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Executive Summary

Consilium Research and Consultancy (Consilium) was commissioned by The Heritage Alliance to deliver an evaluation of the Giving to Heritage Programme in December 2015. Consilium was recommissioned in December 2016 to undertake the final evaluation of the programme which focuses on the whole period of delivery since 2014. The methodology comprised a combination of desk research, consultation with key stakeholders involved in the management and delivery of the programme and consultation with organisations and individuals benefiting from the training offer.

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.

Giving to Heritage aims to boost the skills and confidence necessary to secure greater success in accessing funding from private and corporate sources and therefore the financial resilience of the independent heritage sector. The 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.

The initial two-year programme had aims to deliver learning opportunities across England and online across the UK. 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 Giving to Heritage programme aimed to meet the following aims and outcomes:

Programme Aims

- To deliver significant improvements in the way organisations in the independent heritage sector plan, monitor and communicate their activities;
- To empower individuals and organisations with greater skills and confidence so that they are able to implement effective fundraising strategies and techniques leading to greater access to funding from private sources and greater financial resilience; and
- To consolidate a greater sense of community across the heritage movement in England.

Programme 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.

Evaluation of the Giving to Heritage Programme
Evaluation of the Giving to Heritage Programme

The composition of the training offer has evolved throughout the programme in response to patterns in demand and feedback from participants. It has included a combination of face to face workshops, a series of masterclasses, surgeries by telephone, Skype or face to face, executive coaching for senior members of heritage organisations, mentoring pairings and a series of webinars. In total the Giving to Heritage programme has delivered 148 workshops attended by 1,101 individuals, 30 webinars and 197 support and consultancy sessions.

**Management and delivery**

The Giving to Heritage programme has benefited from effective and coordinated project management arrangements at both strategic and operational levels with both The Heritage Alliance and Institute of Fundraising working well in partnership to maximise the combined experience and skills of both partners. The partnership between Project Officers from both The Heritage Alliance and Institute of Fundraising has worked well, continuing the good relationship established with the longstanding Heritage Alliance Project Lead who moved on mid-way through the extension to the programme. Over the course of the programme management input from senior figures within The Heritage Alliance and Institute of Fundraising ensured consistency and provided guidance and resource to the programme delivery team.

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.

Programme partners, guided by the strategic input of sector stakeholders on the Steering Group, have continued to react quickly and flexibly to the needs of the sector and feedback from programme participants. Positive examples of active programme management include amending the approach to delivering the workshops on social investment to identify heritage organisations most likely to benefit from this relatively new approach, and adapting the cost of the Executive Coaching programme to meet the financial capacity of different heritage organisations.

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. Support has included 472 places in 43 workshops, 58 one-to-one and surgery sessions in addition to 10 Executive Coaching programmes. Partners have also learnt from the first phase of programme delivery to fine tune the marketing and promotion of the Giving to Heritage programme, building on the successes to date in terms of locations and venues and utilising partner and sector knowledge to cascade details of the programme offer. This is reflected in just one workshop being cancelled and waiting lists for many sessions.

The Giving to Heritage workshops have been consistently well received with 95% of respondents to the participant survey rating them as either ‘excellent’ or ‘good’. The value for money represented by the workshops was the major factor reflected by the participant survey with 81% of respondents rating this aspect as excellent - 25 percentage points higher than any other ratings area. These positive reactions were mirrored across the wider programme offer with excellent feedback from all but a small minority of participants.

Although still relating to a small minority of participants, the Masterclasses raised the most amount of constructive criticism. Whilst marketed as higher-level sessions, a small proportion of participants criticised what they found to be the ‘basic nature of the content’ which fell short of their expectations for the workshops. In reality, only a small proportion of the participants in the Masterclasses had accessed the ‘lower level’ sessions, and coupled with a desire to take advantage of the programme offer before it expired, many of the Masterclass sessions were stated to comprise of mixed ability groups which required the trainer to revisit some more basic areas.

*Evaluation of the Giving to Heritage Programme*
Notwithstanding these issues of participant self-selection, the introduction of Masterclasses is seen as a positive and progressive move to broaden the appeal of the programme generating lessons which programme partners will take forward into future delivery.

Impact

The results from the participant survey confirm the ongoing demand/rationale for, and crucially the impact of, the Giving to Heritage programme. Although it is acknowledged that the impact of the Giving to Heritage programme will first be visible in terms of improvements in the skills and confidence of the heritage sector to raise funds from private and corporate sources, the participant survey provides an insight into the potential benefits to resilience and heritage management to be derived from impressive initial financial returns.

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. 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.

Crucially in terms of using and disseminating the learning from the programme, 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 with over 60% sharing the learning with colleagues, volunteers or board members. The training has also been used to develop existing fundraising strategies and generate a greater focus on the planning, effectiveness and monitoring of fundraising activities.

As was the case across the whole of the Giving to Heritage programme, approximately one third of respondents had experienced challenges in applying the training in their organisation. These barriers most frequently related to organisational constraints linked to time and capacity, most notably within smaller organisations relying on volunteer support. Crucially however, Giving to Heritage participants also highlighted the issue of obtaining the necessary buy-in or agreement from colleagues, Boards or Trustees to implement the changes promoted through the programme.

Just under one third 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. Although a degree of caution should be attached to the level of attribution reported by respondents to the participant survey, 16% of these reported a ‘substantial’ or ‘large’ increase in income from private and corporate sources, primarily from trusts and foundations.

Combining and de-duping the results of the last two surveys of Giving to Heritage participants provides data from 43 organisations were able to estimate that they had raised a total of approximately £3,135,880 from private and corporate sources which could be directly attributed to the Giving to Heritage Programme. Whilst a degree of caution should be applied to the figures given different interpretations of attribution between respondents, 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.

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.

The value of peer to peer engagement is widely recognised within the sector with Giving to Heritage participants appreciating the opportunity to share experiences, learn from others going through similar situations and gather useful information.

*Evaluation of the Giving to Heritage Programme*
Crucially, participants highlighted both the value of the programme in inspiring others and promoting the need for a holistic or whole-organisation approach to fundraising, and the demand for further fundraising training to help sustain and grow the impact to date of the programme.

**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 43 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 de-duping 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.
1 Introduction

1.1 Consilium Research and Consultancy (Consilium) was commissioned by The Heritage Alliance to deliver an evaluation of the Giving to Heritage Programme in December 2015. Consilium was recommissioned in December 2016 to undertake the final evaluation of the programme which focuses on the whole period of delivery since 2014.

1.2 The period of programme activity up to June 2016 is referred to as Phase 1 in commentary or ‘GTH 1’ in tables and figures. Analysis of the programme supported from June 2016 is referred to as Phase 2 in commentary or ‘GTH 2’ in tables and figures. Unless stated (e.g. when aggregating the financial impact of the programme) beneficiary feedback on the delivery and impact of the programme is sourced from the latest survey. Where relevant, these results are differentiated by participants accessing the Giving to Heritage during Phase 1 or 2 only, or ‘both’ phases of the programme.

1.3 The Giving to Heritage programme had aims to boost the skills and confidence in the heritage sector necessary to secure greater success in accessing funding from private and corporate sources. This evaluation has a requirement to analyse the programme’s delivery against its stated aims and objectives and, in accordance with the programme’s commitment to the Heritage Lottery Fund (HLF), put the findings in the context of the independent heritage sector.

1.4 Working in partnership with the Institute of Fundraising, The Heritage Alliance remained the lead partner for the Giving to Heritage programme. The Heritage Alliance is the voice of the independent heritage sector in England, bringing together 110 independent heritage organisations which reach approximately 6.3 million members, volunteers, staff and trustees. It acts as an independent advocate for England’s heritage, sharing knowledge and expertise, lobbying for legislation and policies to ensure the benefits of heritage are realised by government, communities and individuals.

1.5 The Institute of Fundraising (IoF) is the professional membership body for UK fundraising. It supports fundraisers through leadership and representation; best practice and compliance; education and networking; and champions and promotes fundraising as a career choice. It has over 575 organisational members who raise more than £9 billion in income for good causes every year, and over 6,000 individual members.

1.6 The qualitative aspects of this report are necessarily based on the views of those interviewed and as such, are subjective. Every care has been taken to conduct this evaluation openly, thoroughly and professionally, to retain an objective stance, balance the opinions expressed and explore the justification for the comments made.

1.7 Carrying out this evaluation to date has required significant contribution of time and information from a number of people (Appendix 1), their assistance is much appreciated.

2 Methodology Summary

2.1 The evaluation methodology comprised a combination of desk research, consultation with key stakeholders involved in the management and delivery of the programme and consultation with organisations and individuals benefiting from the programme offer. It was designed to help The Heritage Alliance and Institute of Fundraising better understand the relative success of both the process and impact of delivering the Giving to Heritage programme. The approach used to inform the evaluation of the Giving to Heritage programme is summarised below.

