

## Review of 2011

Leadership • Influence • Enterprise

# The Heritage Alliance

### Our ambition

The Heritage Alliance's Strategic Plan 2012-15 marks a coming of age. Over the past ten years, thanks to commitment from members and partners, the Alliance has grown from an embryonic federation to a leading advocate for its members and for our heritage.

The Alliance - independent and at the centre of extensive networks - is now a key driver in the heritage movement. Our new Strategic Plan confirms our ambition as well as our direction. The ambition - to be the voice of the independent heritage movement - takes as its starting points these three principles:

- that the non-government heritage organisations have a unique and crucial role in protecting and promoting our heritage
- that enjoying and caring for our heritage is of lasting public value for present and future generations
- and that by valuing the contribution made by thousands of groups, individuals and volunteers, the Alliance celebrates the diversity of the heritage movement.

### Leadership, influence, enterprise

The Alliance's role is to champion a strong and prominent independent heritage sector.

The rationale behind all the Alliance does is that by working together we can make more of a difference. With daunting changes underway in legislation and policy, infrastructure and funding, the Alliance will advocate, share, support and develop in order to achieve its objectives. In addition, the title of our Strategic Plan 2012-15 promotes the qualities needed to address these challenges successfully - leadership, influence, enterprise. This is the sea change at the heart of the 2012 Strategic Plan.

There is clearly still much to be done to achieve a level of influence equal to the breadth and depth of our members' commitment. But with the support of our

members and partners the Alliance intends to narrow this gap, building on the steady progress made since 2002.

### Our year

For many heritage organisations and individuals, 2011 brought a mixture of challenges and opportunities. The Alliance used these opportunities to achieve the ambitions of the 2009-12 Strategic Plan. In particular we strengthened our role in the heritage sector by taking on important new responsibilities from English Heritage, further developed the Cultural Olympiad programme (Discovering Places) and played a leading role in national debates such as on the future of the planning system and on philanthropy.

### 1 Clear messaging and more powerful advocacy

The Heritage Alliance continued to brief decision-makers at ministerial, parliamentary and official level on the value of heritage and the contribution of the non-government heritage bodies. Our Chairman, Loyd Grossman, has championed the independent heritage sector in Westminster and Whitehall, raising concerns on a wide variety of issues affecting the sector.

Our advocacy has informed and strengthened the debate around the Localism Bill (now the Localism Act 2011) and National Planning Policy Framework. Our parliamentary lobbying raised the profile of the independent heritage bodies, where the strong consensus across our membership showed the depth of concern across the heritage movement.

The Alliance has also taken up the challenge of engaging closely with the Government's philanthropy programme to ensure that heritage aspects are addressed alongside the arts focus. Our Chairman sits on the new DCMS Philanthropy Programme Management Board.

Our Heritage Alliance Heroes Award celebrates the national importance of volunteering in engaging people and adding significantly to our resources.

The Alliance also responded to major consultations on behalf of the membership, publicising these and many more opportunities through the far-reaching e-bulletin *Heritage Update*.

## 2 Sharing knowledge and experience

The four Advocacy Groups (Spatial Planning, Funding, Inclusion and Rural Heritage) capture the specialist expertise within the membership, using their knowledge and experience to establish policy positions, comment on proposals and share information and resources with others.

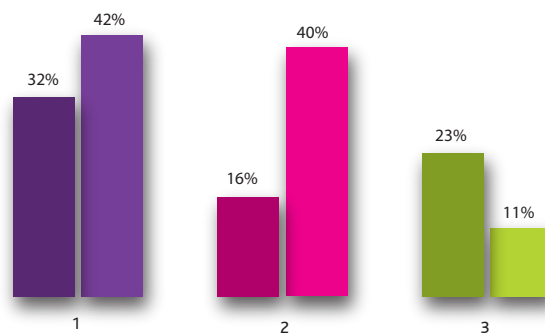
This year the Rural Advocacy Group held a successful policy day at Blenheim Palace to examine with Alliance members and colleagues how the rural heritage delivers a wide range of public benefits.

The Alliance also brings the experience and expertise of members into sectoral projects, research and initiatives such as Heritage Counts. This year the Alliance led a major research project for Heritage Counts, examining how our member organisations strengthen civil society. The quality and quantity of responses armed us with ample evidence to substantiate the contribution the independent heritage sector makes to contemporary society, and how caring for our heritage expresses civic engagement and social responsibility.

