



Evaluation of the Giving to Heritage Programme

Summary

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Introduction

The Giving to Heritage programme is funded by the Heritage Lottery Fund (HLF) under the Catalyst initiative. The Catalyst: Capacity building programmes form part of a broader partnership between HLF, the Department for Culture Media and Sport and Arts Council England. It aims to encourage more private giving to culture and heritage, and to build the capacity and skills of cultural and heritage organisations to fundraise from private donors, corporate sources, trusts and foundations.

Catalyst: Umbrella grants were developed to offer eligible Umbrella bodies grants to deliver a range of services to support heritage organisations to increase their capacity to fundraise and diversify income. The Giving to Heritage programme received the largest of the grants awarded in the first phase of the programme, benefiting from a programme value of £620,000 including £92,000 worth of professional volunteer input and matching funding to be raised from revenues generated from the training.

It was announced in March 2016 that The Heritage Alliance, in partnership with the Institute of Fundraising, had been awarded a further £250,000 from the Heritage Lottery Fund (HLF) Catalyst Umbrella programme to extend the Giving to Heritage for a further 12 months from June 2016. The announcement came in response to strong and growing demand from the sector and positively received activities from Phase 1 of the programme.

The programme aimed to achieve the following outcomes:

- Improved awareness amongst beneficiary organisations of fundraising strategies and techniques.
- Increased numbers of beneficiaries confident in implementing fundraising techniques as appropriate for their organisation;
- Increased levels of appropriate fundraising skills by beneficiaries, as evidenced by increased levels of donor recruitment and stewardship;
- Increased levels of financial resilience perceived by beneficiary organisations as a result of accessing training opportunities;
- Increased numbers of peer support networks formed and sustained as a result of Giving to Heritage programme activities; and
- Increased sharing of experiences, learning and expertise, opportunities for partnership working and coordination of resources identified amongst beneficiaries as a result of beneficiary uptake of peer support networks.

The evaluation was based on a combination of desk research, consultation with 32 stakeholders involved in the management and delivery of the programme, an online survey generating 153 valid responses and over 20 in depth consultations with organisations and individuals benefiting from the programme offer.

Management arrangements

The Giving to Heritage programme is **delivered through a partnership between The Heritage Alliance and the Institute of Fundraising**, drawing upon the Heritage Alliance's access to the heritage community and the fundraising training expertise of the Institute of Fundraising. As lead partner, **The Heritage Alliance** was responsible for maintaining relationships with the main programme partners including the HLF and IoF and, in terms of the programme extension, also CAN Invest and the Community Shares Company. The programme benefited from the management of a Heritage Alliance Project Lead until his departure in January 2017. A Project Officer took over the role until the end of July 2017. The Heritage Alliance managed the initial marketing and promotion of Giving to Heritage, coordinating stakeholder management, marketing and communications and reporting to the HLF. The Heritage Alliance as also responsible for recruiting participants to the programme, publicising activity, recruiting mentors and volunteer Heritage Experts, as well as establishing the programme steering group.

As the programme evolved marketing efforts were shared between The Heritage Alliance and Institute of Fundraising to maximise reach.

The Institute of Fundraising has been responsible for the planning and delivery of the Giving to Heritage programme in partnership with The Heritage Alliance. An Institute of Fundraising Project Manager was supported by a Project Co-Ordinator during Phase 1 whilst Phase 2 was managed by an Institute of Fundraising Project Officer with senior management input from the Head of Professional Development.

The Institute of Fundraising has reported into The Heritage Alliance throughout the programme, providing updates and relevant data to inform progress reporting to the HLF and the programme Steering Group. The Institute of Fundraising was also responsible for leading the development of the workshop content with the exception of the social investment training which was developed by Can Invest and the Community Shares Company in conjunction with The Heritage Alliance.

Strategic guidance to the programme was provided by a **Steering Group** with responsibility for reviewing and approving management and financial reports against programme targets. Chaired by the Chairman of The Heritage Alliance's Funding Advocacy Group, the Steering Group included senior representatives from both The Heritage Alliance and Institute of Fundraising alongside senior stakeholders from the heritage sector. The Steering Group has provided valuable strategic guidance from an informed organisational and sector perspective whilst providing links to sector-specific issues and local and/or sector contacts to support programme delivery.

Operational scrutiny and planning was provided through a **Project Management Group** responsible for day-to-day project delivery, planning and scheduling, financial management, progress reporting and information sharing between The Heritage Alliance and the Institute of Fundraising. With formal monthly meetings complemented by regular communication, the group comprised the Institute of Fundraising Head of Professional Development, The Heritage Alliance Chief Executive, Giving to Heritage Project Manager and Institute of Fundraising Heritage Project Officer.

