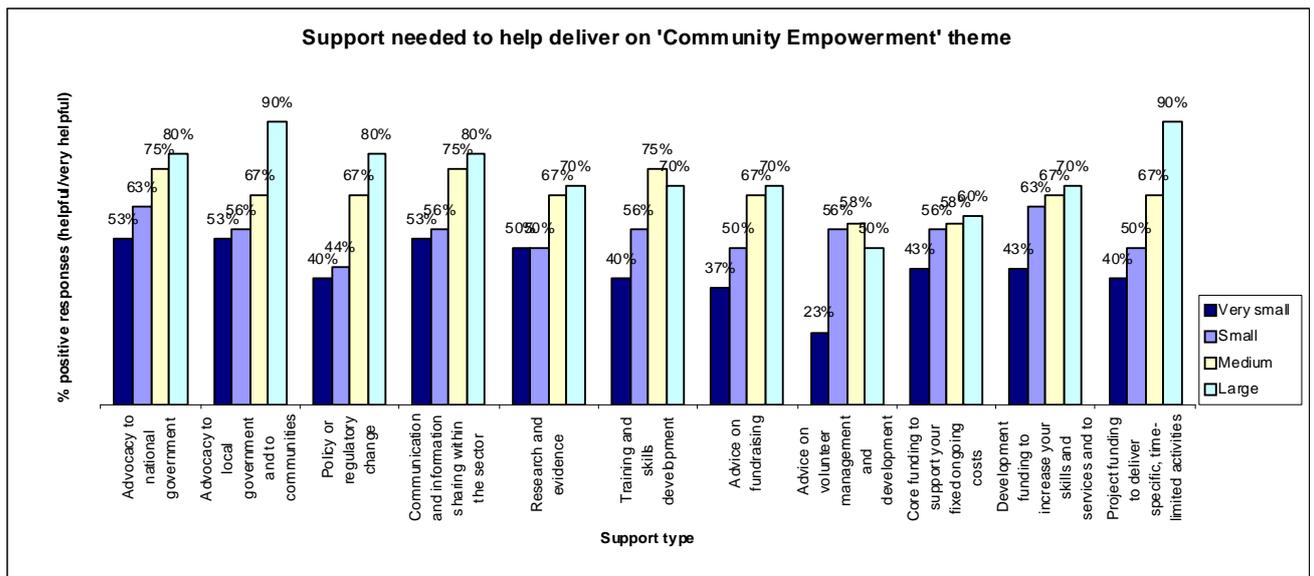


In terms of support needs, it is firstly worth noting that responses to the relevant questions were predominantly supplied by those that had confirmed that they were carrying out work under that theme, e.g. a lower response to all support needs for Community Empowerment and still lower for Opening up Public Services, for smaller organisations was mostly due to the question not being answered, rather than a large number of negative responses (i.e. statements that support was 'not needed'. For clarification, negative responses are also compared below.

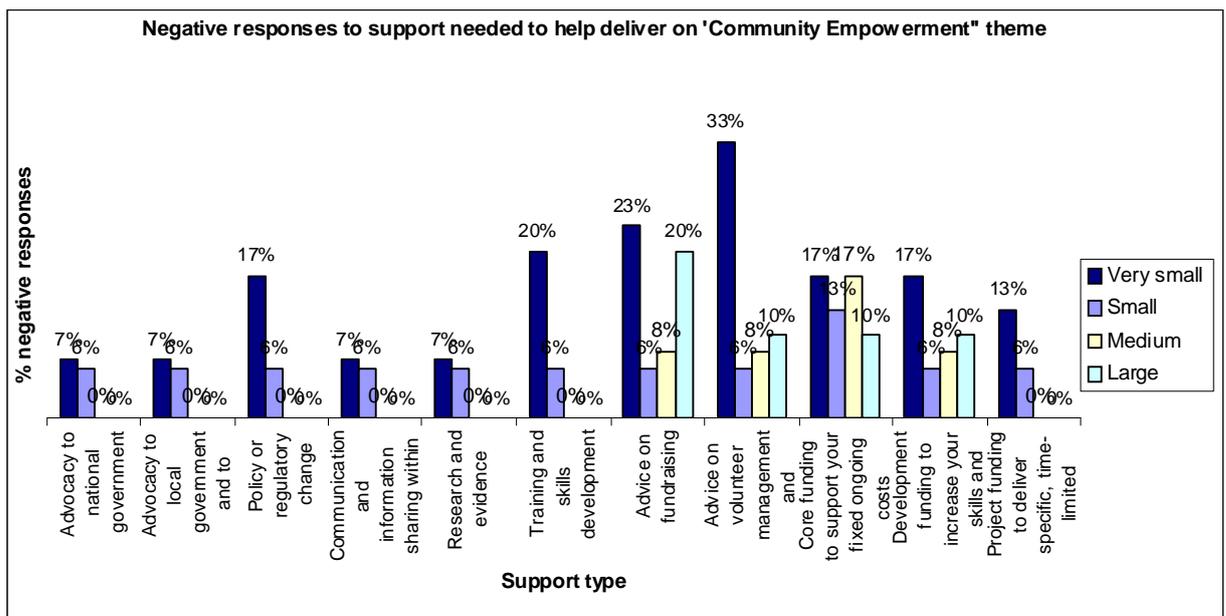
Support needs cited under the 'Social Action' theme did not reveal many significant trends running across support areas from small to large organisations, however it can be seen that large organisations are more likely (90% of respondents) to require support with advocacy to local government, and project funding, and very small organisations with advocacy to national government, communication and information, and research and evidence. Significantly more need is reported for volunteer management by small (26-100 employees/volunteers) organisations than any other size, and the most need for project funding is also reported by the small organisations (94%, the most positive response for a support need by any group). Negative responses demonstrate that small and very small organisations are the most likely to feel that support is not needed in nearly every area, particularly for advice on volunteer management (for very small organisations) and core funding. Small organisations are the most likely to have stated that policy or regulatory change is 'not needed'.



The positive responses under the 'Community Empowerment' theme each increase from smaller to larger organisations, i.e. more respondents from larger organisations feel that a support need is helpful, with only two exceptions – 'large' organisations reported less need for advice on volunteer management and development, and on training and skills development, than medium-sized ones. The general trend is likely to be at least partly due to the responses being fewer amongst smaller organisations, along with activity. Project funding and advocacy to local government are most popular amongst large organisations, and advocacy to both national and local government amongst very small ones. Small organisations favoured development funding, and a number of areas were popular with medium organisations.



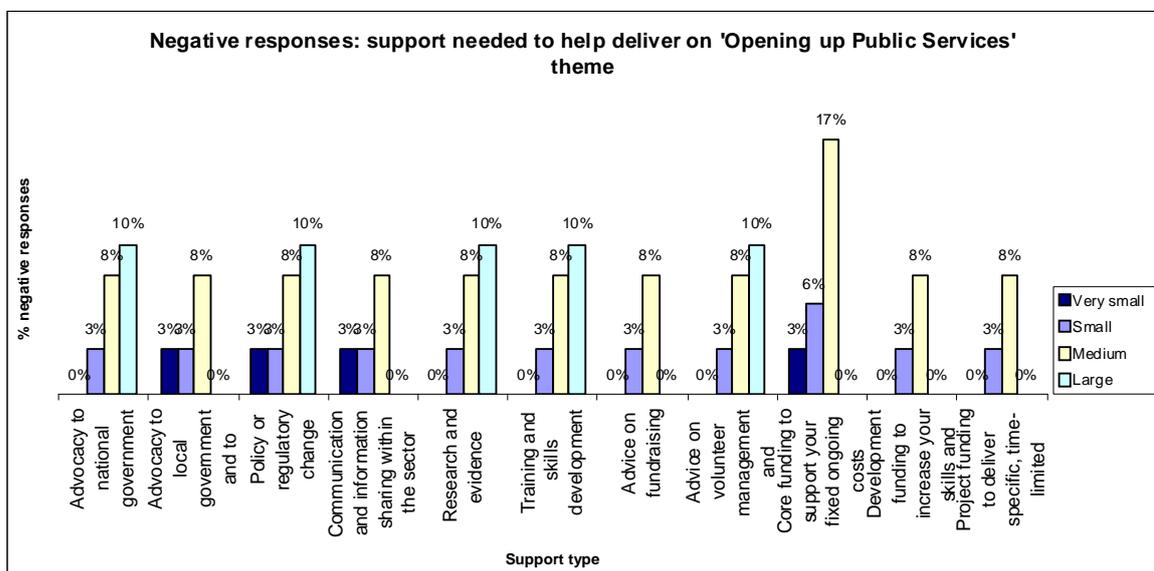
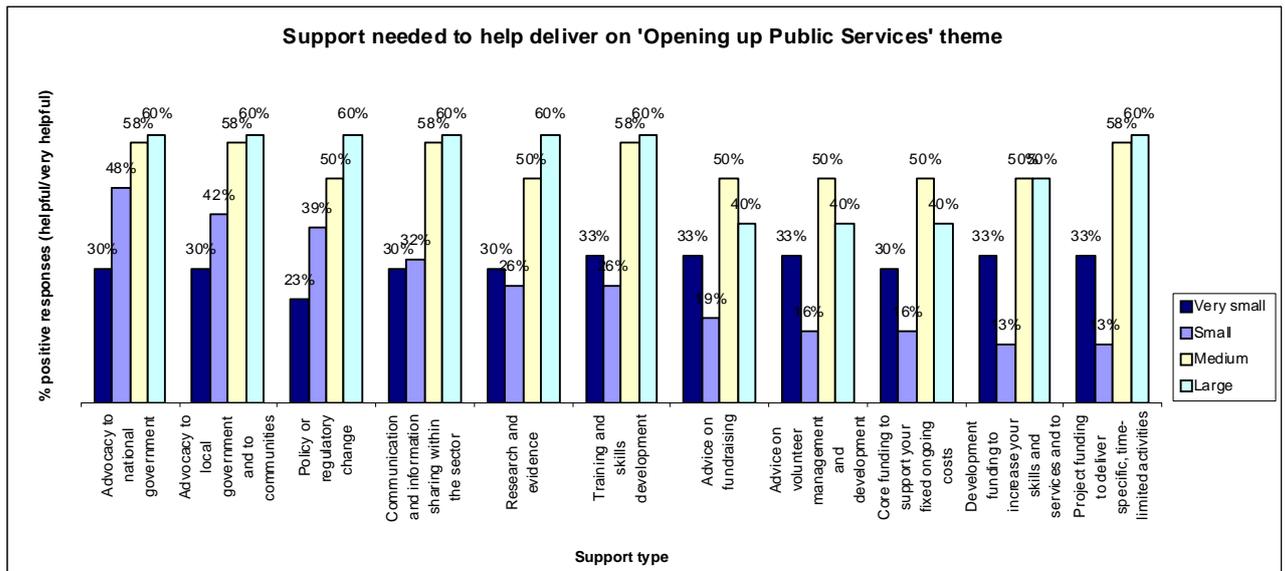
Negative responses are again most likely to have come from small or very small organisations, with very small organisations again most frequently answering that they do not need support for volunteer management or advice on fundraising. Large organisations only rarely reported that they did not need any type of support, most commonly advice on fundraising.



The response trend for 'Opening up Public Services' again follows the overall trend for amount of activity for many support types (small, very small, medium, large in increasing

response order), however medium sized organisations responded more positively to advice on fundraising, volunteer management and development, and to core funding needs. There were few significant trends across each organisational size category, except that advisory support and core funding were less popular than other areas with large organisations, and the same areas plus project funding less popular amongst small organisations.

There is no clear trend for negative responses, perhaps due to the small sample (for instance, all the negative responses for the small organisations were from a single respondent). Very small organisations were most likely to state that they did not need help with volunteer management, advice on fundraising or policy change, while medium sized organisations gave most negative responses to core funding. Overall, the response numbers are small, however, so not of great significance.