A. Project Management
- Inception meeting
- Development and agreement of an Evaluation Plan
- Progress reporting

B. Desk Research
- Document Review
  - Review of programme documentation including marketing and training information
- Data Analysis
  - Programme data analysis
- Research Tool Design
  - Collaborative development of semi-structured stakeholder discussion guides, online participant survey, telephone questionnaires etc. with The Heritage Alliance and Institute of Fundraising

C. Fieldwork
- Heritage Organisations
  - Online survey of programme beneficiaries
  - Depth telephone interviews with organisations benefiting from the programme
  - Follow-up discussions with ten previous case study interviewees
  - Observation at two GTH workshops
- Stakeholders
  - Interviews with representatives from The Heritage Alliance, Institute of Fundraising (IoF) and other key organisations
  - Consultation with volunteer 'heritage experts' and trainers
  - Consultation programme leaders from other Catalyst programmes

D. Analysis and Reporting
- Analysis
  - Qualitative analysis of stakeholder and beneficiary consultation results
  - Quantitative analysis of programme impact data
- Reporting
  - Development of a minimum of five case studies
  - Draft and Final Reports
3  Context

The Catalyst Programme

3.1  The Giving to Heritage programme is funded by the HLF under the Catalyst initiative\(^2\). The Catalyst: Capacity building programmes form part of a broader partnership between HLF, the Department for Digital 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.

3.2  Catalyst: Umbrella grants were developed to offer eligible Umbrella bodies grants of between £100,000 and £500,000 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. £12,100 was allocated for the development phase and £487,700 for the delivery phase.

3.3  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.

3.4  The Catalyst Umbrella grants programme also funded eight other programmes, which have benefited from extensions of up to 18 months, delivering activity tailored to different geographical areas and heritage sectors managed by:

- Arts & Business Scotland;
- Cornwall County Council;
- Hampshire County Council Arts & Museums Service;
- Norfolk Museums & Archaeology Service;
- Northern Ireland Environment Link;
- The National Archives;
- The Prince’s Regeneration Trust; and
- Wales Voluntary Action Council (WCVA).

\(^2\) https://www.hlf.org.uk/looking-funding/our-grant-programmes/catalyst-umbrella

Evaluation of the Giving to Heritage Programme
3.5 The Umbrella grants are expected to achieve the following outcomes:

- **Outcomes for heritage**: with HLF investment, heritage will be better managed;
- **Outcomes for people**: with HLF investment, people will have developed skills; and
- **Outcomes for communities**: with HLF investment, your organisation will be more resilient.

**The Giving to Heritage Programme**

3.6 The Giving to Heritage programme aims to boost the skills and confidence necessary to secure greater success in accessing funding from private and corporate sources and therefore the financial resilience of the independent heritage sector. It has drawn upon the Heritage Alliance’s access to the heritage community and the Institute of Fundraising’s training expertise and access to wider fundraising community.

3.7 The programme is delivered through a partnership between The Heritage Alliance and the Institute of Fundraising with additional capacity provided in the extension period by Can Invest and the Community Shares Company to support a range of social investment fundraising training.

3.8 The first, two-year phase of the Giving to Heritage programme had aims to deliver up to 8,500 learning opportunities across England and online across the UK. The composition of the training offer evolved throughout the programme in response to patterns in demand and feedback from participants with the final programme offer incorporating:

- 99 face to face workshops[^3] on 12 topics delivered across the 9 English regions and hosted in heritage venues ([Appendix 2](#)) where possible;
- 50 surgeries (consultancy and support) by telephone, Skype or face to face where attendees access one to one guidance;
- Executive coaching for senior members of heritage organisations[^4,5];
- 24 mentoring pairings[^6]; and
- 30 webinars[^7].

[^3]: Day long seminars for up to 15 participants led by an Institute of Fundraising trainer and, in most cases, supported by a volunteer heritage fundraising expert. The workshops are charged at £20 to include a light lunch. [http://www.theheritagealliance.org.uk/gth/?page_id=201](http://www.theheritagealliance.org.uk/gth/?page_id=201)
[^4]: A bespoke training package for a specific organisation. A contribution towards the cost of the programme is double match funded by the HLF
[^5]: These replaced the Action Learning Sets proposed at the start of the programme
[^6]: 11 were delivered
[^7]: Live (involving up to 200 participants) and on demand online training sessions incorporating a discussion with the presenter and fellow participants. [http://www.theheritagealliance.org.uk/gth/?page_id=1398](http://www.theheritagealliance.org.uk/gth/?page_id=1398)
3.9 The second phase of the Giving to Heritage programme funded by the additional funding from the HLF had aims to deliver the following in the 12 months to the end of June 2017:

- 30 face to face workshops on a variety of fundraising subjects;
- 5 face to face workshops on social investment and community shares;
- A series of ‘masterclasses’ targeted at more experienced fundraisers;
- 10 webinars;
- 35 consultancy and support sessions; and
- 2 bespoke Executive Coaching opportunities.

3.10 The aims and outcomes of Giving to Heritage have remained consistent across the three years of the programme overall:

**Programme Aims**

- To deliver significant improvements in the way organisations in the independent heritage sector plan, monitor and communicate their activities.
- To empower individuals and organisations with greater skills and confidence so that they are able to implement effective fundraising strategies and techniques leading to greater access to funding from private sources and greater financial resilience.
- To consolidate a greater sense of community across the heritage movement in England.

**Programme 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.
- 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.
4 The Giving to Heritage Programme - Management and Delivery

Management arrangements

4.1 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.

4.2 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.

4.3 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.

4.4 The Heritage Alliance managed the initial marketing and promotion of Giving to Heritage, coordinating stakeholder management, marketing and communications and reporting to the HLF. It was 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.

4.5 **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 while Phase 2 was managed by an IoF Project Officer with senior management input from the Head of Professional Development.
4.6 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.

4.7 The content and scope of the workshops delivered in the last 12 months of the programme have been developed, redesigned and tweaked based on feedback from previous participants and the consultants delivering the sessions. The most appropriate trainers/consultants were commissioned by the Institute of Fundraising to update existing content and develop new workshop content (e.g. Masterclasses) based on their knowledge and experience of the topics.

4.8 A pool of consultants/trainers evolved throughout the course of the first phase of the Giving to Heritage programme to form a consistent, core group of around ten trainers capable of also helping to shape and deliver workshops throughout the 12 month extension from June 2016. The group of consultants/trainers offered both geographical coverage across England and the breadth of knowledge across different genres of fundraising with a growing knowledge of issues and heritage-specific case studies able to add value to the programme offer.

**Partnership working**

4.9 Project management arrangements are thought to have worked well overall, but also to have improved considerably in the latter half of the programme. The first year or so of partnership working was stated to have been punctuated by issues linked to different ways of working including the relative need for heritage-focused case studies in workshop learning materials, issues with data sharing and the impact of some strong personalities on day-to-day working. However, 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.

4.10 The improved nature of partnership working is epitomised by the close working relationship between key staff in the respective main organisations with the Heritage Project Officer from the Institute of Fundraising providing knowledge of heritage issues/delivery. The value of the partnership working between the two organisations was exemplified by the sharing of information and contacts for mutual benefit (e.g. The Heritage Alliance team working with Institute of Fundraising Policy team to consult with the Fundraising Regulator on proposed changes to legislation).
4.11 Wider partnership working linked to the wider Catalyst Programme is exemplified by the positive role played by the Giving to Heritage Project Officer in chairing meetings of the Leaders of the other eight Catalyst programmes. This role was praised in supporting an environment for Catalyst Leaders to share good practice and learning from the different approaches to delivering fundraising support and learning from Catalyst Programmes across the UK.

4.12 This has helped in terms of the joint promotion of the Giving to Heritage programme and, although meetings have lacked a degree of intensity in the last 12 months given the reduced programme of activities, the underlying and consistent partnership working between the Umbrella programmes has helped to maintain an efficiency of effort whilst broadening the offer available to heritage organisations across England.

Programme development and delivery

Initial Programme development

4.13 The initial training supported through Giving to Heritage commenced in June 2014 following an initial pre-delivery phase comprising initial marketing activity, development of the Giving to Heritage website\(^8\) 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\(^9\).

Programme delivery

4.14 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; and
- 30 webinars.

4.15 The programme offer has, however, 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 Sets\(^10\).

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\(^8\) [http://www.theheritagealliance.org.uk/gth/](http://www.theheritagealliance.org.uk/gth/)


\(^10\) Half day sessions for 12 people on topics chosen by the group at a cost of £20 per person
4.16 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.

4.17 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.

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

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

4.19 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. Indeed, the programme had to adapt its approach to marketing and targeting this offer given that it will not be right for all organisations. This was highlighted through an initial lack of demand for workshop places and feedback from some participants who found it largely irrelevant to their organisation. This situation was countered by the production of a webinar to raise awareness of the issues and a survey to gauge the relevance of the topic prior to the workshops. With hindsight, a longer run-in to this area, potentially incorporating media content to pre-empt the programme may have encouraged greater and more efficient take-up of this offer and is an area that both The Heritage Alliance and The Institute of Fundraising are continuing to explore further.

4.20 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.

4.21 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.