Project management arrangements are thought to have worked well overall, but also to have improved considerably in the latter half of the programme. Indeed, the latest round of stakeholder consultation has revealed a variety of examples of **effective partnership working between what remain two quite different organisations in terms of scale, capacity, skills and sector** - all to the overall benefit of the Giving to Heritage programme.

Programme development and delivery

Training commenced in June 2014 following an initial pre-delivery phase comprising initial marketing activity, development of the Giving to Heritage website and curriculum design. The main programme activity was initially to run to March 2016 although The Heritage Alliance and Institute of Fundraising secured a one year extension to the programme to June 2017.

The initial Phase 1 offer comprised:

- **99 face to face training workshops**
- **50 day long telephone, Skype or face to face advice surgeries**
- **50 Action Learning Sets**
- **24 mentoring pairings**
- **30 webinars**

The programme offer has evolved in response to patterns in take up of the various training offers and feedback from participants and delivery staff. The major changes from Phase 1 were headed by an Executive Coaching offer providing bespoke training specific to one organisation over a period of up to nine months which replaced the 50 Action Learning Sets¹.

The Executive Coaching programme begins with an initial meeting between an Institute of Fundraising consultant and senior managers of the organisation to discuss their development needs and to ensure that the resulting guidance is relevant and tailored to their resources and requirements. The participating organisation contributed an amount between £500 and £2,000 which was double match funded by the HLF with activities scaled accordingly. Other changes to the initial Phase 1 offer included the downscaling of the Mentoring Programme to 11 pairings and a streamlined approach to the Surgeries in the form of a one hour, free consultancy session designed to assist people at all levels of heritage fundraising through support and guidance from an Institute of Fundraising consultant.

The Phase 2 offer offered for the 12 months to June 2017 included:

- **40 face to face training workshops**
- **Executive Coaching programmes**
- **One hour, free consultancy sessions**
- **10 webinars**

A key change to the programme offer in the Phase 2 extension was the inclusion of support for Social Investment training including Community Shares. As a relatively new area of income diversification for the heritage sector, both programme partners and heritage organisations are learning how best to approach and support this element. This was reflected in an initial lack of demand for workshop places and feedback from some participants who found it largely irrelevant to their organisation prompting partners to produce a webinar to raise awareness of the issues and a survey to gauge the relevance of the topic prior to the workshops.

Key statistics summarising the entire Giving to Heritage programme offer and take-up:

- **148 workshops delivered with 1,569 places taken up by 1,101 unique individuals and 753 unique organisations**
- **30 webinars presented**
- **197 support and consultancy sessions undertaken with 171 unique participants from 144 unique organisations**
- **1,764 participants supported in workshops and support and consultancy sessions**
- **1,282 unique individuals engaged in Giving to Heritage**
- **929 organisations represented at Giving to Heritage opportunities**
- **10 Executive Coaching programmes undertaken**
- **11 mentoring pairings formed**

The role of volunteers in delivering or supporting elements of the Giving to Heritage programme has been substantial. Sourced directly by The Heritage Alliance, the professional time of the mentors and Heritage Experts has all been provided on a pro-bono basis. When added to the time devoted by the Steering Group volunteers, the first phase of the programme exceeded the added value target requested by the HLF over and above the £0.5m grant. **The overall value of professional volunteer time across the whole programme £152,165.**

¹ Half day sessions for 12 people on topics chosen by the group at a cost of £20 per person

Profile of Giving to Heritage Survey Respondents

The survey of programme participants delivered as part of the final evaluation provides a range of profile information on the organisations represented by the 153 valid respondents. Whilst representing only a sample of the overall population of programme participants, the size and composition of the sample is sufficient, where relevant, to support an analysis of feedback on, and impact of, the Giving to Heritage programme by a range of organisational variables.

Headline statistics on the profile of survey respondents which are agreed to broadly reflect the overall composition of Giving to Heritage participants include:

- **40% of respondents in terms of FTE employees alone work for small organisations of five or fewer employees**
- **When combining employees and volunteers, the largest group of respondents (27%) work and/or volunteer for organisations supported by between 101 and 500 people**
- **22% of respondents stated that their organisation was based in London, followed by the South West (17%) and West Midlands (13%)**
- **Participants from the East of England and Yorkshire and the Humber accounted for 4% and 6% of respondents respectively**
- **Approximately half of respondents classified at least one of their organisations areas of heritage as ‘built environment’ with 47% stating ‘community and local history’ and 39% ‘museums and galleries’**

Marketing and promotion activities

The Giving to Heritage programme requires both a strategic and effective approach to marketing to promote an England-wide offer with equitable geographical coverage across the nine English regions. The mid-term evaluation of the Giving to Heritage emphasised the scale of this task given that the largest group of organisations taking up the initial programme offer employed five or fewer employees/volunteers.