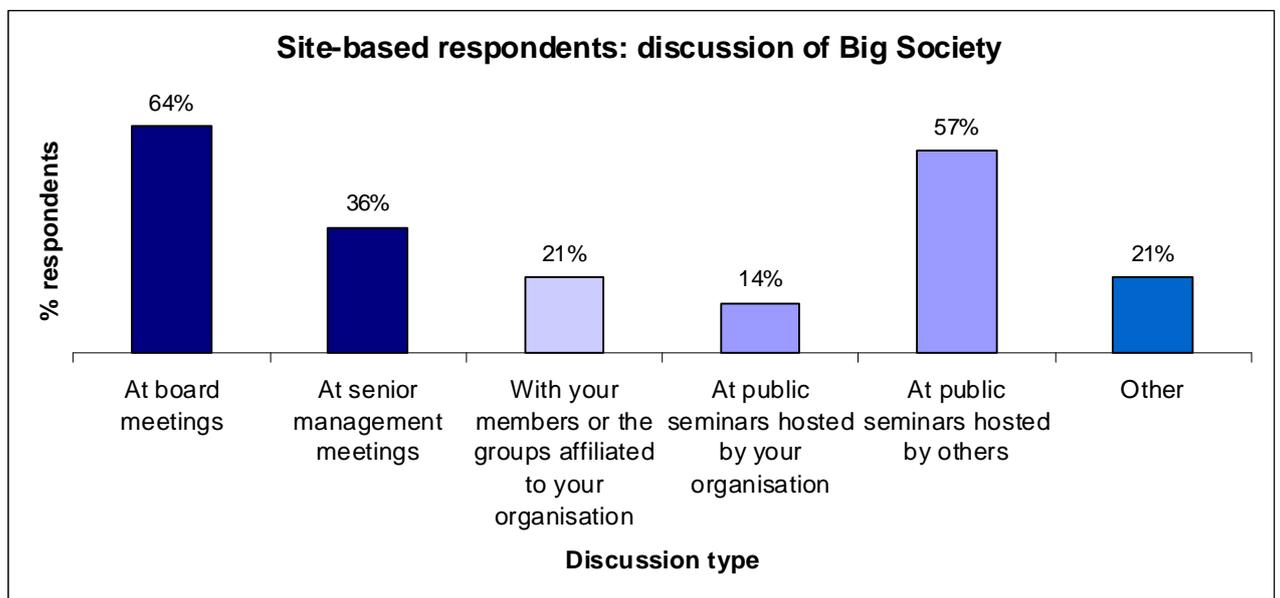
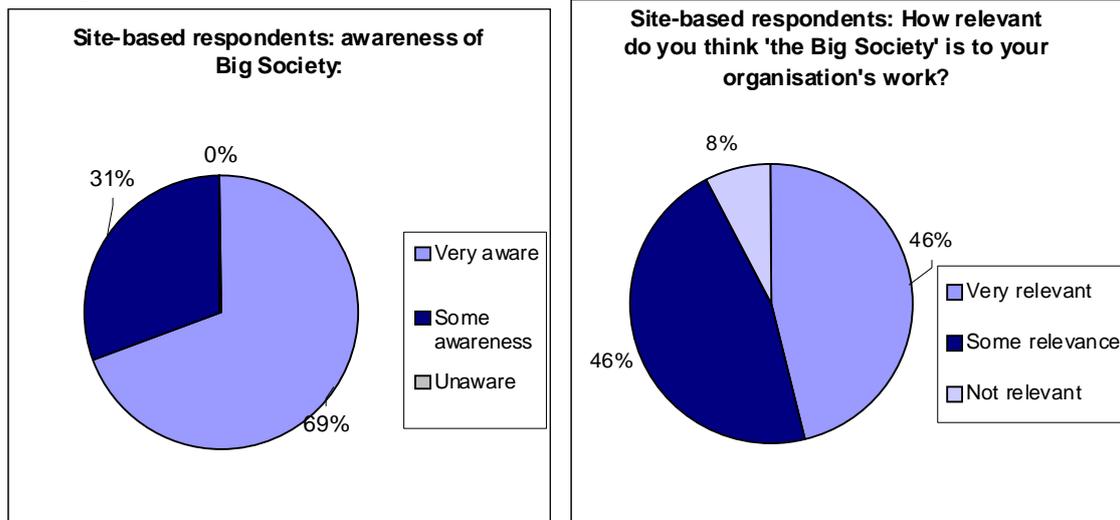


In summary, this analysis revealed that larger organisations are in general currently contributing more work towards all three Big Society themes, and that there was some variation in the types and level of support needed. The most prominent insights are the perceived need for project funding by small organisations, and for advocacy to local government by large ones.

Site-based organisations

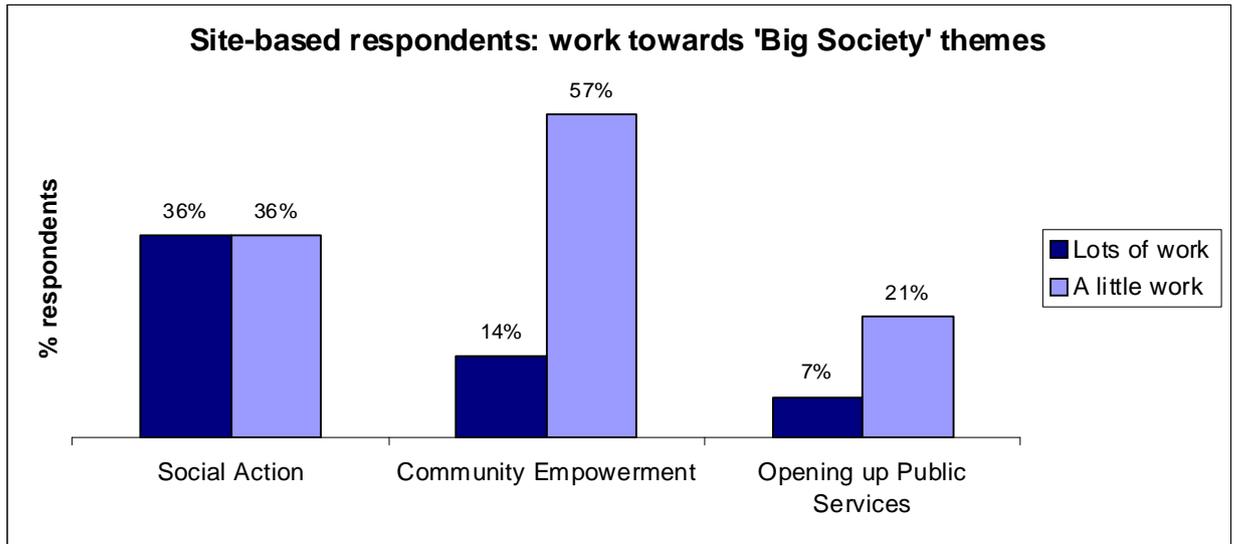
14 of the respondent organisations (11 of which are THA members) can be defined as 'site-based', i.e. they own or manage heritage assets such as buildings, land or museums. The small sample size means that more extensive research would be required to verify the findings, however they are useful for comparison with the overall response set.

These organisations were more likely (69% compared to 59% overall) to say that they are 'very aware' of 'Big Society' initiatives, and none were unaware. The perception of 'Big Society's' relevance to their work was similar to the overall response, with slightly fewer feeling that it is not relevant. They were more likely to have discussed the concept at board meetings and at seminars hosted by others,

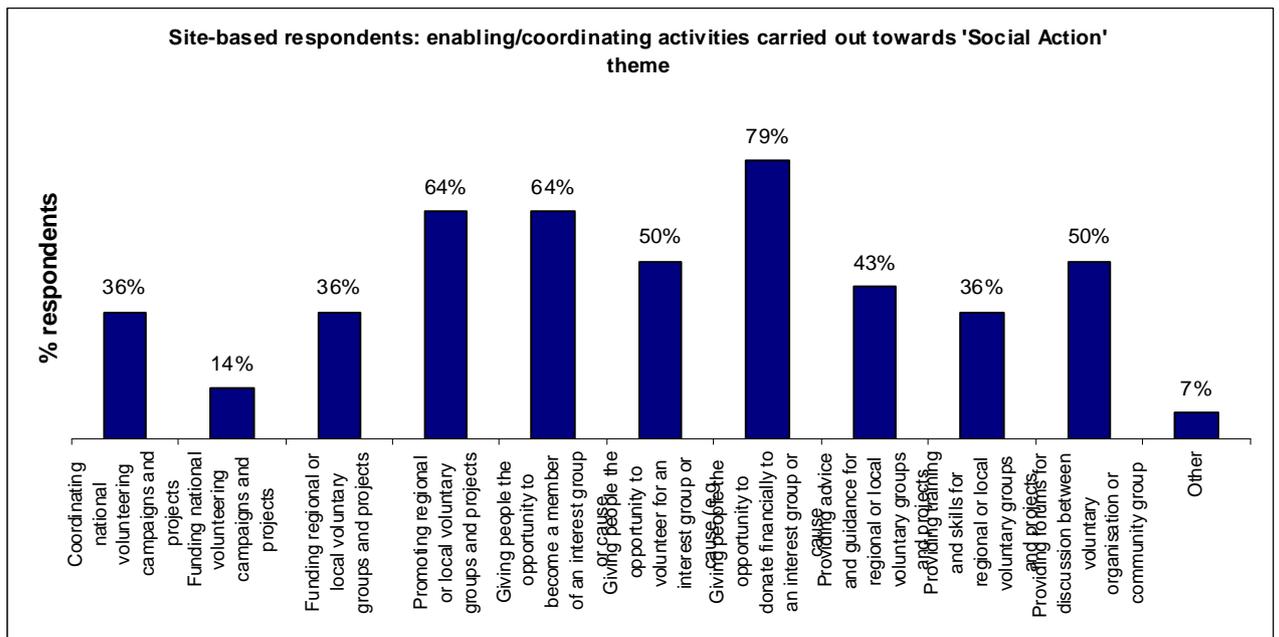


and slightly less likely to have discussed it with members or affiliated groups.

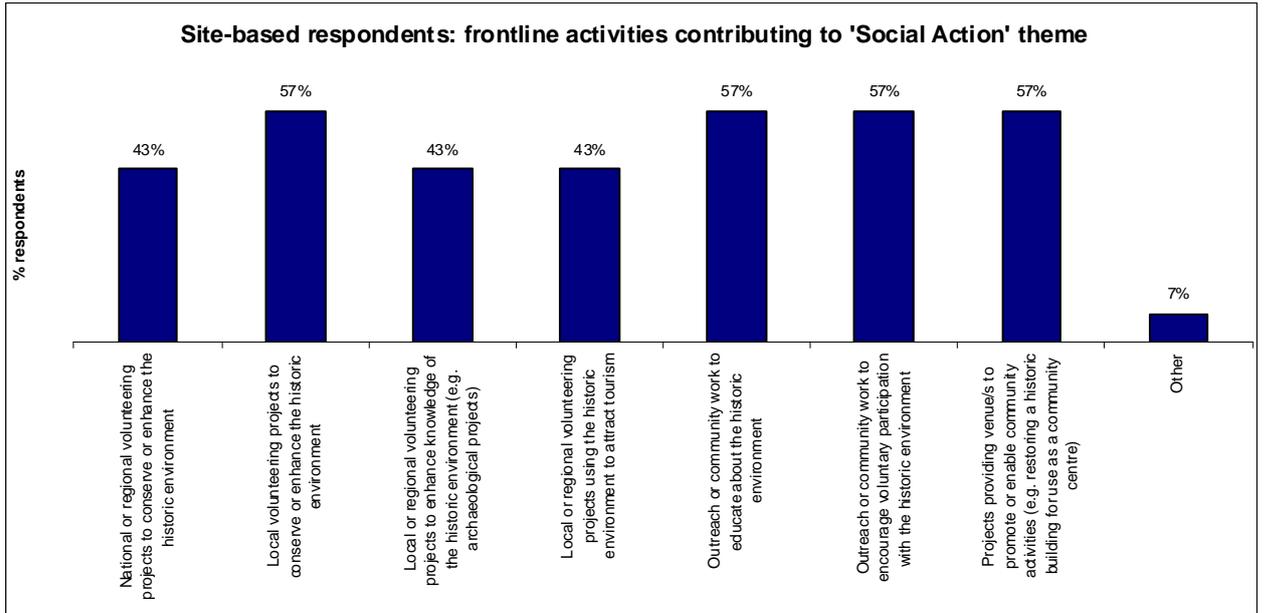
In terms of activity, a slightly lower proportion of these organisations reported work towards the 'Social Action' theme than overall (but with slightly more reporting 'lots of work'), slightly more work was reported towards 'Community Empowerment' (although a lower proportion described 'lots of work'), and less work under the 'Opening up Public Services' theme.



With regards to 'Social Action', the most common area of work was providing the opportunity to donate financially, followed by the opportunity to become a member of an interest group and promotion of local groups. Site-based respondents were more likely to promote regional or local voluntary groups and projects, and to offer the opportunity for financial donation or to volunteer for a cause or group.