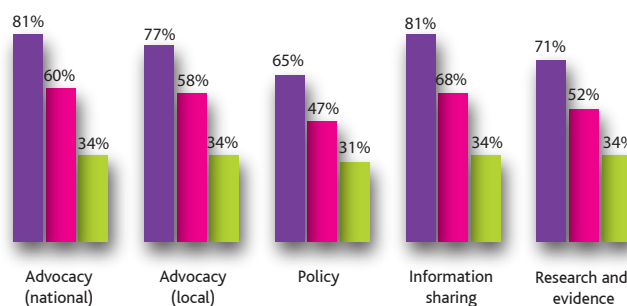
### Strengthening Civil Society

The research found that heritage organisations support individuals to take action in caring for their heritage through campaigns, membership, by providing information, opportunities to share information as well as guidance and training (1). 74% of our members said they did a lot or a little work on this.

Our members enable voluntary groups to work on behalf of their communities, providing funding advice, guidance and training (2). Over half, 56%, of our members offer this kind of support. A growing number, 34%, advise voluntary groups on managing local assets and services or provide training and skills (3).



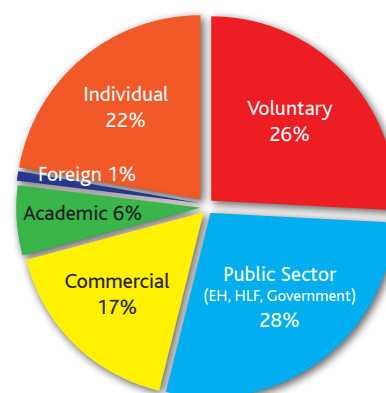
Surveys like this help identify what support our members need to do even more. Advocacy at national and local level indicates that with better recognition, they could achieve more; restrictive policies or legislation are now noted; the importance of sharing information and research work also came high on the list of priorities. The Alliance will take these into account in determining its advocacy and support to members.



### Communication

Our information-sharing function is paramount. *Heritage Update* now reaches around 13500 in the UK and beyond.

### Heritage Update circulation 2011



This year it has served to keep readers informed of the debates around planning reform, with a regular summary of developments and links directing readers to consultation responses and more in-depth information.

“ As ever a brilliantly useful newsletter ”

“ Big thanks for your work on Heritage Update - always informative, and a bit of a lifeline for those like me outside London ”

The Alliance is grateful to Donald Insall Associates, whose sponsorship of Heritage Update enabled us to create a more user-friendly format, a smoother production process, and allows mapping of our readership in the UK and worldwide.

Our refreshed website illustrates the work of the Advocacy Groups, projects and members with a range of online resources, including the Heritage Funding Directory and the Inclusion Hub.

Our tweets are a quick way of transmitting news; particularly on the fast-moving developments around planning reform. We now have over 2500 followers, and are growing our 'followership' every day.

### 3 Leading collaborative working in the heritage sector

Working together - the founding principle of The Heritage Alliance - has taken new directions this year.

Responding to the desire for more interaction, the Alliance held twice as many members' forums on major issues, such as the Heritage Lottery Fund's Strategic Plan and the National Planning Policy Framework, in addition to the Rural Advocacy Group's policy day and the well-established Heritage Day. The places of worship forum, POWAlliance, also flourished on a new voluntary basis, extending its membership and hosting a lively annual meeting in October.

Discovering Places, the Alliance's Cultural Olympiad project, illustrates well how partnership working takes our messages out to new audiences. The Walk the World strand is led with the Royal Geographical Society, Meet the Species with Bristol Natural History Consortium, and the regeneration strand with the Field Studies Council. The whole project is delivered by the Alliance on behalf of LOCOG (the London Organising Committee for the Olympic Games).

As well as representing the independent heritage bodies in heritage and related forums, the Alliance directly supports joint working ventures where our independence and networks add value to joint

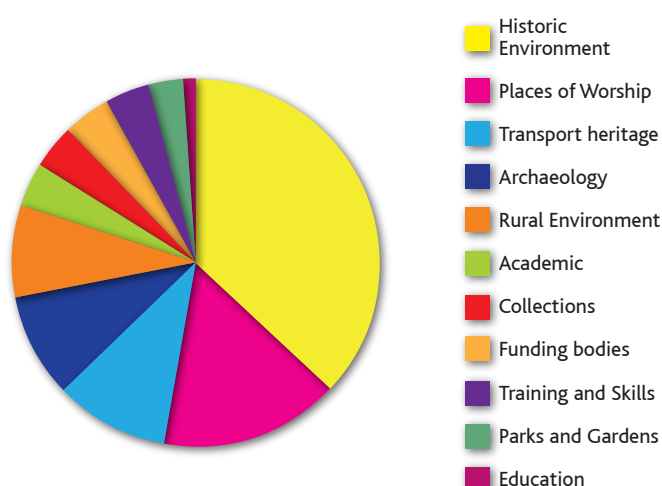
enterprises. Most exciting is the new partnership of the Alliance, Civic Voice and the National Trust taking on responsibility for the central co-ordinating services for Heritage Open Days, the great annual celebration of our heritage.