Phase 2 of the Giving to Heritage programme has benefited from both the learning from the previous years of marketing and promotion activities and the existing branding, knowledge and positive reputation generated during Phase 1. Both The Heritage Alliance and Institute of Fundraising were able to approach former participants from Phase 1 of the programme and maximise the wealth of intermediary contacts able to promote workshops at a local level or within a particular subsector. There was also a learning in terms of the travel to learn patterns of Giving to Heritage participants who were found to be willing to travel often long distances to access training in London in particular.

The relative **success of the marketing and promotion of Phase 2 of Giving to Heritage is reflected in an increase in the average number of workshop places taken up** from 10.4 to 11.1 between Phase 1 and 2, reports of waiting lists for workshops and the cancellation of just one workshop in the last 12 months. Moreover, this success is again achieved despite 40% of participants (from both phases) of the programme working for organisations with five or fewer FTE employees.

The most effective ways to disseminate information on the Giving to Heritage offer have proved to be regular emails from the Institute of Fundraising and inclusion in the Heritage Alliance’s e-newsletter ‘Heritage Update’ to those actively engaged in The Heritage Alliance or Institute of Fundraising networks. Word of mouth also gained in influence as more people engaged with the programme relayed positive feedback to colleagues and/or associates. Whilst some stakeholders did highlight the issues in marketing towards smaller, volunteer-driven organisations (i.e. non Heritage Alliance and Institute of Fundraising members) and niche heritage sectors, (e.g. faith-based organisations including churches), the majority of stakeholders and programme participants completing a depth discussion believed that **the programme had been adequately marketed but acknowledged that improvements could always be made when marketing towards harder to reach audiences.**

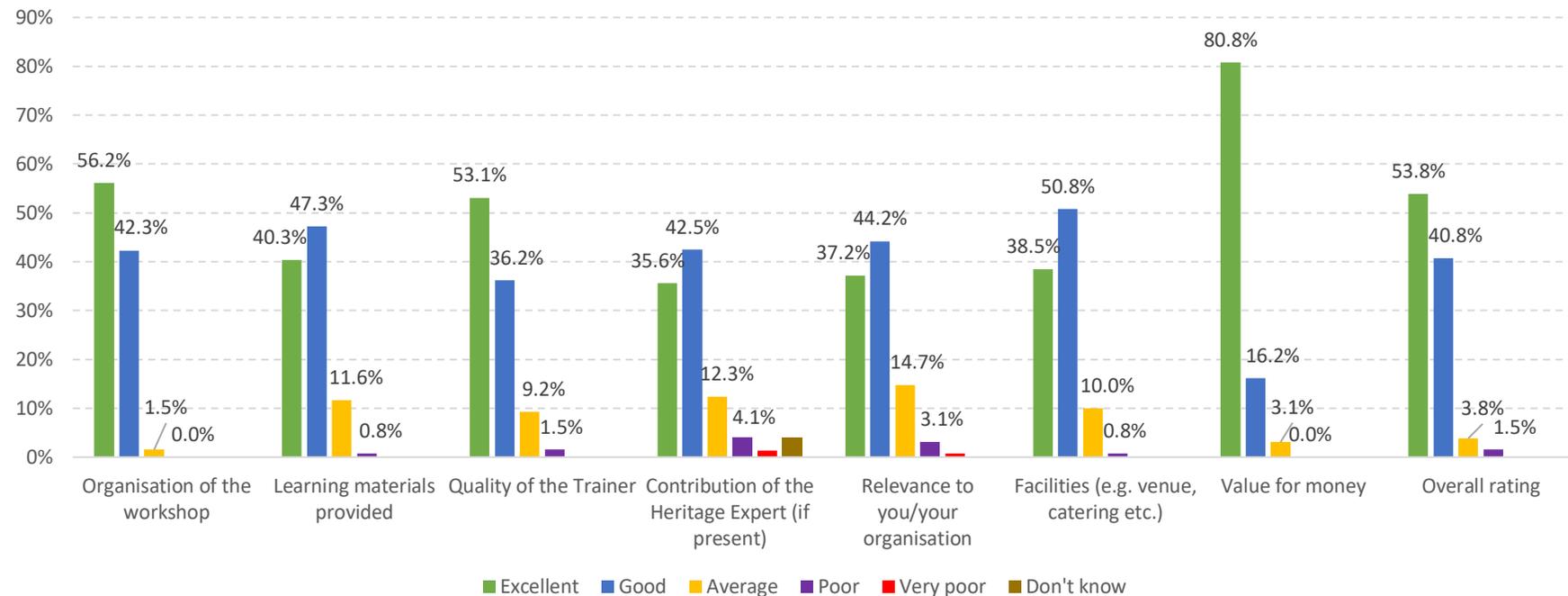
Workshops

A large majority of respondents (90%) to the participant survey had participated in at least one of the 148 workshops delivered through the Giving to Heritage programme. There was little variation between those accessing just workshops in just one or both phases of the programme.