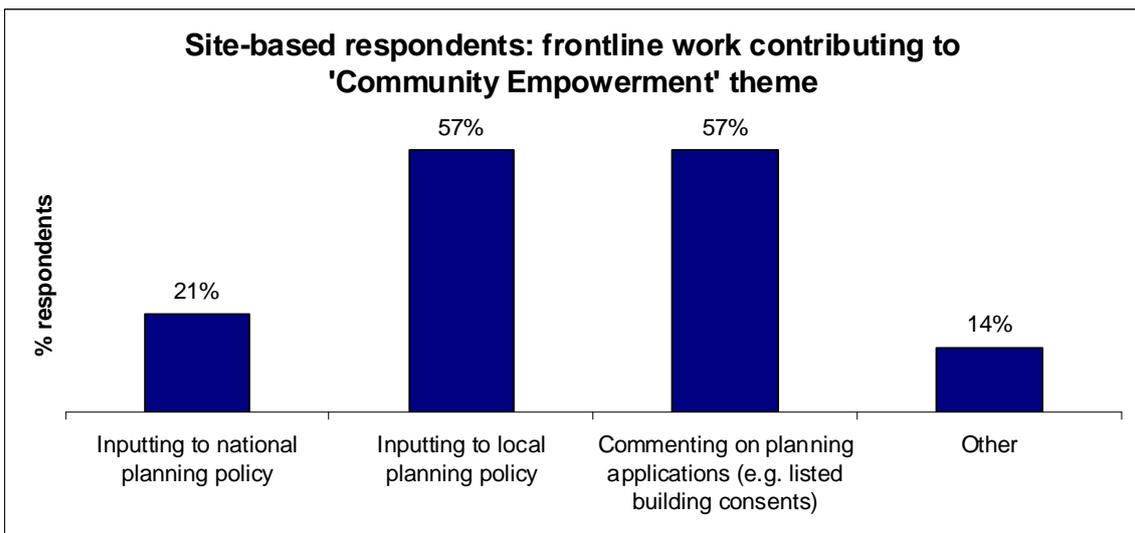
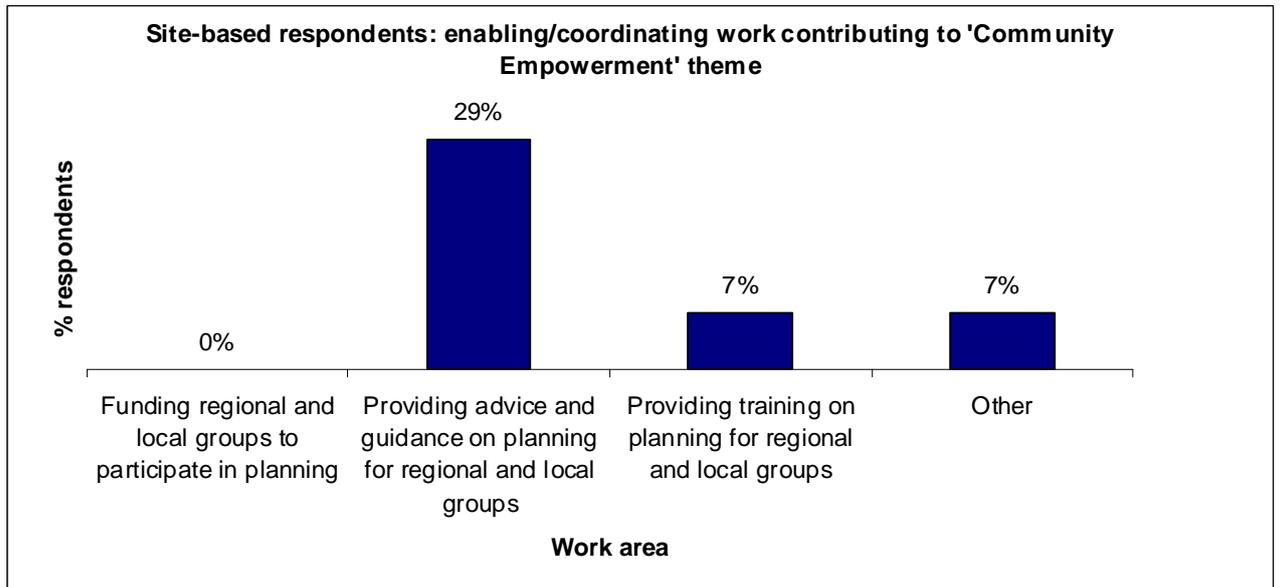


All frontline activities were represented fairly evenly. More work is being done in terms of outreach work and projects providing a venue for community activities, than overall.

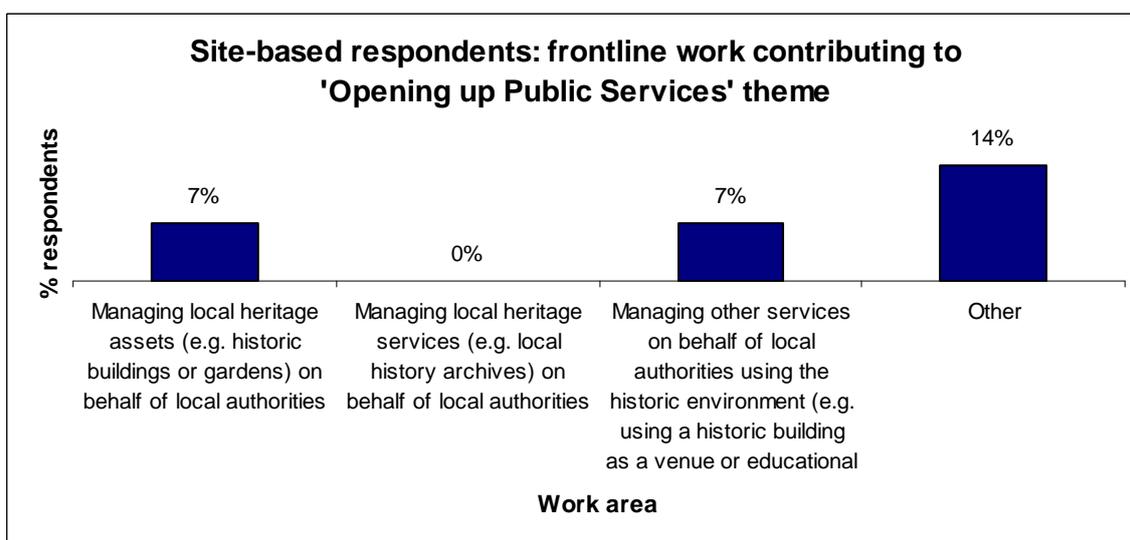
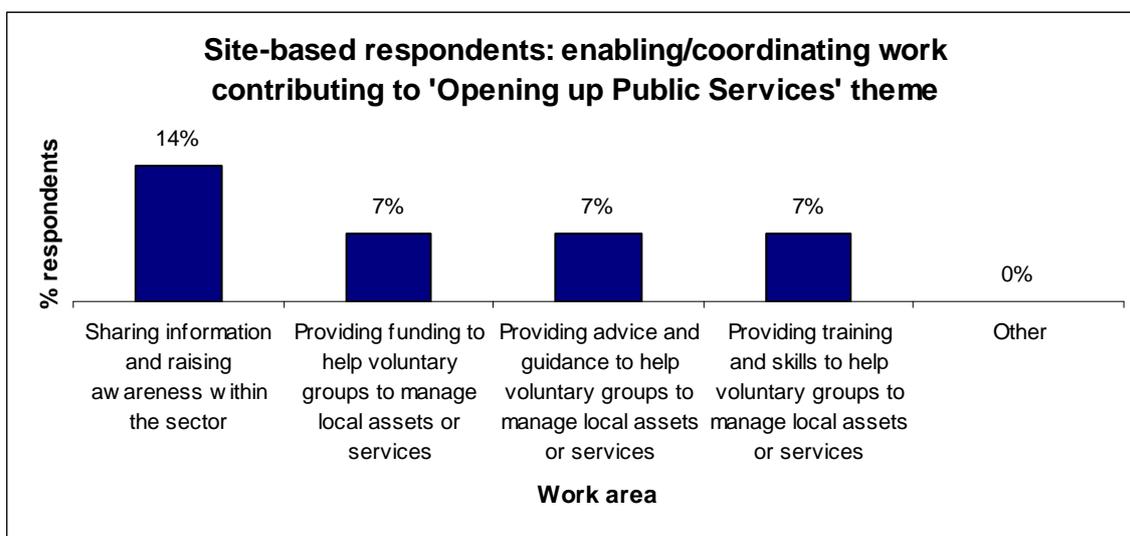


In terms of 'Community Empowerment', site-based organisations were less likely to undertake all suggested enabling/coordinating activities.

However, these organisations were more active in contributing to this theme by inputting to local planning policy, both in terms of local policy and commenting on individual planning applications (57% in both of these areas). They contributed less to national planning policy.

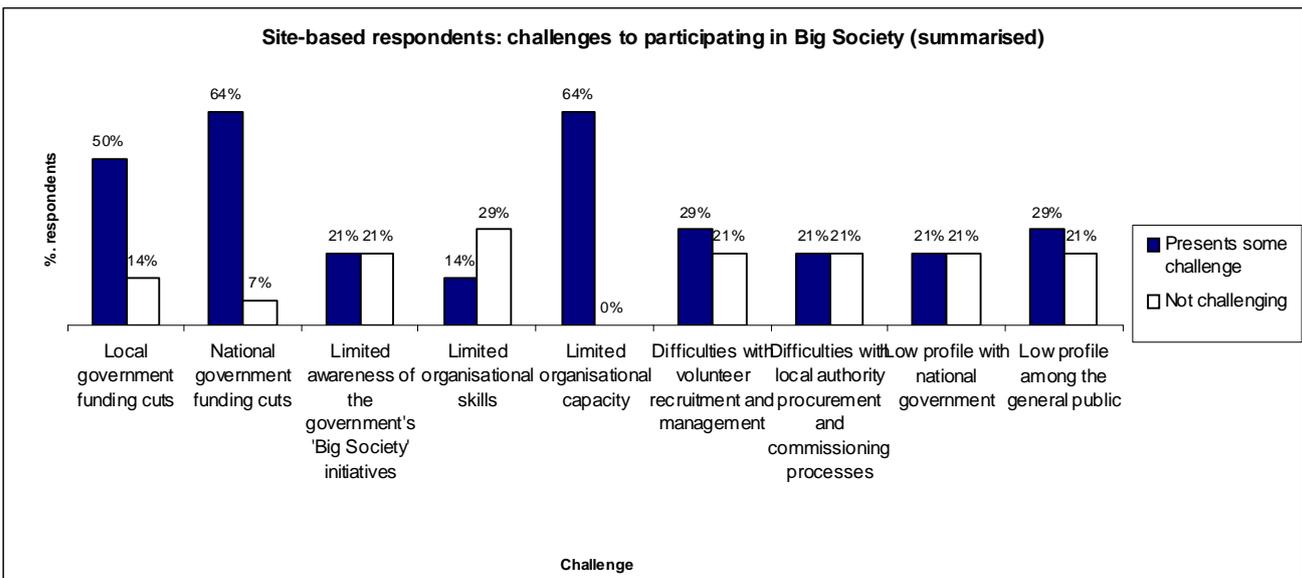
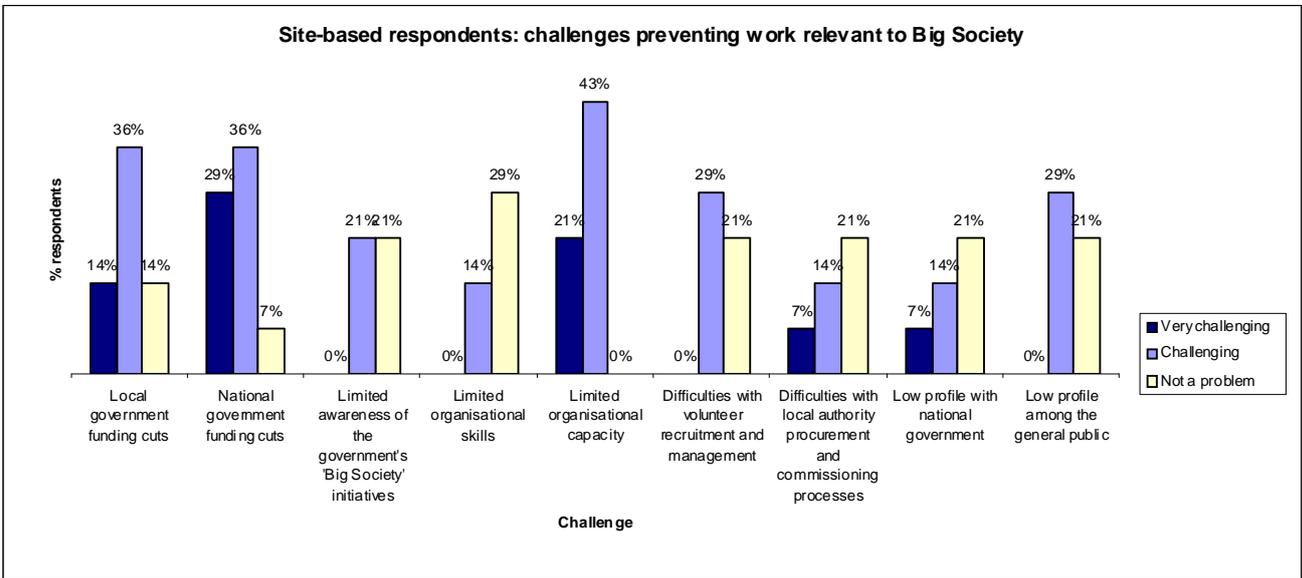
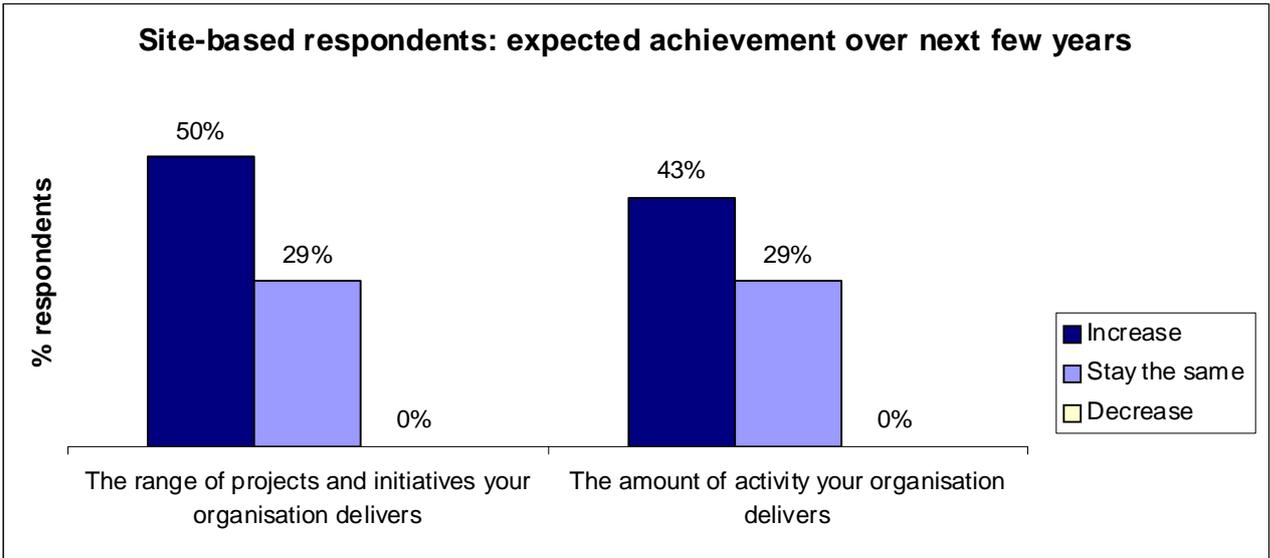