Similarly, the Alliance is now the secretariat for the overarching Historic Environment Forum and for the Advisory Board for the National Heritage Protection Plan, both previously managed by English Heritage.

### 4 Organisational development Membership

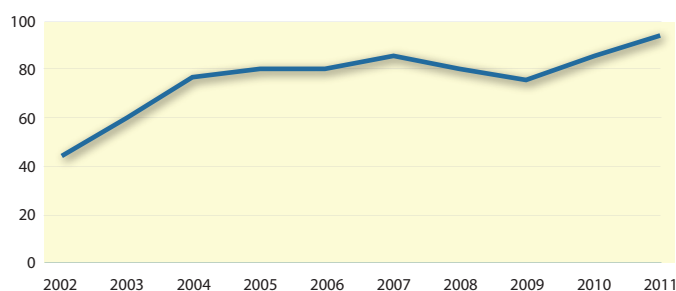
Membership exceeded 90 for the first time ever, rising to 92 from 78 in 2010. This substantial rise demonstrates a constant demand across the sector for joined-up advocacy, interaction and support.

#### Heritage Alliance members



Alliance membership has more than doubled from 44 founding members to the current 92. But if the Alliance truly represents the heritage movement, membership criteria need to be reviewed in the light of stronger local voices and the ever-changing interpretation of what constitutes our heritage.

#### Alliance Membership 2002-11



## Project work

Projects are now used to maximise capacity on key issues. This year our Parliamentary Liaison Team was an exemplar, adding a dedicated resource at critical policy junctures. Our proactive team ensured the briefings were persistent and consistent, built good relations in the Lords and Commons, worked closely and constructively with English Heritage, and engaged actively with our members - holding two seminars to inform responses to the Select Committee Inquiry and CLG consultation on the NPPF.

Discovering Places is coming to fruition with a portfolio of projects in advance of the 2012 Olympics, publicised through a lively e-bulletin. The free online Heritage Funding Directory underwent a timely revision and expansion thanks to a grant from Country Houses Foundation, just when financial resources are under such severe pressure. These projects are all financially self-supporting.

## Our finances

The last financial year ended with a surplus of just over £1000. The full Trustees' Report and Accounts 2010-11 are on our website at [www.theheritagealliance.org.uk/annual-accounts](http://www.theheritagealliance.org.uk/annual-accounts)

We are grateful to English Heritage for its support though the National Capacity Building Programme. A small reduction in the 2011-12 grant meant the shortfall had to be made up from other sources and one welcome development this year was a much higher level of sponsorship. Continued support from Ecclesiastical Insurance Group, now acting as our core sponsor 2011-12, enables us in particular to maintain a high quality Heritage Day; and new sponsorship from Donald Insall Associates allowed us to improve the format of Heritage Update. A grant from Country Houses Foundation meant the Heritage Funding Directory could be updated and expanded.

We have also consolidated a range of revenue streams contributing to core costs - so much so that earned income will almost double by March 2012.

These and other measures have helped towards our long-term goal of reducing our reliance on the National Capacity Building Grant, from 75% in 2005 to 55% in 2011-12.

# The Heritage Alliance

## Our people

### Chairman:

Loyd Grossman OBE FSA

### Deputy Chairman:

Ian Lush, Architectural Heritage Fund

### Treasurer:

Charles Angus

### Trustees:

Ben Cowell, National Trust

Catherine Croft, C20th Society

Denis Dunstone, Transport Trust

Mike Heyworth, CBA

Peter Hinton, IfA (from October 2011)

Mary King

David Souden, Historic Royal Palaces

Crispin Truman, Churches

Conservation Trust

Nick Way, Historic Houses Association

### Staff:

Kate Pugh, Chief Executive

Emma Robinson, Policy &

Communications Officer

Toks Ferguson, Office Manager

### Discovering Places Team:

Claire Horan, Anna Godsiff,

Karen Bewick and Susannah Minett

### Places of Worship Team:

Deborah Jarman to April 2011

Becky Payne from April 2011

### Parliamentary Team:

Henry Russell, Sarah McCarthy

### Heritage Counts intern:

Alice Brackenbury

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