4.22 Key statistics summarising the entire Giving to Heritage programme offer and take-up to July 2017 are presented in Table 4.1 overleaf.
Table 4.1: Giving to Heritage - Key Statistics

<table>
<thead>
<tr>
<th>Activity</th>
<th>GTH 1</th>
<th>GTH 2</th>
<th>Total</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workshops delivered</td>
<td>105</td>
<td>43</td>
<td>148</td>
<td>Including in-house workshops</td>
</tr>
<tr>
<td>Webinars that have taken place</td>
<td>25</td>
<td>5</td>
<td>30</td>
<td>A total of 35 will be broadcast by January 2018</td>
</tr>
<tr>
<td>Total number of workshop places taken up</td>
<td>1,097</td>
<td>472</td>
<td>1,569</td>
<td>Counts places as opposed to individuals, includes in-house workshops</td>
</tr>
<tr>
<td>Total number of Support &amp; Consultancy sessions (one-to-ones)</td>
<td>139</td>
<td>58</td>
<td>197</td>
<td>This figure may rise with bookings being taken whilst budget remains</td>
</tr>
<tr>
<td>Total number of participants in both workshops and support &amp; consultancy sessions</td>
<td>1,234</td>
<td>530</td>
<td>1,764</td>
<td>Includes Workshops &amp; Support Sessions</td>
</tr>
<tr>
<td>Number Executive Coaching programmes undertaken</td>
<td>1,097</td>
<td>472</td>
<td>1,569</td>
<td>10 programmes with 9 organisations</td>
</tr>
<tr>
<td>Unique individuals engaged at Workshops</td>
<td>805</td>
<td>352</td>
<td>1,101</td>
<td></td>
</tr>
<tr>
<td>Unique individuals engaged in Support &amp; Consultancy (one-to-ones)</td>
<td>111</td>
<td>49</td>
<td>171</td>
<td></td>
</tr>
<tr>
<td>Total number of unique individuals engaged in Giving to Heritage (workshops &amp; support &amp; consultancy)</td>
<td>916</td>
<td>414</td>
<td>1,282</td>
<td></td>
</tr>
<tr>
<td>Unique organisations engaged at Workshops</td>
<td>551</td>
<td>280</td>
<td>731</td>
<td></td>
</tr>
<tr>
<td>Unique organisation engaged in Support &amp; Consultancy</td>
<td>99</td>
<td>45</td>
<td>144</td>
<td></td>
</tr>
<tr>
<td>Total organisations represented at Giving to Heritage opportunities</td>
<td>648</td>
<td>281</td>
<td>929</td>
<td></td>
</tr>
<tr>
<td>Mentoring pairings formed</td>
<td>11</td>
<td>-</td>
<td>11</td>
<td>- The formal mentoring programme did not run in the GTH extension</td>
</tr>
<tr>
<td>Participants not turning up to workshops</td>
<td>39</td>
<td>19</td>
<td>58</td>
<td></td>
</tr>
<tr>
<td>Participants unable to attend workshops due to workshop cancellation</td>
<td>116</td>
<td>4</td>
<td>120</td>
<td>- One social investment workshop was cancelled due to low interest with the offer re-worked into a webinar and consultancy session informed by organisational surveys to identify the relevance and value of the sessions.</td>
</tr>
</tbody>
</table>

Evaluation of the Giving to Heritage Programme
Programme legacy

4.23 The original legacy plans for the programme included ongoing signposting to the Giving to Heritage micro site which was to be maintained by The Heritage Alliance for five years after the end of the programme. The site will provide access to the Giving to Heritage webinars and signposting to resources including online networks and support available through the wider Catalyst umbrella programme.

4.24 Although there remains a requirement to maintain access to the Giving to Heritage website and webinars for five years following the end of the programme, other legacy arrangements in the absence of further continuation funding from HLF will need to be driven by core partners. At the time of writing plans are yet to be confirmed though the success of both the partnership between The Heritage Alliance and Institute of Fundraising and the model of delivery combining a variety of scalable offers provide scope to inform future partnership working.
5 Participant Survey - Profile of Respondents

5.1 The survey of programme participants delivered as part of the 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 in sections 6 and 7.

Participation in Giving to Heritage

5.2 Table 5.1 highlights the breakdown of respondents to the participant survey in terms of the timing of their participation in the Giving to Heritage programme. The largest group of respondents (44%) had first accessed the programme in Phase 2 (referred to in tables as GTH 2). Just over one third (34%) of respondents had only accessed the programme in Phase 1 (GTH 1) whilst 22% had accessed support from both phases of the programme.

<table>
<thead>
<tr>
<th>Table 5.1: Timing of participation in Giving to Heritage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No.</td>
</tr>
<tr>
<td>-----</td>
</tr>
<tr>
<td>Before June 2016 (GTH 1)</td>
</tr>
<tr>
<td>From June 2016 onwards (GTH 2)</td>
</tr>
<tr>
<td>Both before and after June 2016</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

Size of Respondents’ Organisations

5.3 Analysis of the size of respondents’ organisations in terms of employees and volunteers across the entire programme reveals that the largest group 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 work and/or volunteer for organisations supported by between 101 and 500 people (Table 5.2).

<table>
<thead>
<tr>
<th>Table 5.2: Size of respondents’ organisation by employees (FTE) and total including volunteers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Size bands</td>
</tr>
<tr>
<td>-------------</td>
</tr>
<tr>
<td>0</td>
</tr>
<tr>
<td>1-5</td>
</tr>
<tr>
<td>6-10</td>
</tr>
<tr>
<td>11-25</td>
</tr>
<tr>
<td>26-50</td>
</tr>
<tr>
<td>51-100</td>
</tr>
<tr>
<td>101-500</td>
</tr>
<tr>
<td>501-1,000</td>
</tr>
<tr>
<td>Over 1,000</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

Evaluation of the Giving to Heritage Programme
5.4 Table 5.2 above illustrates:

- The complexity in marketing the programme given the size of organisations in most need of fundraising support in the sector;
- An implied/perceived lack of capacity within these (smaller) organisations to dedicate staff time to fundraising; and
- The value and input of volunteers to the sector and linked requirement to deliver fundraising support tailored to volunteers.

5.5 Table 5.3 reveals that approximately four fifths of respondents accessing the Giving to Heritage programme have charitable status with no clear trends across the different phases of the programme.

<table>
<thead>
<tr>
<th></th>
<th>No.</th>
<th>%</th>
<th>No.</th>
<th>%</th>
<th>No.</th>
<th>%</th>
<th>No.</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>GTH 1</td>
<td>40</td>
<td>76.9</td>
<td>11</td>
<td>21.2</td>
<td>1</td>
<td>1.9</td>
<td>52</td>
<td>100.0</td>
</tr>
<tr>
<td>GTH 2</td>
<td>54</td>
<td>79.4</td>
<td>12</td>
<td>17.7</td>
<td>2</td>
<td>2.9</td>
<td>68</td>
<td>100.0</td>
</tr>
<tr>
<td>Both</td>
<td>26</td>
<td>81.3</td>
<td>6</td>
<td>18.8</td>
<td>0</td>
<td>0.0</td>
<td>32</td>
<td>100.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>120</td>
<td>79.0</td>
<td>29</td>
<td>19.1</td>
<td>3</td>
<td>2.0</td>
<td>152</td>
<td>100.0</td>
</tr>
</tbody>
</table>

5.6 The largest group of respondents (22%) participating in the Giving to Heritage programme stated that their organisation was based in London, followed by the South West (17%) and West Midlands (13%). In contrast, participants from the East of England and Yorkshire and the Humber accounted for 4% and 6% of respondents respectively (Table 5.4).

<table>
<thead>
<tr>
<th></th>
<th>No.</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>31</td>
<td>21.5</td>
</tr>
<tr>
<td>South West</td>
<td>25</td>
<td>17.4</td>
</tr>
<tr>
<td>West Midlands</td>
<td>18</td>
<td>12.5</td>
</tr>
<tr>
<td>South East</td>
<td>17</td>
<td>11.8</td>
</tr>
<tr>
<td>North West</td>
<td>13</td>
<td>9.0</td>
</tr>
<tr>
<td>East Midlands</td>
<td>11</td>
<td>7.6</td>
</tr>
<tr>
<td>North East</td>
<td>10</td>
<td>6.9</td>
</tr>
<tr>
<td>Yorkshire and the Humber</td>
<td>9</td>
<td>6.3</td>
</tr>
<tr>
<td>East of England</td>
<td>5</td>
<td>3.5</td>
</tr>
<tr>
<td>Scotland</td>
<td>3</td>
<td>2.1</td>
</tr>
<tr>
<td>Wales</td>
<td>2</td>
<td>1.4</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>144</td>
<td>100.0</td>
</tr>
</tbody>
</table>

5.7 The pattern of respondents’ organisational location by point of accessing the programme is illustrated in Figure 5.1 overleaf. Notable trends include the sharp rise in respondents from London and the East of England accessing the programme only in GTH 2 compared to only in GTH 1 of 20 and 13 percentage points respectively.
Approximately half of respondents (50%) 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’ (Table 5.5).