The work reported under 'Opening up Public Services' reflects the lower overall reported



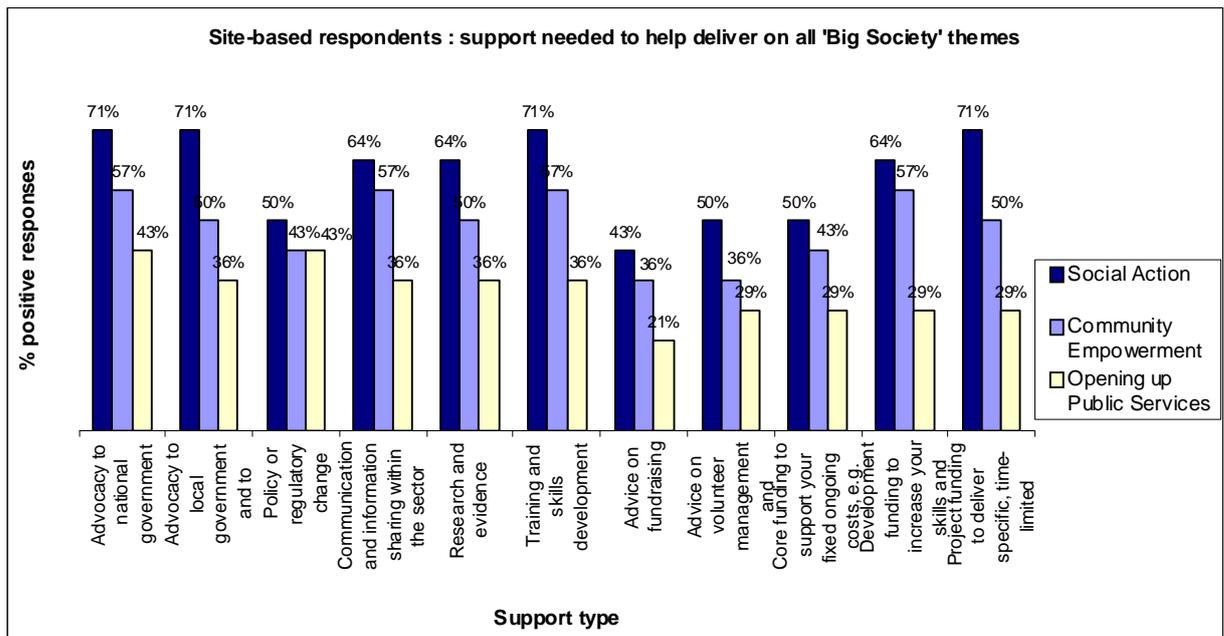
activity under this theme by site-based groups. No more than 2 organisations confirmed that they undertook work in any of the specific suggested areas.

The organisations were optimistic about their work over the next few years, following the overall trend. The areas they find most challenging are limited organisational capacity, and national government funding cuts, which follows the overall trend. These were also felt to be 'very challenging' by the highest number of respondents, along with local government funding cuts. The area most commonly cited as not challenging was limited organisational skills. Site-based organisations were less likely to find a low profile amongst the general public a challenge than did the respondents overall; the other areas largely follow the trend for all respondents. They were also less likely to cite funding cuts as a 'very challenging' issue. Overall, fewer respondents found each area challenging than did respondents overall, with the exception of national government funding cuts.



Advocacy to national government was the most valued support need over all three themes (concurring with the trend across all organisations), followed by training and skills

development (more popular than overall). Advice on fundraising was the least popular area overall, and significantly less popular than across all respondents, although still attracting some positive responses. Advocacy to local government and project funding were also popular areas to help deliver to the 'Social Action' theme (again, following the overall pattern), and communication and information sharing was less popular than overall to help with this theme. Site-based respondents were more likely to report a need for communication and information sharing, development funding and training and skills development with regards to 'Community Empowerment', and advocacy to national government is also popular as overall. The response to support needs for 'Opening up Public Services' is similar to that overall, the only significant contrast being that advocacy to national government, and policy/regulatory change are slightly more valued (43% compared to 34% and 31% positive responses overall), and advice on fundraising less popular.



Overall, site-based organisations are contributing significantly to 'Big Society', particularly with regards to the 'Social Action' and 'Community Empowerment' themes. Their perceived challenges in contributing are similar to the overall perception, as were support needs, with some slight contrasts, including a more positive response to training and skills and a less positive one to fundraising advice.

Summary

The questionnaire responses gave rich insight into the work heritage organisations are already doing, the challenges faced and support needed in contributing to the strength of civil society. Prominent themes and insights included:

Perceptions and achievements

- Heritage organisations have a high level of awareness of 'Big Society', and believe that it is relevant to their work.
- They are contributing significantly in encouraging people to play an active role in society ('Social Action'), particularly through providing the opportunity to volunteer for a group or cause, and to donate financially.
- Many are empowering local communities to shape their environment ('Community Empowerment'), especially by providing advice and guidance on planning, and allowing their members to actively contribute to local planning policy and to planning applications. Site-based organisations are particularly active in this work.
- Fewer, but still a significant number, are managing heritage and other services on behalf of local authorities ('Opening up Public Services'), for the benefit of the public, or enabling local community groups to do so, particularly through the provision of advice and guidance.
- Larger organisations are particularly active in all areas of 'Big Society'.
- Regional and local groups are more active in all frontline work areas, across all themes.

Challenges

- Heritage organisations face many challenges in contributing to civil society. Organisational capacity and funding cuts (both national and local) were emphasised recurrently across all responses, even more emphatically by smaller regional and local groups.
- Many barriers have arisen as a result of cuts, including loss of local authority staff dealing with heritage, reduced resources to valued historic environment schemes, and knock-on effects to the private sector.

Support needs

- All support types were valued, most of all advocacy to both national and local government, and communication and information sharing.
- Regional and local groups, and small organisations valued advice on fundraising and on volunteer management, however this was relatively less popular overall
- Many organisations would welcome greater engagement with local authorities, including greater recognition from both local and national government as valuable assets for their knowledge and skills .
- The highest level of response to any support need was for advocacy to local government from large organisations (over 500 employees/volunteers) to contribute to the 'Social Action' and 'Community Empowerment' themes, for project funding to contribute to 'Community Empowerment' by the same size of organisation, and for communication and information for very small organisations (up to 25 employees/volunteers) to contribute to 'Social Action'.
- The highest level of positive response averaged across all respondents to a support need was for project funding, communications and information and advocacy to national government to help contribute to 'Social Action'.
- The highest level of very positive response (i.e. responses stating that a support need was 'very helpful') over all respondents for a support need was for core funding and advocacy to national government, to contribute to 'Social Action'

- To contribute to the theme under which least work is currently being done ('Opening up Public Services'), no support need stands out significantly for positive responses, and project funding gained the highest number of 'very positive' responses.

The future

- The numerous challenges faced and substantial support needed have not dampened heritage organisations' enthusiasm or optimism - organisations overwhelmingly believe that they will maintain or increase their contribution to the strength of civil society, regional and local groups even more emphatically so.

The Heritage Alliance members' turnover and publications

Research was carried out in January to March 2011 into THA member turnover, and publications.

Resources

75% of THA members' annual turnovers are publicly available; the remainders were estimated based on their annual subscription rates. A minority of members had yet to produce financial records for the 2009-10 fiscal year at the time of undertaking research; in these cases the previous year's data was used.

- 89 Heritage Alliance members produced a combined turnover of **£620m** last year, equivalent to over half of the DCMS budget. This figure, representing the combined resources of heritage organizations ranging from small groups of volunteers to large national charities, points to the important role heritage plays in civic society.
- However, **£405m** of this came from the National Trust alone. This suggests that despite strength in numbers, without the support of exceptional members like the Trust the voluntary heritage sector is poorly resourced for its responsibilities and aspirations.

Publications

A short questionnaire was sent to THA member organisations, requesting information on circulation figures, frequency, content and media of publications, which received a 45% response rate (39 responses). Data for non respondent organisations was obtained from members' websites.

- 75 publications were identified in total, 29 (38%) of which were available only in hard copy, 10 (14%) only digitally, and 36 (48%) via both sources. Many of those who published only hard copies mentioned plans to offer digital versions in future.
- The content includes news of upcoming events, campaigning reports, feature stories on work relevant to the organisations, book reviews, scholarly articles, situations vacant and advertisements for relevant services. It is clear that the content of most of these publications represents the opinions of experts in their respective fields.
- Circulation figures obtained through email responses provides a total readership of c.354,018.
- Note that this represents just under half of THA members, not including the National Trust, which would be expected to have a substantial readership as its membership is in the hundreds of thousands. If the potential for forwarding electronic issues is considered in addition, the total readership must be considerably higher.

It is evident that the heritage sector is also contributing to civil sector via its role in the knowledge economy; this information sharing resource gives the sector even greater potential to stimulate civic engagement and empower readers by increasing their knowledge on the historic environment. Heritage organisations are achieving this and their other contributions with limited resources.

Follow-up interviews

6 questionnaire respondents provided further information on their engagement with civil society, challenges faced, support needs and views on the future of their organisations. These were respondents of the following organisations:

Church of England Cathedrals and Church Buildings Division (THA member)
Historic Houses Association (THA member)
Norwich HEART (THA member)
Princes Regeneration Trust (THA member)
Towton Battlefield Society (local group)
War Memorials Trust (THA member)

Work towards Big Society themes

A particular focus of the interviews was work under the 'Opening up Public Services' theme, as this was where least work was reported, to gain insights into how heritage organisations are currently contributing and could potentially contribute further.

The Princes Regeneration Trust (PRT) have organised conferences and workshops for community group members to network and learn from other community groups, including a recent (February 2011) one on Heritage Assets, which was attended by both private sector groups such as developers, and representatives of community groups and local authorities. The PRT also contribute to Opening up Public Services via the provision of advice to community groups. They offer guidance both via publications (currently on how to write a business plan, and on 'Regeneration through Heritage'), and on an individual basis to help guide groups through the processes involved in taking on and running heritage assets, such as guidance on completing planning applications, and project tools such as option appraisals. Another two publications are also in progress.