The most popular workshops amongst respondents accessing only the first phase of the programme was 'Major Donor Fundraising for Heritage Organisations', attended by 33% of this cohort. The most popular workshop amongst respondents accessing only the extension or second phase of Giving to Heritage was the 'Legacy Fundraising for Heritage Organisations (Masterclass)' which was attended by 16% of respondents. The most popular workshop amongst respondents accessing both phases of the programme was the 'Creating a Case for Support for your Heritage Organisation', which was attended by 57% of respondents.

The Giving to Heritage workshops were consistently very well received throughout the programme with 95% of respondents rating the workshops overall as either 'excellent' or 'good'.

Workshop Ratings (n=131)



As with the previous evaluation, the cost of £20 was seen as a barrier by only a very small number of participants, and primarily volunteers who wanted to access multiple workshops and therefore had aggregated the direct and indirect costs (e.g. travel, accommodation and a day's annual leave). There was however **recognition of the stronger communication of the subsidised nature of the workshops** from those accessing support in Phase 2 which was reported to 'drive home' what was already widely viewed as an excellent offer.

Any negative ratings of the workshops were rare, relating to just four respondents overall including three people who accessed the programme for the first time in Phase 2. These were linked primarily to two of the Masterclass workshops and the mixed ability of Masterclass groups aimed primarily at more experienced fundraisers. This required the trainer to underpin the sessions with references to 'more basic' issues which were thought to result in a less effective delivery of the content when compared to other workshops experienced.

Overall however, **the feedback on the programme delivery was very positive with many of the issues raised by participants in the evaluation completed at the end of Phase 1 minimised or eliminated.** Examples include fewer negative comments on the venues used for training with the learning from Phase 1 and earlier planning reflected in what were largely seen as a range of interesting and accessible locations. Any issues relating to a lack of heritage-specific case studies or references were also much reduced as a result of updates to materials and the growing experience of the trainers in the subject area.

Similarly, the consultants raised few issues on course content, with **the Phase 2 delivery benefiting from the enhanced knowledge and experience of a core group of consultants with the ability to tailor delivery to the needs of a group and increasingly to the heritage sector** either with, or without the assistance of a Heritage Expert. Where participants highlighted the role of the Heritage Expert the views were very positive however, with an additional view or ability to link the discussion to a specific heritage example which participants could easily relate to widely appreciated.

Webinars

The Giving to Heritage programme will have broadcast 35 different webinars which largely reflect the content and messages provided through the workshop sessions by January 2018. The majority of the webinars have been delivered by the Heritage Experts responsible for the case study being presented or by the trainer responsible for a linked workshop, therefore maximising the value of their subject-area expertise. Just over one in five respondents (32 people or 21%) to the participant survey had viewed a webinar. However, and with reference to the value of the ongoing legacy offer for the programme, just one respondent (<1%) had viewed a webinar live compared to 31 people or 21% of all respondents viewing it on demand from a recording.

The webinars represent the main practical link between Giving to Heritage and other Catalyst programmes across the UK although the extent of use and access amongst this wider audience was not known. All Catalyst Leaders consulted viewed the webinars as a useful source of information and support to complement their own approaches to meeting shared outcomes and objectives and therefore promoted their availability through newsletters and links on their respective websites.

Mentoring

The Giving to Heritage mentoring scheme provided the opportunity, free of charge, for participants to benefit from a one-to-one mentoring relationship typically based on regular (e.g. monthly) face to face or telephone/Skype meetings complemented by email. **11 mentor-mentee pairs were active between March 2015/16 with participation dependent on involvement in a heritage project, the support of employers and involvement in or experience of fundraising.** Although mixed overall, the response to the scheme from mentors and mentees provided positive feedback on the training and impact on softer elements of mentoring (e.g. emotional support, career guidance, providing a sounding board and confidence building) of professional development.

Executive Coaching

The Executive Coaching offer provides a longer-term (e.g. 6-9 months) source of personalised support from an Institute of Fundraising consultant for heritage organisations tailored to individual and organisational needs. **Organisations accessing the offer stressed the value of being able to tailor the support based on an initial meeting between the Institute of Fundraising consultant to identify the support required to meet agreed fundraising objectives.** This process was well received overall and thought to be very useful in highlighting the need for wider support and capacity building as part of an organisation-wide approach to capacity building incorporating fundraising.