Table 5.5: Respondents by organisation’s area of heritage (n=153)

<table>
<thead>
<tr>
<th>Area of Heritage</th>
<th>GTH 1</th>
<th>GTH 2</th>
<th>Both</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No.</td>
<td>%</td>
<td>No.</td>
<td>%</td>
</tr>
<tr>
<td>Built environment</td>
<td>22</td>
<td>42.3</td>
<td>32</td>
<td>47.1</td>
</tr>
<tr>
<td>Community and local history</td>
<td>27</td>
<td>51.9</td>
<td>29</td>
<td>42.7</td>
</tr>
<tr>
<td>Museums and galleries</td>
<td>20</td>
<td>38.5</td>
<td>29</td>
<td>42.7</td>
</tr>
<tr>
<td>Archives and libraries</td>
<td>14</td>
<td>26.9</td>
<td>17</td>
<td>25.0</td>
</tr>
<tr>
<td>Industrial, maritime and transport</td>
<td>12</td>
<td>23.1</td>
<td>22</td>
<td>32.4</td>
</tr>
<tr>
<td>Natural heritage</td>
<td>15</td>
<td>28.9</td>
<td>20</td>
<td>29.4</td>
</tr>
<tr>
<td>Archaeology</td>
<td>9</td>
<td>17.3</td>
<td>17</td>
<td>25.0</td>
</tr>
<tr>
<td>Public parks</td>
<td>6</td>
<td>11.5</td>
<td>8</td>
<td>11.8</td>
</tr>
<tr>
<td>Other</td>
<td>11</td>
<td>21.2</td>
<td>4</td>
<td>5.9</td>
</tr>
</tbody>
</table>
6 The Giving to Heritage Programme - Delivery

Marketing and promotion activities

6.1 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.

6.2 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.

6.3 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.

6.4 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 (Table 6.1).

<table>
<thead>
<tr>
<th>Table 6.1: How participants received information about the Giving to Heritage Programme (n=152)</th>
<th>GTH 1</th>
<th>GTH 2</th>
<th>Both</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No.</td>
<td>%</td>
<td>No.</td>
<td>%</td>
</tr>
<tr>
<td>Communication from the Institute of Fundraising</td>
<td>30</td>
<td>57.7</td>
<td>37</td>
<td>55.2</td>
</tr>
<tr>
<td>Heritage Alliance’s e-newsletter ‘Heritage Update’</td>
<td>32</td>
<td>61.5</td>
<td>29</td>
<td>43.3</td>
</tr>
<tr>
<td>Other communication from the Heritage Alliance</td>
<td>19</td>
<td>36.5</td>
<td>6</td>
<td>9.0</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>8</td>
<td>15.4</td>
<td>19</td>
<td>28.4</td>
</tr>
<tr>
<td>Other</td>
<td>7</td>
<td>13.5</td>
<td>10</td>
<td>14.9</td>
</tr>
<tr>
<td>Communication from another network or organisation</td>
<td>6</td>
<td>11.5</td>
<td>6</td>
<td>9.0</td>
</tr>
<tr>
<td>Social media</td>
<td>4</td>
<td>7.7</td>
<td>2</td>
<td>3.0</td>
</tr>
</tbody>
</table>

Evaluation of the Giving to Heritage Programme
6.5 In addition to illustrating the benefits of utilising the contact details of Phase 1 participants to promote the Phase 2 offer, Table 6.1 illustrates the growing influence of word of mouth as more people engaged with the programme and relayed positive feedback to colleagues and/or associates.

6.6 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). However, the majority of stakeholders (i.e. steering group members, Institute of Fundraising consultants and Heritage Experts) 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. This included the effective use of social media and direct communications (e.g. emails and newsletters) from The Heritage Alliance and the Institute of Fundraising in addition to signposting from area and/or sector organisations (e.g. AIM).

**Workshops**

6.7 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.

- Of the 40 GTH 1 respondents stating which workshops they had attended, 1 had accessed 10 workshops, 1 had accessed 9 workshops and 3 had accessed 8 workshops. Just one respondent had attended just one workshop.

- Of the 62 GTH 2 respondents stating which workshops they had attended, 1 had accessed 9 workshops, 1 had accessed 4 workshops whilst 46 respondents (74%) had attended just one workshop.

- Of the 28 respondents accessing both phases of the programme and stating which workshops they had attended, 1 had accessed 6 workshops, 2 had accessed 5 workshops whilst 21 respondents (75%) had attended just one workshop.

6.8 The most popular workshops amongst respondents accessing only GTH 1 was ‘Major Donor Fundraising for Heritage Organisations’, attended by 33% of this cohort (Table A1). The most popular workshop amongst respondents accessing only GTH 2 was the ‘Legacy Fundraising for Heritage Organisations (Masterclass)’ which was attended by 16% of respondents (Table A2). 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 (Table A3).
6.9 The Giving to Heritage workshops have been consistently well received across the entire programme with 95% of respondents rating them as either ‘excellent’ or ‘good’ (Table A4). The ‘value for money’ represented by the workshops has been the consistent and dominant factor reflected in this and previous participant surveys, with 81% of respondents rating this aspect as excellent - 25 percentage points higher than the next ratings area linked to the ‘organisation of the workshop’ (Figure 6.1).

**Figure 6.1: Workshop Ratings (n=131)**

![Bar chart showing workshop ratings](image)

6.10 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.
6.11 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 - ‘Corporate Partnerships for Heritage Organisations (Masterclass)’ and ‘Major Donor Fundraising for Heritage Organisations (Masterclass)’.

“Although the workshop was described as a masterclass, I didn't feel like it was as advanced as I expected or as would be helpful given my experience and the size of my organisation.”

6.12 These ratings were reflected in discussions with programme participants with issues raised including 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.

6.13 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 locations11. Any issues relating 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.

6.14 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

6.15 At the time of writing the Giving to Heritage programme had delivered 30 webinars which largely reflected the content and messages provided through the workshop sessions. There are plans to deliver a further five webinars 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.

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11 A full list of Phase 2 workshops and venues used by the Giving to Heritage programme is provided in Appendix 2.

Evaluation of the Giving to Heritage Programme
6.16 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.

6.17 As was the case with the previous participant survey, the most popular webinar (accessed by eight respondents or 30%) was ‘Fundraising In The Community: Hastings Pier - Community Shares’ (Table A5). The next most popular webinars were ‘Calling All Angels - The Case For Support At St Nicholas Chapel’ which was viewed by seven people followed by three webinars each viewed by six people - ‘Successful Event Fundraising’, ‘Making The Most Of Digital For Heritage Fundraising’ and ‘Measuring & Communicating The Impact Of Heritage Organisations For Funders’.

6.18 Feedback from the small number of Giving to Heritage participants consulted during the in-depth follow-up interviews who had accessed the webinars was positive in terms of the quality, content and accessibility of the resource. Most participants consulted however were yet to utilise the webinars but signalled an intention to access them in the future either to explore new topics or refresh existing knowledge given the end of the current programme of workshops.

6.19 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.

Executive Coaching

6.20 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.

6.21 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 although in one example the time taken for the consultant to fully grasp the complex organisational priorities and activities was thought to reduce the time available for practical support. This process was, however, also 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.

“It’s been about us”
Heritage organisations consulted reported accessing the Executive Coaching offer for a variety of reasons, including:

- As a method of overcoming access issues associated with the wider Giving to Heritage workshop sessions when based in a rural area with poor transport links;
- To provide new ideas and/or approaches to support fundraising efforts;
- To explore options to establish a constituted group to support a HLF bid;
- To respond to challenging funding conditions including diminishing local authority support and the forthcoming loss of EU funding; and
- To build on previous support accessed from the Giving to Heritage programme including workshops and the free, one-to-one hour of consultancy.

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;
- General capacity building;
- 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.

“The flexibility in price meant the Board were willing to provide £1,500 for the Executive Coaching rather than £2,000”
Although recognising the added value of the Institute of Fundraising consultant interpreting (often very similar) information which participants recognise from the workshops. There were also some minor questions raised around the efficiency of the consultant travelling long distances to meet for support sessions although the value of direct contact on a one-to-one or group basis was universally recognised.

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”

“I’d never written a case for support before, it was useful in widening opportunities from just Trusts and Foundations and getting our message out there”

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

Those consulted were also able to illustrate how the Executive Coaching offer had been used to add value to other support from the HLF in particular. In one instance the organisation had been able to put the support offered by the Institute of Fundraising consultant into practice through the CRM system and fundraising database acquired with HLF support.

“The programme has been a game changer”

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.
Examples of the issues discussed and benefits derived from the sessions are reflected in the following verbatim quotations taken from the participant survey:

“I have had two sessions with different professionals. I found both extremely useful. 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 and also to follow up in more on points raised by specific workshops.”

“It helped develop our major donor strategy”

“invaluable and friendly advice, good mentoring, gave me empowerment and brought on success”

“A considerable insight into problems and methods. It certainly helped us towards an HLF Start-up grant and, with a later training day, has given me something substantial to work at.”

“The person I talked to was incredibly helpful, really generous with her time and advice. 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.”

“Very helpful insights into fundraising challenges specific to our organisation and some context helpful to understanding the bigger picture.”

“It has helped to inform the delivery of our legacy strategy (although it’s too early to say if there has been a clear financial benefit)”

“Enabled us to start to create a cohesive fundraising strategy.”

“Benefit to organisation has been in commissioning reviews of both capital and revenue fundraising strategies”

“Insight into planning a professional fundraising campaign”

“Given us lots of new ideas to try out”

Participants consulted in follow-up telephone discussions varied in their knowledge and take-up of the free one hour support and consultancy sessions but were in consensus on the value of the offer. Discussions did highlight a range of potential barriers to people knowing about the offer but failing to take up the offer including lacking a critical mass of issues to warrant a session, the workshops answering all their immediate queries or knowledge that they or their organisation lacks the capacity or authority to put the advice into practice.