A significant area of work by the Church of England Cathedrals and Church Buildings Division (CCB) under both the Opening up Public Services and Community Empowerment themes is the provision of advice and guidance, for regional and local groups on planning, and on managing local assets and services. The types of advice offered range widely, from publications, to direct written and verbal advice on faculty applications (the Church of England's mechanism for regulating change to church buildings).

The Church of England CCB reported that as well as churchyards, the heritage assets they manage on behalf of local authorities include ruins (over 200 are managed in total, and many of these on behalf of local authorities). The management of standing ruins in particular involves close contact with the local authority. They were also one of just a few (4 in total; 1 stated that their members were doing this) respondent organisations who confirmed that they were managing other (as opposed to local heritage) services on behalf of local authorities, using historic assets (as a venue). Examples of this work include the use of historic church buildings for Sure Start and other children's centres, healthcare facilities, and mental health



1. Gatka Martial arts to mark Anglo Sikh Heritage Day at Eastnor Castle (privately owned by Historic Houses Association member). Reproduced courtesy of HHA.

facilities. Some churches (e.g. St. Christopher's, Birmingham) are also used as a venue for interfaith community activities such as young people's discussion groups. The Church of England CCB also reported that they have been approached more frequently in recent times by local authorities with regard to running services in church building venues; they therefore view this as a growth area of their work. They believe that the increased demand stems from cuts to local government resources.

Opening up Public Services is a key facet of the work of Towton Battlefield Society; the management of the battlefield is a challenging but successful process which has involved bringing together the 6 or 7 private landowners of the site to make decisions. 1 of the landowners has become involved to the extent that they have bought the local public house which had previously closed down, the top floor of which is being planned as a display centre. Towton Battlefield Society feel that the site has been better preserved due to its private ownership. The process of bringing together the landowners has also led to a better preservation ethic for the future; previously some of the landowners had sold metal detecting passes for their land to private detectorists, but this has not happened for the last two years.

The project has thus far depended on 'donations and good will', thus also demonstrating the importance of Social Action's value to both the conservation and utilisation of the historic environment and the strength of civil society. The group started as a local history group and expanded their activities over the past 5 years, fuelled by links with such groups as re-enactment societies. They believe that bringing together different areas of interest is the key to preserving and managing sites such as battlefields. In the case of Towton both the historic and natural environment feature as part of the attraction; the group believe that they should 'go hand-in-hand'. Towton Battlefield Society intend to keep the site free for visitors, so that heritage can be enjoyed by all, and to 'get as many people involved as (they) possibly can'.

The Historic Houses Association contribute substantially to the Opening up Public Services theme, particularly in a frontline capacity. Examples of services run from members' privately owned homes include Post Offices, local shops, social housing, and significant areas of green space for public use, in terms of parks and gardens. Community spaces are often provided, such as cricket clubs; there are many instances of benevolent gifts of land to local communities. In some cases, local authorities hold meetings and events at the properties. Many properties also incorporate museums, and artworks are sometimes loaned between properties; HHA quoted Nicolas Penny of the National Gallery's comment, 'historic houses are the art galleries of the regions'. Educational services offered include craft skills apprenticeships, and annual conservation awards.

Challenges

The barriers that respondents were experiencing in contributing to all three themes of 'Big Society' were further examined, for more detailed examination of what could prevent the heritage sector from furthering its contribution.

Norwich HEART provided an example of the barriers which can potentially stand in the way of work towards the Opening up Public Services theme. Plans had been put in place for the organisation to contribute in a major way to the Opening up Public Services theme, by managing Norwich City Council's heritage portfolio. However, spending cuts caused the local authority to rethink the scheme, as it was felt that the rental income from the assets was needed to help with their financial difficulties.

The city council had also proposed that HEART carry out a £20 million regeneration of The Halls, the most complete medieval friary complex in England, which Norwich CC owns. Over four years, HEART developed a business plan and received 134 applications from architectural practices for the project, from which an architect was selected. However, after the council's resources were cut, they decided to put the project on hold. Although HEART were willing to raise the funds, it was felt by the local authority that the project was too much

of a risk to take on in their current financial situation in case they were required to provide funds at any point in future.

The principal challenges that HEART have experienced, and perceive as potential barriers to their contribution to civil society, are related to government funding cuts, as detailed above. However, they feel that these financial restrictions are 'not the end of the world' if people think creatively. In addition, they feel that there should be more active pressure placed on local authorities by central government to divest themselves of assets; this is felt by HEART to be of great potential benefit due to the skills and expertise that heritage organisations can offer. In general, they feel that there should be a greater recognition by government of the work that heritage organisations are already doing towards their 'Big Society' initiatives.

HEART also feel that it would be extremely beneficial to organisations such as themselves if the HLF funded core costs as well as projects.

The War Memorials Trust cited 'low profile' both with government and the public as very challenging issues in their questionnaire response. They further explained the difficulties thus: 'whilst war memorials are hugely important they tend to be very local and, whilst 100,000 across the UK is a lot more than people think, it isn't a massive number... It is also fair to say that interest in this issue peaks in November and is relatively low the rest of the year. Because each memorial is the responsibility of the local community there are no other pressure groups or large organisations in this sector'. Also, due to their organisational size (5 paid employees) they state that they 'have to be realistic about what we can achieve based on our resources'.

The Church of England CCB also identified funding cuts (local and central government) as the most challenging areas, along with limited organisational capacity, as they do not have many employees in relation to their workload, particularly as relates to policy work. This has the effect of reducing their service delivery to all themes of 'Big Society', as projects such as regeneration and reuse schemes fall behind.

Towton Battlefield Society feel that the most significant challenge in continuing their work towards Big Society stems from a combination of local government funding cuts and the lack of a proactive approach from the local authority, who were described as 'very short-sighted' in terms of their failure to see the revenue and other benefits that could be achieved in the long term by supporting the development of the site with facilities such as a visitors centre and a public house. Another ongoing difficulty is the lack of legal protection for battlefields from such activities as metal detecting; this 'makes everyone's job harder' as there is no framework with the police or courts yet.

For the Historic Houses Association, local government funding cuts are viewed as more challenging than national cuts, as they directly affect their members. Of particular concern are cuts to regional growth funding (by 80% compared with what was available under Regional Development Agencies under the previous government). They feel that the private sector are expected to step in to address the deficit, but their members are unable to do so, particularly as they report being forced to cut staffing due to their financial situation. Another significant barrier reported by the HHA in funding terms is the fact that their members, as private landowners, are unable to apply to the HLF except for education and outreach work. They estimate that this excludes two thirds of the country's heritage from HLF assistance.

Support needs

A more detailed insight into the support types most valued by heritage organisations to assist their work towards civil society was gained with respect to all three themes.

The War Memorials Trust (WMT) explained the benefits which could be gained from core funding thus:

'to recruit more staff to enable it to develop its activities further, for example running more proactive training conferences for war memorial custodians, more site visits at pre grant application stage. WMT tends to be consulted when memorials are in a poor condition, getting out and educating people about how to look after them properly and maintain them appropriately would be more beneficial for everyone in the long run.'

They do not feel that development funding would benefit them in the same way, as 'we don't generate any income from our activities and I always assume that development funding requires some payback. I don't believe war memorials are common enough for any custodian to pay for our advice services – few custodians look after any more than say 30 memorials and many just have 1 so it is a significant enough aspect of their role to pay for services (and few are organisations with money to spare).'

The WMT also feel that funding would be key to resolving the challenge (detailed above) of low government and public awareness, also citing in-kind support as a valuable alternative: 'WMT has recently been more active in contacting MPs and Lords etc. and this has seen results but more could be done. The key support would probably be more funding to enable us to do this or in kind/pro bono PR support that gave us the extra resources to do more in this field. At present we are busy enough just doing our jobs and struggle to get the message out to the widest audiences'.

The Prince's Regeneration Trust, while stating that all suggested support needs are valuable, also regard core funding as the most important area. Their representative illustrated the benefit that funding for core roles can bring in terms of their own role at the organisation, which is a government-funded secondment.

Towton Battlefield Society, a small group with no external funding, explained that any form of funding would be beneficial to future activities and development.

The Historic Houses Association highlighted different support needs, with regards to their members (private historic home owners). To contribute to the 'Social Action' theme, it was felt that these individuals would benefit from more information sharing in the heritage sector, particularly with other home owners, English Heritage and the National Trust. Advice on volunteer management as well as recruitment were also cited as being of potential benefit. In contrast with the overall picture revealed by questionnaire respondents about volunteer numbers, the HHA believe that their members are not engaging with volunteers to the extent that they could if better enabled to, and that a greater understanding of volunteer management could be beneficial. Advice on fundraising would also be of value, again because these resources were not being fully exploited. Advice and guidance would especially be welcomed on the opportunities offered by Local Enterprise Partnerships.

Different support areas again were identified by the HHA as most helpful under the 'Community Empowerment' theme, namely advocacy (to both local and national government) and policy or regulatory change. Specifically, the organisation expressed their need for a stronger regional advocacy; their regional infrastructure is currently weak, consisting entirely of volunteer HHA members, with no coordinating employees in the regions. They recognise, however, that regional advocacy would be difficult to implement. In general, the HHA feel that the profile of heritage should be raised as a very powerful regeneration tool, particularly in partnership with tourism, of great value for planning and employment purposes. In terms of policy and regulation, an issue of particular magnitude is licensing laws, which in the HHA's opinion require a 'lighter touch' as regards historic buildings so that owners and managers of historic assets, like their members, can compete better to hold events, such as those for local communities. The same support needs were cited by the HHA with regards to Opening up Public Services, and specifically, advice on how to contribute to this theme, particularly on public-private partnerships.

The future

The overwhelming optimism of questionnaire respondents with respect to both the range and amount of activities they would carry out in the next few years was of particular note. The interviews gave the opportunity to further explore the reasons behind this optimism.

Norwich HEART are expecting to expand their activities due to many new projects planned for the future, for instance one funded by Interreg, and feel positive about their significance and role in the heritage sector; 'we fill a heritage delivery gap'. They feel that if HEART was franchised across the UK, a great amount of work could be done.

The PRT attribute their optimism about the future to an increased recognition of their work: 'as we deliver more projects, we are becoming more widely known', and also to the financial challenges currently facing local authorities – they are receiving more enquiries from this source. The numbers of volunteers and interns recruited are also increasing, possibly due to the shrinking of the paid employment market.

The Church of England CCB also believe that both their range and amount of activity will increase, as there is increasing demand for work in this area (such as from local authorities to manage assets and services). The organisation are also shifting their focus away from individual projects and towards wider strategies, which are taking into account work towards Big Society. They are also building stronger relationships with various government departments, which is likely to encourage and assist work towards the government's initiatives.

Towton Battlefield Society foresee an expansion in their work due to continually increasing public interest in heritage (which they attribute to such sources as television programmes) and interest focused specifically on Towton, which is described as having snowballed. This awareness has been fuelled by much recent publicity (including features on radio and written sources, e.g. Radio 4 and *Country Life*), partly the result of Towton's role as the first organisation to launch English Heritage's Heritage Crime Initiative. The project has even raised international interest, for instance a group from Harvard University (USA) are planning to visit. Activities and projects have been planned; the Society are now part of the Yorkshire Tourist Board, 30 school trips a year are planned.

The Historic Houses Association's optimism about their activities over the next few years is attributed to their members becoming much more active and interested in getting involved in initiatives related to the 'Big Society'. Since they are managing their own properties, the HHA emphasises that they will not let them fail, and that their members' efforts owe a great deal to a 'huge pride of place' in their regions and areas, many being extremely keen to involve and interest people.

The expectation of the interviewees that their organisations would increase the amount and scope of their activities stems from a wide range of reasons specific to their organisations. Two recurrent themes are increased awareness of their activities and of heritage in general, and more frequent enquiries from local authorities which could potentially lead to more work under the Opening up Public Services scheme.

Summary

A number of recurrent themes and more detailed insights emerged from the interviews, as below.

Work already carried out towards 'Big Society' themes and benefits gained:

- Advisory work is a means through which organisations contribute to all three themes, and is being offered in a range of different media, from publications to tailored advice provided on an individual basis.
- The Historic Houses Association and Towton Battlefield Society gave insights into working with the private sector and the benefits which can be gained by such relationships.
- Local communities and the public in general are the beneficiaries of many services and facilities due to the work of heritage organisations, including heritage sites open and free for all, green space and community spaces including public houses and cricket grounds.
- The historic environment has both benefitted from conservation and continued use or reuse, and is being exploited in a more beneficial way as a result of the work.