Heritage organisations accessing the Executive Coaching offer co-produced a range of training programmes in partnership with the Institute of Fundraising consultants including:

- One-to-one and group training based on the themes of many of the Giving to Heritage workshops pitched at the right level for the organisation;
- Ensuring future compliance with General Data Protection Regulation (GDPR) and the linked use of structured resources including dedicated fundraising staff, CRM systems and databases;
- Communicating the organisation's complex and multi-faceted offer more effectively to funders;
- Exploring in detail the correct fundraising strategies for the organisation;
- Training tailored to the role of a newly employed part time fundraiser and volunteer team;
- Training and information sessions for Boards and Trustees as part of a holistic, whole-organisation approach to fundraising; and
- Auditing fundraising processes.

In total the bespoke programme of consultancy typically accounts for six days of consultant time at a cost of £2,000 (out of £6,000 in total) to the heritage organisation. The discounted cost of the training was widely seen as excellent value for money, especially when compared to the 'market rates' for consultancy support which made the support affordable and accessible. Accessibility was further increased by the flexibility offered by Giving to Heritage to scale the offer to the needs and finances of heritage organisations.

Although it was too early in most cases for participants in the Executive Coaching offer to identify quantitative impacts linked to the support provided, most were able to identify the emerging benefits of the tailored programme of support. The common feature was the **recognition of the need for a coordinated approach to fundraising across the whole organisation which combines the skills, experience and capacity of staff, volunteers, Trustees and Board members.** As such, the value of the consultant presenting plans and/or discussing concerns with Trustees and Boards was confirmed with an external, professional voice often thought to validate the thoughts and aspirations of the staff members trying to progress fundraising in the organisation. Participants also recognised the value of widening and improving the fundraising expertise of the organisation to minimise risk and increase resilience.

“It has enabled us to discuss our fundraising internally, something we don't typically do despite being only a small team”

“We now have a plan to follow rather than just taking up opportunities as they arise”

Free, one hour Support and Consultancy Sessions

The free, one hour support and consultancy sessions have been taken up by 21 respondents (14%) to the participant survey. Participants highlighted a range of uses of the support available from consultants in these sessions and resultant outcomes which can be linked. Usually this involved answering specific questions linked to an organisation or bid-specific issues either prior to, but typically after a workshop session and could entail advice or ideas linked to fundraising or wider capacity building or resilience issues.

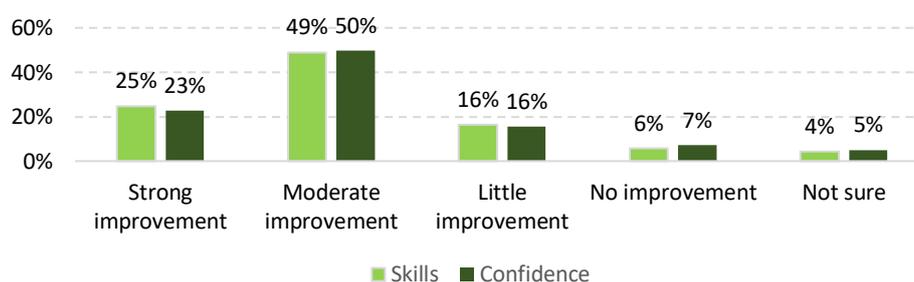
“It helped me to think in terms of strategy and to get input into what might be the most effective ways of fundraising for my organisation”

“With her advice in mind, I have rewritten our general appeals to trusts and foundations, improved the way we manage current grant makers and changed our strategy.”

Skills and confidence in fundraising from private and corporate sources

The Giving to Heritage programme has **successfully improved the skills and confidence in fundraising from private and corporate sources of the majority of people accessing the programme** with approximately three quarters of respondents reporting strong or moderate improvements in their skills and confidence as a result of accessing the Giving to Heritage programme.