Summary

The Giving to Heritage programme has benefited from effective and coordinated project management arrangements at both strategic and operational levels with both The Heritage Alliance and Institute of Fundraising working well in partnership to maximise the combined experience and skills of both partners. The partnership between Project Officers from both The Heritage Alliance and Institute of Fundraising has worked well, continuing the good relationship established with the longstanding Heritage Alliance Project Lead who moved on mid-way through the extension to the programme.
6.32 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.

6.33 Programme partners, guided by the strategic input of sector stakeholders on the Steering Group, have continued to react quickly and flexibly to the needs of the sector and feedback from programme participants. Positive examples of active programme management include amending the approach to delivering the workshops on social investment to identify heritage organisations most likely to benefit from this relatively new approach, and adapting the cost of the Executive Coaching programme to meet the financial capacity of different heritage organisations.

6.34 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 comprising 472 places in 43 workshops, 58 one-to-one and surgery sessions in addition to 10 Executive Coaching programmes.

6.35 Partners have also learnt from the first phase of programme delivery to fine tune the marketing and promotion of the Giving to Heritage programme, building on the successes from delivery to date in terms of locations and venues and utilising partner and sector knowledge to cascade details of the programme offer. This is reflected in just one workshop being cancelled and waiting lists for many sessions.

6.36 The Giving to Heritage workshops have been consistently well received with 95% of respondents to the participant survey rating them as either ‘excellent’ or ‘good’. The value for money represented by the workshops was the major factor reflected by the participant survey with 81% of respondents rating this aspect as excellent - 25 percentage points higher than any other ratings area. These positive reactions were mirrored across the wider programme offer with excellent feedback from all but a small minority of participants in the Executive Coaching, one-to-one consultancy sessions and webinars.

6.37 Although still relating to a small minority of participants, the Masterclasses raised the most amount of constructive criticism. Whilst marketed as higher-level sessions, a small proportion of participants criticised what they found to be the ‘basic nature of the content’ which fell short of their expectations for the workshops. In reality, only a small proportion of the participants in the Masterclasses had accessed the ‘lower level’ sessions, and coupled with a desire to take advantage of the programme offer before it expired, many of the Masterclass sessions were stated to comprise of mixed ability groups which required the trainer to revisit some more basic areas. Notwithstanding these issues of participant self-selection, the introduction of Masterclasses is seen as a positive and progressive move to broaden the appeal of the programme generating lessons which programme partners will take forward into future delivery.
7  The Giving to Heritage Programme - Impact

7.1 This section of the report provides analysis of the impact of the Giving to Heritage programme in terms of changes to participants’ skills and confidence in fundraising from private and corporate sources, the application of the training and the results in terms of income generation, resilience and management of the heritage offer.

Skills in fundraising from private and corporate sources

7.2 Over half (56%) of respondents to the participant survey rated their own skills in fundraising as average or worse before benefiting from the programme, emphasising both the relevance and need for the support provided.

**Figure 7.1: Skills levels prior to accessing the Giving to Heritage programme (n=141)**

7.3 Figure 7.2 highlights the impact of the Giving to Heritage programme in improving the fundraising skills of participants with just under three quarters of respondents (74%) reporting strong or moderate improvements in their skills as a result of accessing the Giving to Heritage programme.

**Figure 7.2: Improvement in skills in fundraising from private and corporate sources due to involvement in the Giving to Heritage programme (n=141)**
Confidence in fundraising from private and corporate sources

7.4 Over three fifths (61%) of respondents to the participant survey rated their own confidence in fundraising as average or worse before benefiting from the programme.

**Figure 7.3: Confidence levels prior to accessing the Giving to Heritage programme (n=141)**

7.5 Figure 7.4 highlights the impact of the Giving to Heritage programme in improving the confidence of participants to raise funds from private and corporate sources with a little under three quarters of respondents (72%) reporting strong or moderate improvements in their confidence as a result of accessing the Giving to Heritage programme.

**Figure 7.4: Improvement in 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

7.6 The participant survey reveals that the Giving to Heritage programme has been effecting organisational change and personal development with approximately 40% of respondents stating that they have been able to use either all or the majority of the training or support in their role. A further 37% have, to date, been able to apply some of the training although to 4% who haven’t been able to apply any and 5% who have not tried (Figure 7.5).

Figure 7.5: The extent to which training has been used in participants role (n=139)

7.7 The most frequently cited way in which the Giving to Heritage support has been used is in ‘sharing the learning with colleagues, volunteers or board members’, as stated by 61% of respondents (Figure 5.6). This is important in recognising that the reach and influence of the programme extends beyond those attending workshops or viewing webinars. Indeed, discussions with both stakeholder and participants stressed the value of the knowledge and support provided by the programme transferring between staff and/volunteers with a direct role in fundraising and wider Trustees or Board members as part of a holistic approach to effective fundraising practice.

7.8 The next most frequently cited ways in which the training has been used by participants and their organisations include ‘developing an existing fundraising strategy’ and ‘generating a greater focus on the planning, effectiveness and monitoring of fundraising’, as stated by 33% of respondents. A further 30% of respondents had ‘developed an existing case for support’ (Figure 7.6).
**Figure 7.6: Ways training has been used (n=135)**

- I/we have established a new annual giving campaign: 2.4%
- I/we have developed new dedicated fundraising posts: 4.1%
- I/we have maintained or increased the level of resources allocated to fundraising: 8.1%
- I/we have established a new friends/membership scheme: 8.1%
- I/we have asked a private individual for support (who we have not previously approached): 10.6%
- I/we have established a new legacy campaign: 13.0%
- I/we have approached a new source(s) of private or corporate funding: 14.6%
- I/we have created a new case for support: 17.9%
- I/we have created a new fundraising strategy: 22.0%
- I/we have made the case internally for more fundraising activity: 24.4%
- I/we have applied for funding from a Trust or Foundation which we have not approached before: 28.5%
- I/we have developed our existing case for support: 30.1%
- I/we have generated a greater focus on the planning, effectiveness and monitoring of fundraising: 32.5%
- I/we have developed our existing fundraising strategy: 32.5%
- I have shared the learning with my colleagues/fellow volunteers and/or board members: 61.0%

*Evaluation of the Giving to Heritage Programme*
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

**Challenges to applying learning**

Approximately one third (33%) 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). A small number of participants also disclosed some minor issues in terms of the limited added value of the training to themselves and/or their organisation given their existing level of knowledge and difficulty in transferring the learning from non-heritage examples offered in the workshops.

Quotations reflecting the challenges expressed by participants are provided below:

**Time limitations**

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

“It is always difficult to change the attitude of an organisation, especially when staff are already very busy.”

“I felt, following training that we needed to work more on defining our case and looking at our actual heritage offer”

“We need to recruit further trustees for fundraising. Our part time Project Organiser has to co-ordinate all the fundraising for very considerable sums. We do not have the capacity to manage a Friends Group, which could be used to build up Legacy funding.”
Organisational constraints

“I have found it difficult to communicate the need for our organisation to have a stronger vision and mission statements”

“It is difficult to integrate a holistic understanding and appreciation for fundraising in a historic place such as the cathedral”

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

“Small scale organisation without enough capacity”

“Lack of resources, more pressing priorities”

“Members of team found it difficult to move from an expectation that someone else would deal with raising money to being expected to understand and gain these skills for themselves”

“It is sometimes difficult to implement new and beneficial insight and training in areas where collaboration is needed and where other departments have conflicting targets and priorities.”

Requiring higher level training or more specific training tailored to an organisation or project

“The advice given was not appropriate for either my position in <organisation name> or the organisation’s model of practice.”

“In the two workshops I attended the training provided was at a very basic level, so within our organisation these skills were already being used.”

7.13 The suggested additional areas of support from participants that would be useful when applying the training to their roles focused to a large degree on specific advice or guidance when tailoring, implementing or evaluating fundraising actions in order to achieve more effective results. Some ideas reflect a potential need for more repeat or targeted marketing to more effectively embed the Giving to Heritage offer within the sector, (e.g. requests for one-to-one support or mentoring). However, other suggestions highlighted in the form of anonymised quotations taken from the survey could be taken forward or used in future training to help maintain buy-in and encourage sustainable results.

“Listening to an independent fundraising `mentor’/ adviser is sometimes more readily accepted, than the same advice from within the organisation.”

“Talking to people about how to change the strategy of an organisation internally. I found the one-to-one conversation particularly useful - normally I am too shy to ask questions in front of larger audiences.”

“Guidance/feedback during the development of case for support to ensure you are following the training received”

“Some administration support to set up and manage the fundraising database would help”

“If I had got on the programme sooner I think the 1:1 coaching opportunities would have been really helpful to develop some ideas further”
“A course on how to work with decision makers who are not keen on making changes”
“A continuation of the existing set of courses so that new people could attend them”
“Something geared towards better use of religious buildings, unlocking the heritage in your church, etc.”
“The opportunity to have short small seminar style sessions with the opportunity to discuss your own challenges”
“Practical support, such as a follow up workshop, to see how we’ve got on since the training, what problems we’ve encountered and how we could think to handle them”

Income generated from private and corporate sources

7.14 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.