Challenges faced:

- The engagement of local authorities with heritage organisations is an issue highlighted by both Norwich HEART and Towton Battlefield Society.
- An interesting insight gained was the plural and contrasting impact of tighter local government finances on 'Opening up Public Services'; these have created a barrier to Norwich HEART's work towards 'Big Society' but are likely to increase that of the Church of England Cathedrals and Church Buildings Division.

Support needs:

- The importance of core funding was further emphasised, its value explained in terms of enabling work to be done in addition to regular tasks, or existing tasks to be carried out more thoroughly and effectively. An alternative, or additional form of support is donation in kind, for example government-funded secondments.
- Additional support needs cited were information sharing and advocacy

The future:

- Positivity about the future was attributed to a number of different organisationally-specific reasons

However, a theme running throughout the responses was an increase in interest and recognition of the value of both heritage and heritage organisations, by the public, local government and organisation members.

Case Studies

Overview

From a multitude of examples of projects and activities illustrating heritage organisations' active contributions to civil society, revealed by research and questionnaire respondents, 6 case studies were researched in detail, via online information and interviews with representatives.

In particular follow up looked at the 'unexpected' illustrating innovative partnerships and sources of funding and also how heritage project can take advantage of wider government initiatives such as the v volunteering programme.

While these can by no means be said to be an exhaustive survey of THA member activities, it is worth noting the type of activities covered, in terms of the Big Society 'themes'. Of the full list of case studies (95), the vast majority (89) demonstrated work under the 'Social Action' theme, perhaps unsurprising considering the number of volunteers engaged with organisations and the questionnaire results. The majority of these also involved work that could be defined as 'Opening up Public Services'. Only 7 of the case studies could be defined as contributing to the 'Community Empowerment' theme (5 of which also related to Social Action). As the questionnaire responses indicated that more work is being done towards the latter theme, perhaps the paucity of projects under the 'Community Empowerment' theme indicates that work in this area is ongoing and not widely publicised, or occasional, rather than project based.

The case studies detailed in this section are:

Waterways Action Squad (Waterways Trust)
CSI Sittingbourne
Colchester Roman Circus
Lincolnshire Heritage At Risk
Birmingham Heartlands Canal Ring
SAVE Britain's Heritage: Pathfinder campaign



2-3. Waterways Action Squad (courtesy of Waterways Action Squad)

Waterways Action Squad

Organisation	Waterways Trust
Location	North East England
Duration	June 2009-June 2011 (1 st and 2 nd stages; looking to continue and expand after June 2011)

The 'Waterways Action Squad' programme was initially launched in June 2009, through the environmental strand of V (The National Young Volunteer Service)'s match funding scheme, which pairs corporate partners with voluntary organisations, and in this instance paired the Bank of America with the Waterways Trust. The Bank of America is 'supporting the Waterways Action Squad as part of its global investment in organisations and initiatives that (are involved with) environmental issues' (WAS website: About Us). 'V' and the Bank of America provide the funding for the project (50% each), while British Waterways and the Waterways Trust are the delivery partners. In addition, local and regional partnerships have been formed with a large number of organisations, such as Lancashire Wildlife Trust and the National Community Boats Association (NCBA) (Briefing Note for V January 2011).

The project was conceived bearing in mind that young people were 'massively under represented' in volunteering in the area (Lucie Unsworth, WAS project manager), an issue that the Waterways Trust and British Waterways were aware of. Lucie Unsworth believes that although young volunteering in the area may have increased over time, it would have been 'a much slower process without the aid of this funding', and feels that youth engagement is now 'embedded' with the assistance of the project.

Before the project began, two parallel consultations were carried out, one with existing staff and volunteers in the area, and the other with young people across the North West consisting of 'surveys, focus groups, meetings and a large piece of market research carried out by young volunteers from West Cheshire College's Marketing Department' (ibid.); these provide information on the situation before and without the project. Perceptions of young people within voluntary organisations at the start of the project were often negative; they did not feel that their organisations would be significantly benefitted from their involvement. However, these views have now changed, and in fact many of the same organisations are now requesting the assistance of the young volunteers, having seen the standard of work being carried out! (ibid.).



4-5. Waterways Action Squad: traditional hedgerow laying (Courtesy of Waterways Action Squad)

The project's aims at its outset were (from Briefing Note for V January 2011):

- To develop the capacity of British Waterways and The Waterways Trust to increase youth involvement in waterways
- To improve young people's attitudes towards waterways
- To make the waterway environment better for wildlife and more attractive and welcoming for people

The project has engaged with 700 volunteers (DEFRA 2011). The young people involved have acquired many new skills and benefits. These have included, to date, traditional crafts skills including re-laying hedgerows using traditional techniques and dry stone walling. Some volunteers have had the opportunity to get involved with the Horseboating Society to crew a traditional horse-drawn barge.

In addition, broader transferable skills have also been provided; office-based volunteers have gained IT skills, and some have earned NVQ IT or Business qualifications as part of their work, while some projects involve work with children. Some volunteers act as 'Waterways Ambassadors' in roles alongside the project team to help with project development work such as media, administration, public relations, marketing, recruitment, event planning and financial operations. The Ambassadors also gain leadership-level experience with clear progression routes. Formal awards and accreditation are available for the volunteers from 'V' for their participation. Training and ongoing support is also available for staff at the organisations involved with volunteers.



6-7. Waterways Action Squad: Drystone walling (Courtesy of Waterways Action Squad)

The historic environment has also benefitted, from the regeneration work carried out via the traditional craft activities. British Waterways Heritage advisers have been closely involved with the project. An activity currently in the planning stages is learning about and using lime mortar in the conservation of the Rochdale Canal.

In addition, local waterway areas have experienced environmental improvements such as visual art and cleaning up litter. Local communities have shown interest in events including a boat race and the launch party. The young volunteers have also mentioned that they feel more involved with their communities (L. Unsworth).

The beneficial experiences and skills learnt by volunteers are evidenced substantially at present by comments posted on the website by volunteers (Waterways Action Squad website: Have Your Say). Monitoring and evaluation have been built in from the outset, with interviews with young people prior to the start of the project assessing their perceptions of waterways, regular reviews and exit interviews with volunteers.

The only major challenge faced by the project was resources in terms of personnel – the project team consists of three individuals, so the project's scope necessarily had to be compact, focusing on Liverpool and Chester for its first phase, and Manchester for the second. Ideally, the project manager feels that more could have been achieved were more

resources available, and perhaps the project would have made more partnerships with local volunteering groups.

The project has always been viewed as a model and pilot for a wider project, and Waterways Action Squad are currently applying for further funding to continue the project and extend activities outside the North West (the current funding ends in June 2011), working with British Waterways and other key partners (L. Unsworth and Briefing Note to 'V' 2011). Birmingham and London are possible future target areas.

The project demonstrates extensive work by the Waterways Trust towards the 'Social Action' theme, providing an opportunity for structured voluntary work which benefits both the historic environment and the individuals involved, and strengthening community cohesion. In addition, the benefits of corporate philanthropy are evidenced by the involvement of the Bank of America.

CSI Sittingbourne

Location	Sittingbourne, Kent
Duration	September 2009 - ongoing

The CSI (*Conservation Science Investigation or Community Sustainability Issues*) Sittingbourne project was conceived and founded in September 2009 by locally-based freelance conservator Dana Goodburn-Brown, who partnered with Sittingbourne Heritage Museum (SHM) and Canterbury Archaeological Trust (CAT).

The project has enabled volunteers, trained and supervised by professional archaeological conservators, to conserve some of the 2500 archaeological objects recovered from 229 graves of a local Anglo-Saxon cemetery site (CSI Sittingbourne website). The site, known locally as The Meads, was discovered and excavated in late 2008 by Canterbury Archaeological Trust before development of the site. Much of the earth had been removed as the area had been a brickfields, therefore many of the graves were very shallow, and some objects damaged (ibid.).

With funding available from a developer at the site, Dana Goodburn-Brown would have been able to conserve and examine in detail 'a handful' of objects, and all would have been recorded on X-ray, but without the time devoted by the 30 trained volunteers, it would not have been possible to examine the same level of micro-evidence (D. Goodburn-Brown). The objects would also likely have suffered further degradation as the conservation process would have inevitably been significantly slower. Goodburn-Brown's initial idea was an initiative similar to those at various national museums (e.g. the British Museum), where a conservation laboratory is open to the public to view and speak to the conservator. However, she estimated that this would have required two to three times the amount of funding due to the time taken to both conserve the objects and meet the public.

The project's aims are to 'conserve the artefacts, but to also involve the community and raise the interest of their important and often forgotten history', and to 'promote the conservation profession' (CSI website). In January 2011, CSI partnered with V.inspired (a youth volunteering organisation), who are recruiting additional young volunteers.

Using its current resources the project can stay open until late May 2011; it is hoped that current fundraising activities will be successful so that it can continue. One of the developers (Marston's Inns and Taverns) at The Meads has provided funding for the project, however the other has not. Kent County Council has also contributed. The premises for both the laboratory and the exhibition are based in a central shopping centre, and provided rent-free by Tesco, while the council has exempted them from tax. Equipment has been donated to the project by numerous individuals and organisations, including microscopes from University College London (the others are from Goodburn-Brown's private business), an X-ray machine from Rapiscan (part of their corporate responsibility agenda) and a fume cupboard donated by a volunteer.



8-9. CSI Sittingbourne: shopping mall-based laboratory; volunteers busy examining objects

CSI Sittingbourne has provided a rare (possibly unique) opportunity for untrained volunteers to gain skills in archaeological conservation, which would only normally be taught in university level courses. At least one of the volunteers has now gone on to a university course, having been inspired by their work on the project. No more than four volunteers work in the laboratory at one time, and one or two professional conservators are always available to offer advice and training; this results in high quality training for the volunteers and minimal risk to the objects. Volunteers come from a range of different professions and backgrounds/ages, including young people, graduates, retired people and professionals such as etymologists and metallurgists. Most are locally based, although a few come from further afield (Tunbridge Wells and London). Thus far, 215 objects have been conserved, from 30 graves (CSI website). 50 volunteers were trained initially, of which 31 have continued with the conservation work.

The young people involved via 'V' can also gain certificates for their volunteering, potentially enhancing employment prospects.

Although the project has raised concerns by some professional conservators that trained professionals are effectively being replaced by volunteers, Goodburn-Brown believes that if adopted as a model for other schemes, more job opportunities would be created in archaeological conservation, in public engagement.

The volunteer experience has been highly positive; Sylvia Smith, a part-time office worker, felt that the experience was 'a privilege to... hold objects that have been in the ground for hundreds of years' and 'very therapeutic', and reported the 'unique' experience, skills learnt and friends made as highlights. Volunteer Patricia Horne believes that 'everybody should have (this) opportunity'.

The local community has further benefitted from an archaeological exhibition set up exhibiting some of the finds, with free admission to the public. The shopping mall location has attracted many casual visitors who do not usually visit museums; some come to the laboratory regularly to follow objects' progress (D. Goodburn-Brown). To date, the exhibition has attracted over 14,500 visitors (Paul David, volunteer at exhibition).



10-11. CSI Sittingbourne: Informative display in laboratory (I); educational materials in archaeological museum

A further 32 graves, containing 89 objects, remain to be conserved; if the project receives funding, it will be possible to continue work on these.

If fundraising is successful, it is hoped that the project can be used as a model for a wider scheme, for example 'CSI Kent'. It is also hoped that volunteers will be able to get involved with Canterbury Archaeological Trust on site.

The project's achievements and experiences have been shared via a presentation ('CSI: Sittingbourne – The Value of Volunteers') was made at the Conservation in Wales Matters conference in December 2010 to raise awareness and share the project's achievements. CSI Sittingbourne has also featured in the local and national news, including Current Archaeology magazine and the Guardian.

CSI Sittingbourne is an inspiring example of an independently and locally conceived and founded project which has utilised 'Social Action' in terms of philanthropy, local voluntary work to conserve historic assets in an innovative and effective way. The laboratory and museum also provide a voluntarily run educational resource, thus contributing to 'Opening up Public Services'. The project is particularly notable for its role in raising awareness and inspiring the local community to take an interest and to get involved with heritage in their local area.