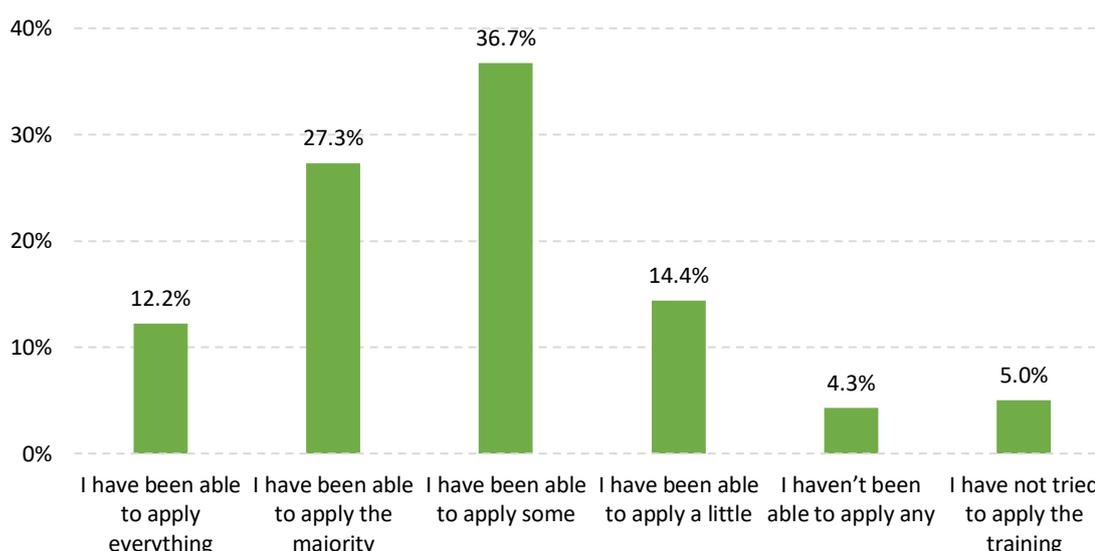
Improvement in skills and confidence in fundraising from private and corporate sources due to involvement in the Giving to Heritage programme (n=141)



Application of Giving to Heritage training

Approximately 40% of respondents to the participant survey have been able to use either all or the majority of the Giving to Heritage training in their role. A further 37% have, to date, been able to apply some of the training.

The extent to which training has been used in participants role (n=139)



Cited by 61% of respondents, **sharing the learning with colleagues, volunteers or board members** was by far the most frequently reported way in which the Giving to Heritage training has been used. This is important in recognising that **the reach and influence of the programme extends beyond those attending workshops or viewing webinars.**

A representative range of examples how the Giving to Heritage training has been used by participants in their role is provided below:

Examples of how the Giving to Heritage training has been used:

- Informing planning on a new high level giving scheme and a legacy campaign
- Developing an organisation-wide method of full cost recovery
- Developing a fundraising strategy
- Enhancing support for frontline heritage organisations in their project development, including fundraising as part of job role
- Improving financial planning
- Providing the confidence that organisations are on the right track
- Creating a case for support
- Developing an existing Trusts and Foundations stewardship scheme
- Developing a crowdfunding strategy
- Designing a legacy campaign

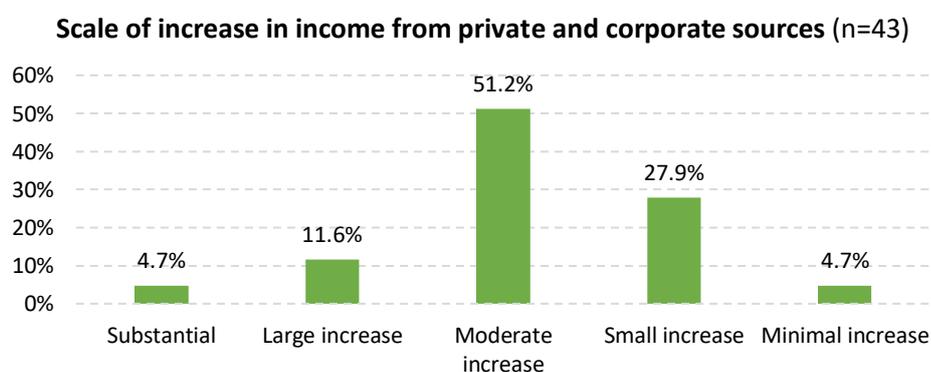
Approximately one third of respondents to the participant survey stated that they had experienced challenges in applying the training in their organisation. The major barriers to applying the learning were largely consistent with the Phase 1 evaluation in terms of organisational constraints, (e.g. obtaining buy-in or agreement to implement change) and time (e.g. as a result of limited volunteer capacity or more immediate pressures of delivery).

“Older members and trustees don't always welcome change, no matter how important or valuable it can be”

“The key difficulty is getting busy volunteer trustees to consider the strategies and implications of the on-going work on a fund-raising plan.”