7.15 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 (e.g. Trusts & Foundations, Corporate, Individual Giving, Online, Major Donors, Legacies, Events and Community) as a result of participating in the Giving to Heritage Programme. This figure is consistent with that reported in the previous evaluation report undertaken at the end of Phase 1 of Giving to Heritage.

7.16 16% of respondents stating that they had increased their income from private and corporate sources (this equates to 9% of all respondents to the participant survey) reported a ‘substantial’ or ‘large’ increase in income as a result of Giving to Heritage support. Just over half of respondents (51%) also reported a ‘moderate’ increase whilst just over one quarter (28%) reported a ‘small’ increase (Figure 7.7).

Figure 7.7: Scale of increase in income from private and corporate sources (n=43)

7.17 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 (Figure 7.8). 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.
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.**

Major successes reported through the latest participant survey alone attributed, to varying degrees, to the Giving to Heritage programme included:

- £50,000 for a new station canopy from an Environmental Trust;
- HLF Grants of £11,000 and £40,000;
- £14,000 from Grant Making Trusts;
- £40,000 heritage Lottery fund our history application;
- Major donors doubling member donor pledges to £13,000;
- Maximising donations towards our crowdfunding campaign which has hit its target of £10,000; and
- £90,000 from the LIBOR fund.

Wider impacts and outcomes linked to participation in the Giving to Heritage programme identified through the latest participant survey include:

- 39% of 129 respondents stating that their heritage organisation is now more financially resilient; and
- 45% of 130 respondents stating that their heritage offer is better managed.

**Figure 7.8: Sources of new funding as a result of the Giving to Heritage programme (n=42)**

- Trusts and Foundations: 45.2%
- Individual Giving: 38.1%
- Major Donors: 28.6%
- Corporate Partnerships: 21.4%
- Community Fundraising: 16.7%
- Legacies: 16.7%
- Event Fundraising: 16.7%
- Online / Digital: 14.3%
- Other: 7.1%
- Crowdfunding: 4.8%
Peer to Peer Support

7.21 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.

7.22 Respondents highlighted a variety of ways in which these contacts had been used to support fundraising activities headed by the sharing of ideas, exchanging details of funding opportunities or events, discussing potential for joint projects or just bouncing ideas off each other. Specific examples of topics and issues discussed between Giving to Heritage participants either in the workshop setting or afterwards included details of different CRM systems and web platforms, the hiring of co-participants as associates, wider training opportunities or simply sharing details of similar heritage projects.

7.23 Importantly in terms of informing future programming, the consensus amongst stakeholders including other Catalyst programmes and participants is that for peer to peer support to be sustainable and effective, it needs grow organically rather than being driven by a funder or delivery partner. Whilst this may be easier to encourage and sustain within the cohort approaches utilised by other Catalyst programmes\(^{12}\) where a series of training sessions attended by the same group from a smaller geographical areas encourages stronger relationships, the value of peer to peer networking should not be underestimated within more diverse programmes such as Giving to Heritage.

\(^{12}\) See Inspiring a Culture of Philanthropy from Hampshire Cultural Trust for an example of a cohort approach (http://www.fundraisingportal.org.uk/about-us)
Most important things learnt from the Giving to Heritage programme

7.24 Participants highlighted a large number of important things which they have learnt from the Giving to Heritage Programme. These included the value of training in fundraising to inspire others in the organisation, the need for a holistic or whole-organisation approach to fundraising, the value of a solid, concise and targeted Case for Support and the need for a coherent fundraising strategy to coordinate activities according to a planned rather than opportunistic strategy.

7.25 A selection of the most frequently cited learning, advice and tips provided by respondents is provided below:

- Heritage charities are increasingly growing their fundraising potential, with more people wishing to support them. There are many opportunities not to be missed;
- Not to be disheartened or demotivated by setbacks and to keep on going;
- Developing a strong, interesting hook to a fundraising application which is engaging and memorable;
- A fully structured approach is essential if you are to focus on your organisation’s strengths and weakness;
- A need to devote significant time and energy into fundraising strategy and to maintain that before and during projects;
- To be confident and know what you are asking for and who you are asking for it;
- Not to view your organisation as just heritage;
- Engage with other likeminded people to exchange and develop ideas with;
- To be realistic about what can be achieved without additional resources such as a professional fundraiser;
- To not be afraid to shout about legacies and bring the subject up;
- Creating strong and consistent messaging - sharing your organisation’s vision and passion;
- When and how to use Crowdfunding as part of a fundraising strategy;
- That there is a lot of training and resources out there that we can use, but don’t;
- Knowledge of how funders assess bids and what they are looking for; and
- Developing a customised approach to individual grant giving organisations.
Ongoing support needs

7.26 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’ (Figure 7.8). 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.

Figure 7.8: Interest in additional training (n=121)

Summary

7.27 The latest results from the participant survey continue to confirm the ongoing demand/rationale for, and crucially the impact of, the Giving to Heritage programme. Although it is acknowledged that the impact of the Giving to Heritage programme will first be visible in terms of improvements in the skills and confidence of the heritage sector to raise funds from private and corporate sources, this latest survey provides an insight into the potential benefits to resilience and heritage management to be derived from impressive initial financial returns.

7.28 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. 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.
7.29 Crucially in terms of using and disseminating the learning from the programme, 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 with over 60% sharing the learning with colleagues, volunteers or board members. The training has also been used to develop existing fundraising strategies and generate a greater focus on the planning, effectiveness and monitoring of fundraising activities.

7.30 As was the case across the whole of the Giving to Heritage programme, approximately one third of respondents had experienced challenges in applying the training in their organisation. These barriers most frequently related to organisational constraints linked to time and capacity, most notably within smaller organisations relying on volunteer support. Crucially however, Giving to Heritage participants also highlighted the issue of obtaining the necessary buy-in or agreement from colleagues, Boards or Trustees to implement the changes promoted through the programme.

7.31 Just under one third of respondents (31%) 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. Although a degree of caution should be attached to the level of attribution reported by respondents to the participant survey, 16% of these reported a ‘substantial’ or ‘large’ increase in income from private and corporate sources, primarily from trusts and foundations.

7.32 Combining and de-duping the results of the last two surveys of Giving to Heritage participants provides data from 43 organisations were able to estimate that they had raised a total of approximately £3,135,880 from private and corporate sources which could be directly attributed to the Giving to Heritage Programme. Whilst a degree of caution should be applied to the figures given different interpretations of attribution between respondents, 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.

7.33 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.

7.34 The value of peer to peer engagement is widely recognised within the sector with Giving to Heritage participants appreciating the opportunity to share experiences, learn from others going through similar situations and gather useful information. Indeed, just under half of respondents to the participant survey had built upon these positive experiences from the Giving to Heritage workshops in particular by keeping in touch with contacts made through the programme.
7.35 Crucially, participants highlighted both the value of the programme in **inspiring others and exalting the need for a holistic or whole-organisation approach** to fundraising, and the demand for further fundraising training to help sustain and grow the impact to date of the programme.
8 Conclusions and Recommendations

Conclusions

8.1 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 43 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’.

Evaluation of the Giving to Heritage Programme
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.
8.2 A number of recommendations emanating from the evaluation are presented below. Given the stage of the programme they focus on legacy issues related to the programme directly and future activities of The Heritage Alliance and Institute of Fundraising more widely.

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.
### Appendix 1 - List of stakeholder consultations

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<tr>
<th>Name</th>
<th>Organisation</th>
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<tbody>
<tr>
<td>Ailsa Macfarlane</td>
<td>Arts and Business Scotland</td>
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<tr>
<td>Becky Payne</td>
<td>Historic Religious Buildings Alliance</td>
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<tr>
<td>Carol Akiwumi</td>
<td>Institute of Fundraising consultant</td>
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<tr>
<td>Catherine Elvin</td>
<td>Heritage Lottery Fund</td>
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<td>Claire Routley</td>
<td>Institute of Fundraising consultant</td>
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<tr>
<td>Clare Pennington</td>
<td>Cornwall Museums Partnership</td>
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<tr>
<td>Dave Boyle</td>
<td>Community Shares Company</td>
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<tr>
<td>Ed Stannard</td>
<td>Institute of Fundraising</td>
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<tr>
<td>Eileen Kinsman</td>
<td>Wales Council for Voluntary Action</td>
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<td>Eric Grounds</td>
<td>Institute of Fundraising consultant</td>
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<td>Gemma Thorpe</td>
<td>Heritage Lottery Fund</td>
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<tr>
<td>Gill Jolly</td>
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<td>Glenys Garth-Thornton</td>
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<td>Greg Woolley</td>
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<td>Howard Lake</td>
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<td>Jamie Kerslake-Sim</td>
<td>The Heritage Alliance</td>
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<td>Jo O’Sullivan</td>
<td>Institute of Fundraising consultant</td>
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<tr>
<td>John Williams</td>
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<td>Julia Worthington</td>
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<td>Karon Phillips</td>
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<td>Lizzie Glithero-West</td>
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<tr>
<td>Mark Webb</td>
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<td>Miranda Rowlands</td>
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<td>Murdo Murray</td>
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<td>Rachel Davies</td>
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<td>Richard Norton</td>
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<td>Sam Bee</td>
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<td>Sassy Hicks</td>
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<td>Shane Kelleher</td>
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<td>Valentine Morby</td>
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<tr>
<td>Valerie Morton</td>
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Appendix 2 - Phase 2 Workshops and Venues