12. CSI Sittingbourne: free archaeological exhibition displaying objects excavated and conserved. Based in shopping mall opposite laboratory

Colchester Roman Circus

Delivery organisations	Colchester Archaeological Trust and Destination Colchester
Location	Colchester, Essex
Duration	Ongoing since October 2009

In 2004, Colchester Archaeological Trust (CAT) carried out archaeological investigations for the developer Taylor Wimpey as part of the works for the redevelopment of Colchester Garrison, and discovered the remains of a 2nd Century Roman Circus, the only one known in Britain. Taylor Wimpey changed their plans to leave the remains undisturbed (CAT website). They proposed to open the site for fee-paying public access (Colchester Roman Circus website). A fundraising scheme project was put into action by CAT and Destination Colchester (a local voluntary organisation) to raise £200,000 to buy the former Sergeants' Mess (itself a listed Victorian building) and site of the starting gates of the Roman Circus site, to prevent it being privately owned and developed and to set up an interpretation centre for the public and allow free access. In September 2009 Taylor Wimpey offered the partnership six months to buy the Sergeants' Mess building. The initial plan was to find private buyers to purchase one half of the building, and to use the other half as a visitor centre for the circus (Friends of CAT website)

The project's aim is 'to create a free public facility with informative displays, a cafe, and a well laid-out and attractive garden featuring the remains of the eight starting gates of the circus. We want to create a quiet and pleasant space in which Colcestrians and visitors alike can relax and explore a unique aspect of Colchester's Roman past' (Save Colchester's Roman Circus website). It is intended to expose under cover the central part of the Roman Circus' gates and mark the positions of the rest of the gates. An interpretation centre would be set up, also housing a tearoom, the profits from which it is hoped would allow the centre to be free to visit.

The fundraising scheme was highly imaginative, including the organisation of a multitude of innovative events in the local area, such as a Roman feast, treasure trails for children and cinema screenings (Ben Hur, courtesy of the local Odeon cinema). A number of local businesses and individuals donated, for instance a local antique shop, a printers and football fans at a Colchester United match (Colchester Roman Circus website: News February 2010), and schools raised money via non-uniform days for pupils. Online fundraising (via Facebook and Twitter) was a key medium. The Friends of CAT donated £30,000 in total. In the final stage of the project the local council pledged the final £30,000 if the group raised £170,000, which they did.



13. Colchester Roman Circus: Football fans at Colchester Utd v Oldham donated over £1000 (February 2010, image © Howard Lake)

Bill Hayton (Chairman, Destination Colchester) believes that the fundraising's success lay in its focus on 'telling a story rooted in local heritage', and emphasising that it aimed to 'save *our* heritage' and promoted the multiple layers of heritage involved (the 19th century army garrison, the Roman Circus and the archaeological remains excavated from other periods), which attracted a wide range of people.

The total raised was around £242,000 including pledges, from 1001 donations (Colchester Archaeological Trust website).

A major challenge for the project was in October 2010, when one of the two buyers for the Sergeants' Mess dropped out, leaving a £200,000 shortfall in the funding package. In December 2010 the decision was made, and put to all donors who could be traced, to apply to purchase the former Army Education Centre building rather than the Sergeants' Mess for use as an education centre for the site, although the funds had been raised to buy the latter. This was due to the perceived risk of taking on such a large building (B. Hayton). Ownership of the garden, and therefore the means to create a free interpretation centre, would still be gained, on a 125 year lease held by Colchester Borough Council. In January 2011 the Charity Bank approved CAT's application for a mortgage for the remaining £168,000 to buy the former Army Education Centre (Colchester Archaeologist website). Destination Colchester are still pushing to raise funds to also buy the former Sergeants' Mess building, and are working on an application for an HLF grant for this purpose.. The local Liberal Democrat group have purchased land around the circus 'where possible' to save the circus for the future' (Lyn Barton, the council's portfolio holder for planning, regeneration and sustainability, via Colchester Archaeological Trust website {archived}).

The project has frequently featured in the local news, and a member of the project team (Howard Lake) has given a presentation about the project's successful fundraising tactics (particularly online), along with other presentations to visiting groups such as a group of planners.

The fundraising for the Colchester Roman Circus interpretation project illustrates the utilisation of extensive and highly successful work under the 'Social Action' theme – philanthropy from many different sources, and dedicated volunteering efforts – as part of a scheme which aspires to run a heritage resource open to all. Thus the end result if the project achieves its aims will demonstrate beneficial work towards the Opening up Public Services theme.



14. Colchester Roman Circus: fundraising merchandise (image courtesy of Destination Colchester)



15. Colchester Roman Circus: supporters (image © Howard Lake)

Lincolnshire Heritage At Risk

Delivery organisation	Heritage Trust of Lincolnshire
Location	Lincolnshire
Duration	Piloted Spring 2009 – Spring 2010, next phase April 2010 - April 2013

The Lincolnshire Heritage at Risk Project was set up to assess over 8,000 heritage assets in the county. The project was conceived by English Heritage and the Heritage Trust of Lincolnshire took the lead in the project delivery. The Trust has partnered with many other organisations on the project, including the Heritage Lottery Fund, a number of local councils (Lincolnshire County Council, Boston Borough Council, East Lindsey District Council, Lincoln City Council, North Kesteven District Council, South Holland District Council, South Kesteven District Council and West Lindsey District Council) the Community Volunteers Service in Lincolnshire, Lincolnshire Wolds Countryside Service and the Diocese of Lincoln, all of whom expressed their interest in being involved after being contacted by the Trust (Matthew Godfrey, Senior Project Officer). The partners sit on a quarterly steering group, the local authorities predominantly represented by conservation officers.

The project set out 'to develop a county wide strategy to better manage heritage at risk and seek further investment in Lincolnshire's historic environment'. Its stated aims are to involve local communities, recruit and train a network of volunteer 'heritage stewards' and provide them with support, feedback and development opportunities, record historic buildings and sites, raise awareness of Lincolnshire's heritage and provide information on its condition, to build capacity to maintain the information for the future, to work in partnership with local authorities and others, and to develop an HAR management strategy (project leaflet). The pilot project was run from April 2009 until April 2010, and the final project will run from April 2011 to April 2011.

The volunteer 'Heritage Stewards' learn numerous skills; the initial training (open and free for all with no obligation to volunteer) sessions teach skills in surveying historic buildings in various towns around the county (e.g. Alford – upcoming event in May 2011), including practical sessions (Lincs HAR website: Training events). 'Help notes' are also available online for specific asset types, e.g. parks and gardens (Lincs HAR website: Survey help). The Heritage Stewards carry out condition surveys of heritage assets in their local area, and log results onto the Lincs HAR database.



16-17. Lincolnshire HAR: training Heritage Stewards (image courtesy of Lincs HAR)

There are also specialised training events, e.g. for conservation area training. Free CPD events have been offered for volunteers on such topics as IT, places of worship and 'deserted medieval towns' (Lincs HAR website: news). A 'buddy' scheme has been run since February 2011, with experienced Heritage Stewards offering help and advice to new stewards on their first few surveys (ibid.).

Volunteer experiences are being actively evaluated; in April 2011, a (voluntary) volunteer Feedback Co-ordinator was recruited to work with the Heritage Stewards 'to help develop training methods and improve (the Heritage Trust of Lincolnshire's) level of support'. They 'will be contacting... volunteers over the next few weeks to discuss ideas on improving the experience of Heritage Stewards' (Lincs HAR website: news). The intention was to provide an independent outlet for volunteers' feedback. Surveys have also been evaluated throughout the project (M Godfrey, senior project officer).

As well as the opportunity to volunteer, local community members also have the opportunity to learn more about their local area and the historic environment as a whole, via free lectures (open for all) on topics such as archaeology and architecture (Lincs HAR website: training events). Matthew Godfrey perceives a significant positive outcome of the project as the increased awareness raised in the local area of the historic environment.

The historic environment has benefitted from detailed surveys of historic assets across the county and a far greater knowledge of what is currently at risk. To date, 3200 surveys have been carried out by 220 volunteers. In addition, the profile of Lincolnshire's heritage has been raised among many local authorities (M. Godfrey), Without the Lincs HAR project, the information on Heritage at Risk in Lincolnshire would certainly be less substantial; 'local authority Buildings at Risk registers for Grade II buildings are not complete and only 1 of the 7 local authorities has undertaken a full survey within the last 5 years' (Lincs HAR website: About the project). The surveys are being used to identify potential BPT projects (reduced (M. Godfrey), so this opportunity would have been lost and assets potentially left at risk for longer.

The current phase of the project still has two years to run, and the Trust is currently discussing ways in which volunteers can maintain involvement with Lincolnshire's historic environment after the project. The current phase is intended as a pilot, a model to test feasibility of such schemes 'on a national scale' (project leaflet). After evaluating which aspects have worked successfully and which less so, it is hoped that the scheme can be rolled out nationwide (M. Godfrey).

The project experience has been shared via various talks held at local Archaeological Trusts other Trusts (M. Godfrey senior project officer). The HAR team visited Lincolnshire University for Student Volunteering Week in February 2011, to 'showcase the work' of the Heritage Stewards and promote the volunteering opportunity (Lincs HAR website: News). There has also been extensive publicity in the local press about the project (M. Godfrey).

The project is an instance of a heritage organisation contributing to 'Community Empowerment'; the local community members involved are enabled to help record, understand and ultimately shape and conserve their local environment, potentially influencing planning in their area. 'Social Action' is also demonstrated by the valuable and extensive voluntary efforts to benefit the local area, and to an extent the heritage group's work on a project that would usually involve considerable input from the local authority's planning department means that the project also involves 'Opening up Public Services'.



18. Lincolnshire HAR: training Heritage Stewards in building surveying (image courtesy of Lincs HAR)

Birmingham Heartlands Canal Ring Project

Delivery organisation	Waterways Trust
Location	Birmingham
Duration	Planned to start May 2011 and run until November 2013

The project was initiated as part of a wider initiative to promote better health and well-being amongst communities in the Birmingham Heartlands area, by the Heart of Birmingham PCT and Birmingham City Council. The Waterways Trust will be the coordinating organisation.

The scheme is currently in the planning phase; the Birmingham Heartlands Partnership constitutes Ackers Adventure, Bournville Village Trust, Wildlife Trust for Birmingham and the Black Country, Birmingham City Council, British Waterways, Enterprising Communities, Groundwork and Heart of Birmingham Primary Care Trust have all joined as partners. The funders are Big Lottery's Access to Nature Fund (almost £230,000), Birmingham City Council and Heart of Birmingham Primary Care Trust (Waterways Trust website: Birmingham Heartlands Canal Ring).

The project aims to make the historic canal network accessible for local residents, and to increase engagement through such activities as community art works and educational projects and cultural events (Call for Tender 2011) 'Through this project, residents will be empowered to transform their local environment. They have the opportunity to connect with the heritage of their neighbourhood and use the canal to celebrate and showcase their own culture and traditions.' (Kim Chester, WT Development Manager via WT website). It is also intended that the Heartlands Ring canal network will be used as a 'tool for regeneration' (Call for Tender 2011). The project's detailed aims are to break down barriers ('physical and social, real and conceived' between the community and the canals), to develop and promote the ecological and social potential of the canals for the local communities (Zohra Mahmoud, project manager). Without the project, the consultations so far have shown that few local people are currently accessing the canal network; issues with perceptions and environmental problems such as graffiti have been identified. It would be difficult to break down the barriers without such a scheme; 'local people must take ownership' of the area (Z. Mahmoud).

The objectives are to increase access to the canals, improve the environment, which should in turn encourage local businesses to stay and others to be attracted, community development (including the involvement of people of different faiths and backgrounds), health improvement (to reduce child obesity by promoting walking and cycling) and to improve perceptions of the canals. As part of the project, local schools and businesses will be encouraged (by visiting volunteer coordinators) to 'adopt' a stretch of the canal, in terms of activities such as clearance and putting up benches by the latter, and educational activities by the former focused on both wildlife and social and economic history (Z. Mahmoud). If businesses decide to take financial ownership of areas of the canal, this will be carried out through British Waterways.

Consultations carried out to date have gathered the background data (numbers of people accessing the canals, usage types), and regular evaluation will be carried out throughout the project to gauge its effect and progress across the issues identified in the consultation. There will be quarterly and annual reviews by the partners. The project's aims indicate that it will provide a valuable contribution to civil society and the historic environment via 'Opening up Public Services'; local businesses and school groups will contribute to management and maintenance of their environment.

SAVE Britain's Heritage Pathfinder campaign

Delivery organisation	SAVE Britain's Heritage
Location	Northern England and Midlands
Duration	Ongoing since 2002

The Government's Pathfinder programme began in 2002. The aim of the scheme was to regenerate areas and rebuild housing markets in areas with low market demand. This incorporated proposals for large scale clearance and replacement of homes in nine areas in Northern England and the Midlands.

SAVE Britain's Heritage were aware of the programme from the outset and started campaigning after the implications of the scheme became clear, in terms of the scale of demolition of existing housing. The campaign is ongoing until the threat of demolition ends and ongoing legal disputes are resolved. Although funding for the Pathfinder scheme has been withdrawn, many local authorities are still intending to proceed with demolitions planned as part of the scheme which are now built in to their Local Development Plans. SAVE are particularly involved at present with areas of Liverpool and Gateshead.

