



## **Evaluation of the Giving to Heritage Programme**

### **Summary**

This study was commissioned by The Heritage Alliance and delivered by **Jamie Buttrick** and **Andy Parkinson** from Consilium Research & Consultancy.

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## Introduction

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

Giving to Heritage is the largest of the grants awarded with a total 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. The two-year programme aimed to achieve the following outcomes:

### 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.

The evaluation was based on a combination of desk research, consultation with 32 stakeholders involved in the management and delivery of the programme, an online survey generating 160 valid responses and 21 in depth consultations with organisations and individuals benefiting from the programme offer.

## Management arrangements

The Giving to Heritage programme is **delivered through a partnership between The Heritage Alliance and the Institute of Fundraising**, drawing upon the Heritage Alliance's access to the heritage community and the fundraising training expertise of the Institute of Fundraising.

**The Heritage Alliance** is the lead partner for the Giving to Heritage programme. It is the voice of the independent heritage sector in England and acts as an independent advocate for England's heritage, sharing knowledge and expertise. It also lobbies for legislation and policies to ensure the benefits of heritage are realised by government, communities and individuals. The Heritage Alliance managed the initial marketing and promotion of Giving to Heritage. 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.

**The Institute of Fundraising** has worked alongside The Heritage Alliance to deliver the programme. It is the professional membership body for UK fundraising with a mission to support fundraisers through leadership, representation, standards-setting and education as well as championing and promoting fundraising as a career choice. The Institute of Fundraising was responsible for the planning and delivery of the Giving to Heritage training in partnership with The Heritage Alliance. It was also responsible for the workshop content, commissioning a bespoke curriculum for the programme with input from The Heritage Alliance to achieve a suitable heritage focus. Where possible, Institute of Fundraising trainers were accompanied by volunteer Heritage Experts able to share their experiences and add value to the training.

A **Steering Group** provided a strategic overview for the programme 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. Overall the Steering Group is thought to have provided useful strategic guidance from an informed organisational and sector perspective.

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 partner organisations. On the whole, the project management arrangements are thought to have worked well with two quite different organisations (i.e. in terms of scale, scope and sector) combining their strengths to the ultimate benefit of the Giving to Heritage programme.

### Programme development and delivery

Training commenced in June 2014 following an initial pre-delivery phase comprising initial marketing activity, development of the Giving to Heritage website and curriculum design. The main programme activity was to run to March 2016 although a 10% underspend enabled the programme to be extended to June 2016 to undertake a variety of post-training tasks. A one year extension to the programme to June 2017 was secured by The Heritage Alliance in March 2016.

The programme offer has evolved in response to patterns in take up of the various training offers and feedback from participants and delivery staff. The major change has seen the offer of up to 50 Action Learning Sets (half day sessions for 12 people on topics chosen by the group - £20 per person) evolve into a **refined Executive Coaching** offer. The Executive Coaching involves the delivery of bespoke advice sessions over a six month period based on an initial meeting to discuss development needs, available resources and fundraising objectives. Other amendments to the offer have included the **downsizing of the Mentoring Programme** to 11 pairings and a **streamlined approach to the Surgeries** in the form of a one hour, free consultancy session with an Institute of Fundraising trainer.

#### Key statistics summarising the Giving to Heritage programme offer and take-up to 1<sup>st</sup> April 2016:

- **105 workshops delivered with 1,097 places taken up by 805 unique individuals and 551 unique organisations**
- **25 webinars presented**
- **141 1-2-1 Consultancy / Surgery Sessions undertaken with 111 unique participants from 99 unique organisations**
- **1,234 participants in face-to-face training**
- **916 unique individuals engaged in Giving to Heritage**
- **648 organisations represented at Giving to Heritage opportunities**
- **11 mentoring pairings formed**

**The role of volunteers in delivering or supporting elements of the Giving to Heritage has been substantial.** Sourced directly by The Heritage Alliance, the professional time of the mentors and Heritage Experts has all been provided on a pro-bono basis. When added to the time devoted by the Steering Group volunteers, the programme exceeded the added value target requested by the HLF over and above the £0.5m grant. The overall value of professional volunteer time has been £91,210 bringing the total value of the Giving to Heritage programme to £620,610.

### Marketing and promotion activities

Effective and efficient promotion of Giving to Heritage is crucial to the recruitment of participants for an England-wide offer with good geographical coverage (at least two core workshops were held in each of the nine English regions) where organisations and individuals most in need of support may not be actively engaged in national or regional heritage networks.

Targeted and repeated promotion with local groups and organisations has been necessary in order to maximise attendance at specific workshops - a task recognised by other Catalyst programmes and reflected in the significant time and effort of the Giving to Heritage Project Manager. Regular emails from the Institute of Fundraising and inclusion in the Heritage Alliance's e-newsletter '[Heritage Update](#)' have been effective ways to forward information of the Giving to Heritage offer to those actively engaged in The Heritage Alliance or Institute of Fundraising networks.