Income generated from private and corporate sources

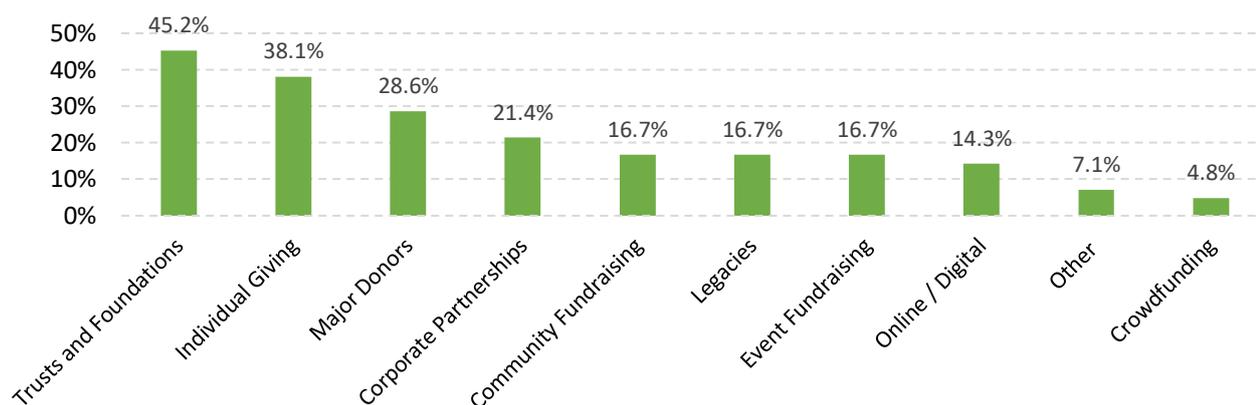
It is commonly agreed that **results in terms of increased income from private and corporate sources that can be attributed to programmes such as Giving to Heritage will take time to emerge.** This is especially the case for major donor schemes requiring extensive relationship development and legacy schemes. However, **just under one third of respondents (31%) to the latest participant survey stated that they had increased their income from private and corporate sources as a result of participating in the Giving to Heritage Programme.** Just under half (45%) of respondents reporting a rise in income from private and corporate sources identified ‘trusts and foundations’ as a source of this funding.



The completion of participant surveys at the end of Phase 1 and 2 of the Giving to Heritage programme provides an opportunity to assess the scale of income generated as a result of the programme from a large data set. The combined results of the two participant surveys provides financial data on income attributed to the Giving to Heritage programme from 43 organisations. **Figures reported range between £100 to £800,000 and total £3,135,880.**

Just under half (45%) of respondents reporting a rise in income from private and corporate sources identified 'Trusts and Foundations' as a source of this funding. The next most frequently cited sources of income were 'Individual Giving' and 'Major Donors' as stated by 38% and 29% respectively of respondents reporting a rise in income linked to Giving to Heritage.

Sources of new funding as a result of the Giving to Heritage programme (n=42)



Financial resilience

As a result of Giving to Heritage programme support 39% of 129 respondents to the participant survey stated that their heritage organisation is now **more financially resilient**.

Heritage offer management

As a result of Giving to Heritage programme support 45% of 130 respondents to the participant survey stated that their **heritage offer is better managed**.

Community

The **value of sharing experiences, good practice, information on funding opportunities and contacts amongst peers** facing similar challenges was a consistent feature of conversations with participants and the participant survey. Participants highlighted that these opportunities were relatively scarce given the pressures of work or lack of time and contacts amongst volunteers to identify networking opportunities. Crucially however it also confirms the willingness of heritage organisations to share good practice and information with just under half of respondents (48%) to the participant survey building upon these positive experiences by keeping in contact with their peers from the workshops.

Ongoing support needs

Consultation with sector stakeholders, fundraising consultants provided a consensus of opinion that **there is an ongoing need and demand for the support such as that offered through the Giving to Heritage**. This was confirmed through the participant survey with approximately two thirds (67%) of respondents stating that they had an interest in 'further fundraising training'.

The next group of further training aspirations are centred around support for communications activities including 'building a supporter base' and 'digital fundraising' as stated by 57% and 55% of respondents respectively.

Impact Summary

- This evaluation confirms the ongoing demand/rationale for, and crucially the impact of, the Giving to Heritage programme.
- The participant survey emphasises both the relevance and need for the support provided by the Giving to Heritage programme with over half of respondents reporting average or lower levels of skills and confidence in fundraising from private and corporate sources prior to accessing the programme.
- Giving to Heritage has successfully improved the skills and confidence in fundraising from private and corporate sources of the majority of people accessing the programme with approximately three quarters of respondents reporting strong or moderate improvements in their skills and confidence as a result of accessing the programme.
- The latest survey also provides an insight into the potential benefits to resilience and heritage management to be derived from impressive initial financial returns. Whilst a degree of caution should be applied to the figures attributed to the support from the programme, it is agreed that the amount generated as a result of Giving to Heritage will grow year-on-year as fundraising strategies are developed and implemented.

Conclusions

The Giving to Heritage programme has successfully achieved its stated aims and objectives or made significant progress towards longer-term targets. The evaluation has provided evidence of people working and volunteering for heritage organisations having developed skills and confidence in fundraising from private corporate sources, heritage organisations being more resilient as a result and heritage being better managed. Key conclusions underpinning this statement are summarised below.