**How and When to Apply for Social Investment Funds - NEW**
27 September 2016, London
1 November 2016, Manchester

**How to Set Up a Community Shares Project - NEW**
9 December 2016, The Theatres Trust, London
3 May 2017, Portland Works, Sheffield

**Structuring your Heritage Organisation for Fundraising - NEW**
8 December 2016, London, The Theatres Trust
5 June 2017, Manchester, Elizabeth Gaskell’s House

**Crowdfunding for Heritage Organisations and Utilising Your Networks for Fundraising - NEW**
4 October 2016, London, Stephens House & Gardens
7 February 2017, Manchester, International Anthony Burgess Centre

**Measuring, Communicating & Sharing the Impact of Heritage Organisations to Funders - NEW**
19 October 2016, London, Kelmscott House
18 May 2017, Bath, Museum of Bath at Work

**Heritage Fundraising Planning: Putting your Strategy into Action**
15 September 2016, York, National Railway Museum
22 November 2016, Bristol, SS Great Britain (M)
1 February 2017, Birmingham, The Coffin Works (M)
15 March 2017, Telford, Ironbridge Gorge Museums
23 June 2017, London, The Theatres Trust (M)

*Evaluation of the Giving to Heritage Programme*
Creating a Case for Support for your Heritage Organisation
23 February 2017, Newcastle, Live Theatre

Understanding Fundraising: The Roles and Responsibilities of Trustees in Heritage Organisations
14 September 2016, Birmingham, Birmingham Coffin Works
27 April 2017, Bristol, SS Great Britain

Legacy Fundraising for Heritage Organisations
1 July 2016, Bath, Museum of Bath
26 January 2017, Cambridge University (M)
9 May 2017, London, Kelmscott House (M)

Major Donor Fundraising for Heritage Organisations
21 June 2016, Manchester, Elizabeth Gaskell’s House
3 November 2016, London, The Theatres Trust
7 December 2016, Manchester, Elizabeth Gaskell’s House (M)
9 March 2017, Oxford Castle (M)

Securing Support for your Heritage Organisation from Grant-Making Trusts & Foundations
10 November 2016, Coventry Transport Museum
18 January 2017, London, Kelmscott House

Digital & Social Media for Heritage Organisations
6 October 2016, Leeds, Thackray Museum
5 April 2017, Derby Museum
Corporate Partnerships for Heritage Organisations

21 June 2016, London, Kelmscott House
2 December 2016, Woking, The Lightbox (M)
2 March 2017, London, The Theatres Trust (M)
6 June 2017, Birmingham, The Coffin Works (M)

(M) indicates a Masterclass. These workshops are suitable for more experienced fundraisers and delegates as well as those who have already attended the same workshop subject earlier in the GTH programme.
Appendix 3 - Data Tables

Table A1: Workshops attended - GTH 1 (n=40)

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<td>Corporate Partnerships for Heritage Organisations</td>
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Table A2: Workshops attended - GTH 2 (n=62)

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<tr>
<td>Heritage Fundraising Planning: Putting your Strategy into Action</td>
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<td>Heritage Fundraising Planning: Putting your Strategy into Action (Masterclass)</td>
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<td>Percentage</td>
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Table A4: Workshop Ratings

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<th>Excellent (%)</th>
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<th>Poor (%)</th>
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<th>Don’t know (%)</th>
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<td>Facilities (e.g. venue, catering etc.)</td>
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Link to Figure 4.1
Table A5: Webinars Accessed (n=149)

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<td>Calling All Angels - The Case For Support At St Nicholas Chapel</td>
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<td>Successful Event Fundraising</td>
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<td>Making The Most Of Digital For Heritage Fundraising</td>
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<td>A Mixed Fundraising Model</td>
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<td>Crowdfunding In The Heritage Sector</td>
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<td>Fundraising planning and developing a mixed model - Kingston Lisle case study</td>
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<td>Corporate Partnerships</td>
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<td>From Nothing To Something - Developing Your Legacy Strategy From Scratch</td>
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<td>Trusts, Foundations &amp; High Net Worth Individuals - What Made Them Support Elizabeth Gaskell’s House?</td>
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<td>Planning For Success And Reality</td>
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<td>Individual Giving- Generating Income Via Membership Schemes</td>
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<td>Ironbridge Gorge Museums - How A World Heritage Site Analyses Audiences To Target Fundraising Efforts</td>
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<td>Effective Fundraising Leadership To Support Major Giving</td>
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<td>Partnering With Bigger Organisations</td>
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<td>Magic Messages: The Case For Support</td>
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<td>An Introduction to Social Investment</td>
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<td>All In The Objectives</td>
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<td>Using Matched Funding To Encourage Greater Support For Your Endowment And Capital Campaigns</td>
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<td>Avenue House: Trusts, Foundations And Building A Successful Appeal</td>
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<td>When Mars And Venus Collide: Corporate Partnerships In The Heritage Sector</td>
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<td>Why Begging, Stealing And Borrowing Will Not Bag You A Major Donor</td>
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<td>If It Is Broke... Fix It: How To Find Out If Your Fundraising Messages Are Working</td>
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<td>Community Energy: Funding Solar Power at St Anne’s Church, Highgate through Community Shares</td>
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[Link to related commentary](#)
Appendix 4 - Case Studies
Mark Bains, The Wordsworth Trust

- Accessed the ‘Creating a Case for Support For Your Heritage Organisation’ workshop
- Benefited from a free, one-to-one support and consultancy session to inform approach to contracting fundraising strategy consultants

The Wordsworth Trust is an independent charity which preserves Dove Cottage, the home of the poet William Wordsworth, neighbouring historic buildings and an important collection of works by Wordsworth and other period artists. Located on the edge of Grasmere in the Lake District, the Grade 1 listed building currently receives around 50,000 visitors a year. The Trust is currently in the development phase of ‘Reimagining Wordsworth’, a Heritage Lottery Fund-supported project to modernise the attraction and allow more of its collection to go on display with complementary multimedia features and interpretation. The work will also see improved visitor facilities, a new introductory experience, and better public access to the landscape which inspired one of the nation’s favourite poets.

Fundraising Experience
Mark has a background in arts fundraising and returned to the Wordsworth Trust where he initially held a trainee position to help set up its Development Office in 2001. He has worked on a range of capital and revenue fundraising projects including Arts Council England’s Tier 1 Catalyst programme and the current £6.2m ‘Reimagining Wordsworth’ campaign, which received a Heritage Lottery Fund first-round pass in 2016.

Giving to Heritage Support
After hearing about the programme through emails from both The Heritage Alliance and Institute of Fundraising, Mark accessed the ‘Creating a Case for Support For Your Heritage Organisation’ workshop with the objective of more effectively communicating the Wordsworth Trust’s complex offer which incorporates a visitor attraction with education and outreach for schools and communities, scholarship and research, and a year-round programme of activities.

The programme underpinned the Trust utilising Stephen Pidgeon’s Four Pillars approach to writing a case for support which uses an enemy, a recipient, a hero, and a vision of a ‘happily ever after’ in a story to encourage buy-in from a funder or supporter. The approach was used to design a leaflet appeal with an international reach in which the Wordsworth ‘case for support’ was clear and emotive with Dove Cottage described as a place of respite or sanctuary in a stressful world.

“I finally found something which applied fundraising thinking to charities and heritage”

Impact
The Giving to Heritage workshop came at the right time to inform both ongoing and forthcoming fundraising campaigns. Mark reported seeing a strong improvement in his skills and moderate improvement in his confidence in fundraising from private and corporate sources as a result of accessing the Giving to Heritage programme with the target set for donations linked to the leaflets surpassed by almost 400%. Key to this was the new approach to establishing a case for support which shifted the focus away from the needs of the Trust towards the donors’ emotions and aspirations for Dove Cottage. Mark attributes £67,500 in donations plus match funding to the impact of the Giving to Heritage programme with the learning from the approach inspired by the Giving to Heritage workshop now being used to support the match funding campaign for their latest HLF bid.

Links
www.wordsworth.org.uk
Lauren Perthen - York Museums Trust

- Accessed the ‘Creating a Case for Support for your Heritage Organisation’ and Structuring Your Heritage Organisation for Fundraising’ workshops
- Accessed the ‘Making The Most Of Digital For Heritage Fundraising’ webinar on demand

Lauren is the Membership Supervisor for York Museums Trust (YMT) - an independent charitable trust established in 2002 to manage the museums and gallery service previously run by City of York Council. YMT operates York Castle Museum, the Yorkshire Museum and the multi-award winning York Art Gallery, and is responsible for protecting and conserving over 1.8 million collection objects, ten listed buildings, two Ancient Monuments and the twelve-acre York Museum Gardens entrusted by the City of York Council. It has aims to attract more visitors to its sites, create learning opportunities and contribute to the development of the economic and cultural life of York and the wider region - all of which require substantial funds.

Fundraising Experience
Lauren has a broad background in fundraising but is keen to develop her skills and knowledge to support the Trust’s work by improving existing approaches, for example, how to more effectively make the case for support and exploring new methods including crowd funding.