The overriding aim of the project (W. Palin personal comment 03/05/2011) is to campaign against the demolitions proposed as part of Pathfinder. This involves three more detailed aims:

- to work with individual residents and local groups in areas threatened with demolition
- to lobby national government to change their Pathfinder policy
- to raise awareness of the negative effects of the scheme, on both places and communities.

As a result of SAVE's work with local groups and ongoing campaigning, the number of proposed demolitions under the Pathfinder scheme have dropped sharply, thus large areas of historic housing have been preserved and are being regenerated, rather than destroyed and replaced. SAVE's intention, and achievement, has been to not only fight demolition, but to propose viable alternatives. Part of this work has involved keeping Pathfinder in the national press and under the political spotlight. Through legal action, local authorities have been deterred from proposing Compulsory Purchase Orders and demolition. It is worth noting that some of the local authorities charged with implementing Pathfinder initiatives do not have conservation officers who would be able to examine the historic environment issues arising, so SAVE's work in highlighting these is especially valuable (Wilkinson 2006: *Pathfinder*, SAVE publications).

The second beneficial effect has been the 'empowerment and education of local people' (William Palin, Secretary, SAVE Britain's Heritage): local people have been enabled to lobby for their cause. Advice and guidance has been offered both on an individual basis, by talking to groups and people living in Pathfinder neighbourhoods, and via publications. An important aspect of SAVE's work is helping to put these groups in contact with experts and professionals, such as engineers and structural surveyors who could counter local authorities' claims that the housing stock is obsolete. SAVE have thus succeeded in giving 'a national voice to their concerns' (ibid.), allowing local people to have their say against decisions made and implemented from above. Legal support is also offered, and small grants. SAVE is funded entirely from personal donations, so this is also an instance of 'Social Action' via philanthropy.

Partnerships with professionals have been essential to the campaign; in addition to the legal professionals employed, other professional partners include engineers, surveyors and architects. For example, the architects firm Mark Hines have drawn up an alternative scheme to rehabilitate more than 400 houses in place of the proposed demolitions in East

Manchester, which seems likely to be implemented at least in part. Most of the partners were ongoing contacts that SAVE had worked with prior to the project.

An ongoing challenge has been that the campaign is against a programme which is 'strongly supported and lavishly funded by central government'; SAVE describe it as a 'David and Goliath battle' (W. Palin). SAVE have been accused of holding back regeneration by campaigning against demolition, but feel that in many cases no regeneration has been planned and very little achieved. This opinion is supported by the fact that when the House of Commons Public Accounts Committee reviewed the Pathfinder scheme after 6 years (2008), they found that over 2,500 homes had been demolished, but less than 350 built, and in summary stated that there was a risk that 'demolition sites... may be the Programme's legacy'

SAVE are continuing to fight demolitions related to Pathfinder, and are currently actively engaged with communities in Liverpool and elsewhere. They continue their work 'to promote alternatives to demolition, to prevent further loss of decent housing stock' (W. Palin), while discrediting and exposing the 'misguided policies and economies' behind Pathfinder. The project has been shared in a multitude of ways, including publications, press coverage, exhibitions, email networks and other online community forums.

Since the campaign is still ongoing, with legal actions in progress, the communities involved currently face an uncertain future, but SAVE feel that 'with support and a change in policy, it could be an early opportunity to rediscover regeneration through renovation, the favoured method in many areas prior to Pathfinder' (ibid.).

SAVE's campaign against the Pathfinder demolitions and support of the local communities involved equips and empowers them to make an informed and concerted effort to influence the planning process and their local area, and to protect both their community welfare and the historic environment in which they live.

Summary

The six case studies each have different aims, are based in geographically distinct areas and stem from a wide range of funding and delivery sources, however some common messages emerge throughout with regards to achievements, challenges and support needs.

In contributing to both civil society and the historic environment, a number of specific benefits were evidenced by the projects:

- A wide range of skills and knowledge gained by the volunteers involved – from practical skills (archaeological conservation, traditional skills, historic environment surveys) to fundraising, IT skills and knowledge of the planning process.
- Empowerment of groups and individuals to better understand their local environment.
- Increased awareness and education of local community members about heritage and their local historic environment – a significant benefit both to the volunteers directly involved, and often to others in addition, through such resources as a museum, an interpretation centre and lectures.
- Community cohesion, through working together, common goals and bringing groups together who would not usually come into contact, for instance the young Waterways Action Squad volunteers and the organisations they were involved with.

The challenges faced were:

- Organisational capacity
- Funding and fundraising (particularly in the case of CSI Sittingbourne)
- Unexpected financial obstacles (at Colchester)

The following sources of support were of particular value to the projects and groups:

- Corporate philanthropy, from equipment and premises, to funding, donations and flexibility in their activities (in the case of the developer Taylor Wimpey at Colchester)
- Engagement of local authorities – as delivery and funding partners
- Input from professionals – e.g. architects, legal professionals, conservators – working directly on projects and for training and guidance
- Forming strategic partnerships, and utilising the strengths of each partner to the full during the project

The success of the projects can be attributed to:

- Innovative ideas – activities, fundraising
- The dedication and focus of the individuals and groups involved
- Inspiring local communities to take ownership of their historic environment and involve themselves, e.g. by volunteering or otherwise contributing to a cause
- Thorough project planning and consultation before commencement, where possible
- The knowledge and skills base of heritage organisations
- Retention of volunteers and their valued skills base
- Utilising contacts and networks (e.g. SAVE's architecture and legal connections)
- Investment in volunteers: providing training and skills

Appendices

1) Methodology

Online questionnaire

The questionnaire was piloted between 18th and 25th February with 4 organisations, and the feedback used to complete final edits and to plan the launch strategy. The initial draft was created by Alex Homfray (BOP Consulting), and refinements suggested and made as a result of discussion between A. Homfray, The Heritage Alliance and Laura Clayton (EH).

The questionnaire was launched online on Survey Monkey on 3rd March, and the link sent to representatives of all members (via the mailing list used to distribute THA's Update). The representatives were advised to send the link to the most appropriate person in their organisation to complete the questionnaire, if they felt that they were not the most appropriate. Online circulation was chosen as the most convenient format for most THA members, therefore with the intention of optimising response rate, but respondents were informed that a paper copy could be provided if necessary. 1 respondent requested this.

All non-responders were chased up individually by email on 11th March to encourage response, and telephone chase-ups carried up as necessary in the weeks commencing 14th and 21st March. The final deadline for responses before analysis began was 29th March 2011.

The introduction to the questionnaire clarified its aim and the purposes for which it would be used and published. It also informed respondents that all personal data would be treated confidentially and would only be available to The Heritage Alliance, and that contacts would not be passed on to third parties.

Follow-up interviews

These were carried out for the following purposes:

- a) To follow up on specific questionnaire responses which highlighted interesting or surprising issues, and for which it was felt more information would enhance the research findings.
- b) To gain further insight into themes and trends which emerged after analysis of the questionnaire results. The areas that stood out to be further investigated were core/development funding, support needs towards all themes, and activities contributing to the 'Opening up Public Services' theme.

Follow-up interviews were carried out with 6 respondents in weeks commencing 25th April and 2nd May 2011. 1 respondent completed a follow-up by email, other because telephone contact was unsuccessful, so the respondent was followed up via email. All follow-up interviewees had given their consent to be further contacted in the questionnaire (question 29). A significant majority (51, or 85% of respondents to this question) of questionnaire respondents consented.

Case studies

Research was carried out into recent (2005 onwards) and ongoing projects and activities carried out by THA members and (where applicable) their local or smaller member organisations, which demonstrate the contribution of these organisations to civil society. The sources of information were online (members' websites and associated links; national and local news sites) and published (members' newsletters and journals). In addition, project examples suggested by questionnaire respondents (both in response to the question where this was requested, and sometimes noted in answers to other questions, particularly concerning activities) were added to the ongoing project list. In total over 90 project examples, including activities, timescale, location, funding sources and the relevant Big Society 'theme/s' (social action, community empowerment and opening up public services), were revealed by these two sources.

The final (6) case studies were selected by their relevance to the three Big Society 'themes' ('Social Action', 'Community Empowerment' and 'Opening up Public Services') and their recentness. Projects were also selected on the grounds that they were run by organisations

which were not members of the Historic Environment Forum (HEF), to avoid cross-over with case studies submitted to Heritage Counts 2011 by HEF members. It was also intended to cover a range of foci of work (e.g. archaeology, collections, historic environment) and geographical areas within England. The final selection of case studies were contacted (initially by email, then interviewed, 4 by telephone and 2 in person) for further information.

All participants were informed of the intended usage of the information supplied. Case Study interviewees where requested were sent a copy of any material to be published prior to publication. 2 case study representatives requested this information.

2) Abbreviations and acronyms

Organisation names and other terms are used in full in the first instance throughout this report and sometimes abbreviated thereafter. A full key to those abbreviated is given below:

Organisations:

AGT: The Association of Gardens Trusts
AHF: The Architectural Heritage Fund
AIA: Association for Industrial Archaeology
APT: UK Association of Preservation Trusts
ASHTAV: Association of Small Historic Towns and Villages of the United Kingdom
CBA: Council for British Archaeology
Church of England CCB: Church of England Cathedrals and Church Buildings Division
CPRE: Campaign to Protect Rural England
HCA: Heritage Crafts Association
HCT: Historic Chapels Trust
HEART: Norwich Heritage Economic & Regeneration Trust
HHA: Historic Houses Association
HRP: Historic Royal Palaces
HTF: Historic Towns Forum
ICON: The Institute of Conservation
MMT: The Mausolea and Monuments Trust
NARTM: National Association of Road Transport Museums
NHIG: National Heritage Ironwork Group
Church of England CCB: Church of England Cathedral and Church Buildings Division
NPS: National Piers Society
OPT: Oxford Preservation Trust
PRT: The Prince's Regeneration Trust
RESCUE: RESCUE - The British Archaeological Trust
RTPI HEG: Royal Town Planning Institute Historic Environment Group
THA: The Heritage Alliance
WMT: War Memorials Trust

Some frequently used terms are also abbreviated: these are given below. Where directly quoted responses contain abbreviated terms, these have been changed to the full term in the first instance.

BAR: Buildings at Risk
BPT: Building Preservation Trust
LA: Local Authority

3) References/sources of information

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Images

1. Gatka Martial arts to mark Anglo Sikh Heritage Day at Eastnor Castle (privately owned by Historic Houses Association member). Online at: <http://www.hha.org.uk/learning-and-outreach-2/outreach/anglo-sikh-heritage-trail.html> . Accessed 09/05/2011. Reproduced courtesy of HHA.
2. Traditional hedgerow laying by Waterways Action Squad volunteers. Whaley Bridge, Derbyshire. March 2011. Courtesy of L. Unsworth, Waterways Action Squad
3. Dry stone walling by Waterways Action Squad volunteers. Leeds / Liverpool Canal in Rishton. March 2011. Courtesy of L. Unsworth, Waterways Action Squad
4. Traditional hedgerow laying by Waterways Action Squad volunteers. Whaley Bridge, Derbyshire. March 2011. Courtesy of L. Unsworth, Waterways Action Squad
5. As above.
6. Dry stone walling by Waterways Action Squad volunteers. Leeds / Liverpool Canal in Rishton. March 2011. Courtesy of L. Unsworth, Waterways Action Squad.
7. As above.
8. CSI Sittingbourne laboratory, located inside town centre shopping mall. Sittingbourne, Kent. 08/04/2011. Author's own.
9. CSI Sittingbourne laboratory, volunteers Sylvia Smith and Patricia Horne examining objects. Sittingbourne, Kent. 08/04/2011. Author's own.
10. CSI Sittingbourne laboratory educational wall display. Sittingbourne, Kent. 08/04/2011. Author's own.
11. CSI Sittingbourne archaeological exhibition educational material. Sittingbourne, Kent. 08/04/2011. Author's own.
12. CSI Sittingbourne archaeological exhibition from outside, shopping mall location opposite laboratory. Sittingbourne, Kent. 08/04/2011. Author's own.
13. Fundraising for Colchester Roman Circus at Colchester Utd v. Oldham football match. Online at: <http://www.romancircus.org/2010/02/24/football-fans-donate-1084/> . Accessed 09/05/2011. Courtesy of Destination Colchester and copyright Howard Lake. Available for use under licence: http://creativecommons.org/licenses/by-nc/2.0/deed.en_GB .
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17. Training volunteer Heritage Stewards in surveying heritage assets, Lincolnshire Heritage At Risk project. Corby Glen, Lincolnshire. 12/03/2011. Courtesy of M. Godfrey, Lincs HAR.
18. Training volunteer Heritage Stewards in surveying heritage assets, Lincolnshire Heritage At Risk project. Market Rasen, Lincolnshire. 25/11/2010. Courtesy of M. Godfrey, Lincs HAR.

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