Management and Delivery

1. The Giving to Heritage programme has benefited from effective and coordinated project management arrangements with both The Heritage Alliance and Institute of Fundraising working well in partnership to maximise the combined experience and skills of both partners.
2. The programme has evolved in response to learning from the first phase of delivery and the needs of the sector with updates to existing workshop content, the introduction of Masterclasses to meet demand for higher-level learning and the introduction of new workshops to inform fundraising activities through social investment.
3. Programme partners have continued to react quickly and flexibly to the needs of the sector and feedback from programme participants, working flexibly to adapt the programme as part of an active programme management approach.
4. The extension of the programme has continued to successfully deliver a range of training and support to a large number of people from a wide variety of heritage organisations across England, delivering 472 places in 42 workshops, 58 one-to-one and surgery sessions in addition to 10 Executive Coaching programmes.
5. The reach of the programme overall has been significant, delivering 148 workshops, 30 webinars and 197 support and consultancy one-to-ones. It has supported 1,282 unique individuals and 753 different organisations through individual, group and organisation-centred training.

6. The promotion and marketing of the Giving to Heritage offer has evolved and improved throughout its lifetime with The Heritage Alliance and Institute of Fundraising building on learning on what works in terms of reaching an often fragmented sector through direct and indirect approaches through shared responsibility for marketing and promotion.
7. The success of the programme is reflected in 95% of respondents to the participant survey rating them as either 'excellent' or 'good' and 81% rating the value for money as 'excellent'.
8. Any criticism of the programme has been minimal, relating to a handful of participants. Areas of learning however include issues around the marketing, delivery and targeting of Masterclasses to ensure that higher level training meets the needs and expectations of relevant individuals within the sector.

Impact

1. Results from participant surveys confirm the ongoing demand and rationale for the Giving to Heritage programme with expectations for further, sustainable impacts as improvements in the skills and confidence of the heritage sector to raise funds from private and corporate sources translate into organisational resilience and increased income from a breadth of funding sources.
2. The participant survey provides further evidence of both the relevance and need for the Giving to Heritage programme with over half of respondents reporting average or lower levels of skills and confidence in fundraising from private and corporate sources prior to accessing the programme. The participant survey also confirms improvements in this area with approximately three quarters of respondents reporting strong or moderate improvements in their skills and confidence as a result of accessing the Giving to Heritage programme.
3. Crucially the programme's impact will extend beyond those directly participating with approximately 40% of respondents to the participant survey able to use either all or the majority of the Giving to Heritage training and over 60% sharing the learning with colleagues, volunteers or board members.
4. Although some caution should be attached to the results, 31% of respondents to the participant survey stated that they had increased their income from private and corporate sources as a result of participating in the Giving to Heritage Programme with 16% of these reporting a 'substantial' or 'large' increase.
5. The impact of the programme in financial terms to date is significant. By combining and deduping the results of the last two surveys of Giving to Heritage participants, data from 43 organisations provides an estimate of approximately £3,135,880 gained from private and corporate sources which organisations attribute to the Giving to Heritage Programme.
6. The participant survey also illustrates the progress of the programmes to achieving its outcomes targets with 39% of respondents to the participant survey stating that their heritage organisation is now more financially resilient and 45% stating that their heritage offer is better managed as a result of the Giving to Heritage programme.
7. The value of peer to peer engagement supported through the programme is also widely recognised with Giving to Heritage participants appreciating the opportunity to share experiences, learn from others going through similar situations and gather useful information.

Recommendations

1. The participant survey and wider evaluation data provides a significant bank of evidence of both the impact of the Giving to Heritage programme and the ongoing need/value of sustaining similar provision for the programme partners and the HLF more widely.
2. The evaluation has highlighted the value of the component elements of the Giving to Heritage offer and importantly the merits of combining a menu of delivery options for the heritage sector which partners and funders alike can integrate into future programming.
3. The evaluation has reaffirmed the need for a holistic approach to fundraising. Given the scope for the lessons promoted through the programme to continue to be embedded and disseminated within organisations and the sector more widely, attempts should be made, where relevant, to encourage the ongoing implementation of learning as part of a whole-organisation approach supported by Trustees and Board members.
4. The webinars, hosted on YouTube and promoted through The Heritage Alliance and Institute of Fundraising websites, provide the main legacy vehicle for this programme. With reference to the ongoing need for support for the sector to raise funding from private and corporate sources, partners led by the HLF should explore the potential to expand upon the webinar offer either by replicating successful programme activities or designing legacy tools which build on the Giving to Heritage offer. Consultation raised the potential for both expanded sector forums and the translation of workshop content into 'interactive self-help guides' which heritage organisations can work through at their own pace combined with the webinar offer.
5. Utilising the contact details of programme participants, partners should approach Giving to Heritage participants to assess both ongoing progress, encourage participants to begin/continue to put the training into action and assess ongoing training needs.



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