Giving to Heritage Support
Having heard about Giving to Heritage through communications from The Heritage Alliance and Institute of Fundraising, Lauren has accessed support during both phases of the programme, supplementing a workshop on creating a case for support with a webinar on digital fundraising. She described the training as fantastic, rating all aspects of the workshops as ‘excellent’.

“Importantly it’s affordable as it can be difficult to secure approval to attend training given budget pressures.”

Giving to Heritage training has helped the Trust to develop a new case for support, develop its fundraising strategy, amend their existing YMT Card membership scheme and lay foundations for a new higher-level giving scheme. They have also launched their first Crowdfunding campaign to support its Leisure Land Golf initiative - a fully playable crazy golf course, with each golf hole designed and made by a different artist.

Impact
Lauren attributes a strong improvement in both her skills and confidence in fundraising from private and corporate sources to the Giving to Heritage programme. She also states that as a result of the support, both the organisation’s management of its heritage offer and financial resilience will have improved, attributing fundraising in the region of £20,000 through crowd funding and individual giving to the programme.

“Giving to Heritage programme has directly helped us to maximise donations”

Lauren also highlighted the value of the programme in engaging with people in similar roles and finding solutions to similar problems, reaching out to contacts made through the workshop for support and advice regarding CRM systems and the implementation of a generative web platform capable of delivering membership sales and renewals, donations, event ticketing and admission ticketing.

“Giving to Heritage has significantly improved my confidence with regard to making the ask and it has helped me to make a clearer ask for a clearer cause.”

Links: [https://www.yorkmuseumstrust.org.uk/](https://www.yorkmuseumstrust.org.uk/)
The Revd Phillip Johnson - All Saints Weston Green

- **Accessed the ‘Securing Support for Your Heritage Organisation from Grant - Making Trusts & Foundations’ workshop**
- **Benefited from a free, one-to-one support and consultancy session to inform a funding application**
- **Followed up with Executive Coaching to support a new fundraising team**

Philip is the Vicar at All Saints Weston Green Church of England parish church in Esher, Surrey. Following a fire risk assessment his fundraising requirements increased from ongoing maintenance work to supporting a major capital build to refurbish the church hall, replace the electrics in the church and improve the external landscaping.

**Fundraising Experience**

Phillip had a background in fundraising in the arts when joining the Church nine years ago and joined All Saints Weston four years later. Prior to accessing Giving to Heritage the Church had never accessed a grant and relied upon donations from its parishioners for 97% of its income, prompting Phillip to seek the specialist information and guidance available from the programme.

**Giving to Heritage Support**

Phillip built upon his positive experience of attending the ‘Securing Support for Your Heritage Organisation from Grant - Making Trusts & Foundations’ workshop and accessing a free, one hour support and consultancy session by signing up for a programme of Executive Coaching. The series of sessions delivered over approximately six months enabled Phillip and the church’s Board to access training tailored to their needs and the development of a bespoke fundraising strategy which enables the church to raise funds more effectively whilst maximising the skills and time of a new part time fundraiser and a 12-strong fundraising ‘Stewardship Team’.

“Churches are now so complex to fundraise for, running costs have trebled in 10 years”

The flexibility offered by the Executive Coaching programme delivered by an Institute of Fundraising consultant working in partnership with Phillip and the Board has transformed the church’s approach to fundraising which make the most of church’s value to the community and expanding its case for support beyond the congregation whilst adhering to the organisational constraints placed upon the Church of England when fundraising. The sessions have been used to develop the skills of the ‘Stewardship Team’ in line with a new fundraising strategy which aims to see the church operate more like a charity in order to compete with other organisations.

**Impact**

Phillip reported seeing a strong improvement in both his skills and confidence in fundraising from private and corporate sources as a result of accessing the Giving to Heritage programme with the initial support linked to successful bids for £10,000 from the HLF and a further £6,000 from three different Grant Making Trusts. However, the financial resilience of All Saints Weston Green has been boosted significantly with news of a successful grant application for £80,000 and securing individual giving of over £100,000. Both these successes are directly linked to the Executive Coaching programme with improvements in the language and approach used proving to be crucial.

“The programme has been a game changer”

**Links**

http://www.allsaintsweston.com/
Sue Parsons - Winterbourne Medieval Barn Trust

- Participated in eight workshops covering the following topics - developing a heritage fundraising plan, creating a case for support, putting strategy into action, events fundraising, gaining support from trusts & foundations, major donors, community fundraising, digital fundraising and corporate partnerships.

- Participated in two Masterclasses - Heritage Fundraising Planning: Putting your Strategy into Action and Major Donor Fundraising for Heritage Organisations

- Watched one webinar on demand - ‘Fundraising In The Community: Hastings Pier - Community Shares’

Situated to the north of Bristol, the Grade II listed Winterbourne Medieval Barn was built in 1342. Whilst South Gloucestershire Council jointly financed a restoration programme with English Heritage in 2002, the Winterbourne Medieval Barn Trust (WMBT) is now working in partnership with the Council to regenerate the barn into a community-led project based on heritage, food and farming education.

Fundraising Experience
Sue joined WMBT after retiring from a successful career in management accountancy, bringing her project management skills to the Trust on a voluntary basis to help with funding bids before later becoming Chairman. She had no previous experience of fundraising so required support to build and hone her skills in terms of heritage fundraising expertise and know-how.

Giving to Heritage Support
Sue rated all aspects of the Giving to Heritage workshops attended as either good or excellent with an appreciation of the content and overall approach which made no assumptions of prior knowledge. The workshops were helpful in meeting the needs of participants with different levels of knowledge and understanding in a helpful and supportive learning environment. The Institute of Fundraising consultants delivering the workshops were able to provide the latest advice and guidance, with their knowledgeable of each topic area incorporating a variety of heritage case studies useful in adding value to the support provided by local partners to the benefit of her project. This was also enhanced by the additional support and examples provided by the Heritage Experts who offered both good practice and examples of when they had changed their approach in response to failure.

Impact
The Giving to Heritage offer has supported the Trust’s work in planning for a major fundraising campaign to support its community-led project focused on heritage, food and farming education. WMBT needs to raise £400,000 of match funding after being awarded an HLF Development Grant to support a major refurbishment project. This grant is working to invest in the whole site (i.e. facilities etc.) to enable them to generate annual income of around £100,000 to support the maintenance of the historic buildings. They have used the learning from the sessions to launch a new fundraising strategy which will incorporate a major donor event, community fundraising campaign and crowdfunding campaign. To date they have secured funding from Trusts and Foundations, including £20,000 which they attribute directly to the Giving to Heritage programme.

“Small organisations can’t afford large training fees so the programme has been fantastic”

Links
http://www.winterbournebarn.org.uk/
Alison Richmond - Institute of Conservation (Icon)

- Benefited from Executive Coaching from an Institute of Fundraising consultant – 6 x 3 hour sessions over 6 months
- Icon was so impressed with the sessions that they accessed a second programme at a cost of £2,000 to develop a fundraising strategy and train members of the Senior management team and Trustees

Icon is a registered charity and the professional body which raises awareness of the cultural, social and economic value of caring for heritage. It champions high standards of conservation and represents nearly 3,000 individuals and organisations including professional conservators and conservation scientists.

Fundraising Experience
Alison is the CEO of Icon and responsible for strategic planning and implementation, internal operations and external relations. Although a significant part her role, Alison has not benefited from any formal fundraising training prior to reading details of the Giving to Heritage programme in The Heritage Alliance newsletter, Heritage Update.

Giving to Heritage Support
Alison originally accessed the Executive Coaching offer in order to inform Icon’s approach to ongoing fundraising and build on nine years of HLF funding to support its Conservation Internship Project. Including an initial meeting with an Institute of Fundraising Consultant to assess their needs and plan a bespoke development programme. The six sessions across a six month period to December 2015 were the perfect way to discuss both Alison’s and Icon’s fundraising requirements within a trusted environment and any lack of experience or training overcome on a one-to-one basis.

“I appreciated the slightly less formal atmosphere that allowed us to discuss as well as to absorb”

Icon’s second Executive Coaching programme was used to develop a new fundraising strategy informed by a meeting led by the Institute of Fundraising consultant and presentation to the full Icon Board in September 2016. Icon also used its time with the consultant to plan and deliver two training days attended by members of the Senior Management Team and Board of Trustees covering ‘Writing a Case for Support’ and a bespoke session focused on putting Icon’s Fundraising Plan and Strategy into practice.

Impact
The Executive Coaching support has enabled Alison and Icon to develop a strategic approach to fundraising with the support of a Consultant able to assess the needs of both an individual and a heritage organisation. The initial programme of Executive Coaching resulted in a better understanding of what a fundraising strategy should look like and led to work with Icon’s Board of Trustees to refine and develop a case for support and mission as part of a strategic plan. The second programme encouraged a whole-organisation approach to fundraising with senior management and Trustees supported to inform and deliver the organisation’s targeted fundraising strategy.

“The discussion about targeting effort and how much the return on different types of fundraising were likely to be was extremely illuminating”

“The knowledge and skills we learnt will be useful to Icon both now and long term”

Links
http://icon.org.uk/