**An average of 9.6 participants attended each workshop.** The highest attendance was 18 in one workshop and the lowest two - recorded in four separate workshops. Where the marketing and promotion of a workshop has proved unsuccessful (i.e. the number of bookings has failed to meet the Institute of Fundraising's minimum booking ratio of 40% within two weeks of the delivery date) workshops have been cancelled. Analysis of demand for workshops and the pattern of cancellations suggested **a relative lack of demand in the North East and Eastern regions** of England in particular. Consultation with stakeholders and programme beneficiaries failed to provide a definitive explanation for these 'cold spots' although a number of other organisations expressed similar issues in relation to their training offers. Amongst the potential explanations offered were:

- A lack of strong local and regional networks including regional Institute of Fundraising activity;
- Issues with travelling to 'central' areas from rural areas; and
- The effects of economic cutbacks leading to a culture of short termism and fire-fighting.

### Workshops

A large majority of respondents to the participant survey (146 or 92%) had participated in at least one of the 105 workshops delivered through the Giving to Heritage programme with 27 respondents (19%) attending three or more workshops. The most popular workshops amongst respondents were 'Heritage Fundraising Plan - Putting Your Strategy Into Practice' and 'Securing Support for Your Heritage Organisation from Grant-Making Trusts & Foundations', each attended by 41 respondents (29%) of respondents.

The Giving to Heritage workshops were very well received:

- 94% rated the workshops as either 'excellent' or 'good'
- 91% rated the quality of the trainers as either 'excellent' or 'good'
- 81% rated the value for money represented by the workshops as excellent (98% as either 'excellent' or 'good')
- 96% rated the organisation of the workshops as either 'excellent' or 'good'
- 83% rated the learning materials as either 'excellent' or 'good'
- 82% rated the relevance of the workshops to themselves or their organisation as either 'excellent' or 'good'

One of the underlying issues raised by a combination of stakeholders and workshop participants is the role of the Heritage Expert and the related need for a 'heritage focus' to the learning materials and wider workshop. There was a consensus that participants with less experience of fundraising, or even attending training workshops more generally, benefited most from heritage-focused case studies and examples. On this basis, the inclusion of the Heritage Expert and desire for a heritage focus to any case studies or examples reflects well on the programme by assisting participants to link fundraising guidance more effectively to their own project or organisation.

In most cases workshop participants praised the quality, content and amount of learning materials provided. There was a slight undercurrent of frustration, by a minority of respondents, that the workshops were aimed more at people with little or no skills or experience in fundraising, were too general or lacking in practical tools which limited the value for those looking to add to their existing knowledge.

In addition, feedback from trainers included a degree of frustration that courses were too long and a little pre-prescribed given the variability in the fundraising skills and confidence of participants in some groups. However, in the majority of cases, the skills and experience of the trainer were acknowledged as being able to overcome any perceived or actual weaknesses in the learning materials with respondents welcoming attempts to add value to some slides through additional information, specific case studies or anecdotes.

### Webinars

The Giving to Heritage programme delivered 25 webinars which largely reflected the content and messages provided through the workshop sessions. The majority of the webinars (19 of 25) were delivered by the Heritage Experts responsible for the case study being presented, adding significant value to the programme given their volunteer status and subject-area expertise. Just over one in five respondents (32 people or 21%) to the participant survey had viewed a webinar - 17 respondents or 11% viewing it live and 18 people or 12% of all respondents viewing it on demand from a recording. The most popular webinar (accessed by 11 respondents or 33%) was 'Fundraising In The Community: Hastings Pier - Community Shares'.

### Mentoring

The Giving to Heritage mentoring scheme provided the opportunity, free of charge, for participants to benefit from a one-to-one mentoring relationship typically based on regular (e.g. monthly) face to face or telephone/Skype meetings complemented by email. The mentor-mentee pairs were active between March 2015/16 with participation dependent on involvement in a heritage project, the support of employers and involvement in or experience of fundraising. Mentees progressing through an application stage attended a 'matching session' in either Manchester or London in November 2014.

The Giving to Heritage programme supported 11 pairs of mentors/mentees in response to sector feedback indicating a high level of interest in a structured mentoring scheme. Despite the initial target of 24 pairings not being met as demand from mentors failed to materialise, the participant survey confirmed an ongoing demand for such a scheme with suggestions for ongoing support in the extended programme period. Although mixed overall, the response to the scheme from mentors and mentees provided positive feedback on the training and impact on softer elements of mentoring (e.g. emotional support, career guidance, providing a sounding board and confidence building) of professional development.

Mentors consulted for the evaluation appreciated the benefits of providing face-to-face support to mentees, acknowledging the opportunity to share their skills and experience with mentees in their own work environment. Mentees consulted acknowledged the simple application and mentor-matching process and the value of speaking to someone objective and able to bring experience and expertise from similar projects. In particular, a heritage-focused mentor was judged to complement more generic fundraising skills and experience whilst providing reassurance that mentees were doing the right thing - therefore increasing their confidence.

### Free, one hour Support and Consultancy Sessions

Free, one hour support and consultancy sessions were taken up by 21 respondents (14%) to the participant survey who emphasised the value of experts in answering specific questions, providing advice or ideas linked to fundraising or wider issues at both an individual or organisation level.

***"Concrete, practical advice. Made planning of specific projects more effective."***

***"I gained excellent advice in advance of launching a crowdfunding campaign which was hugely successful."***

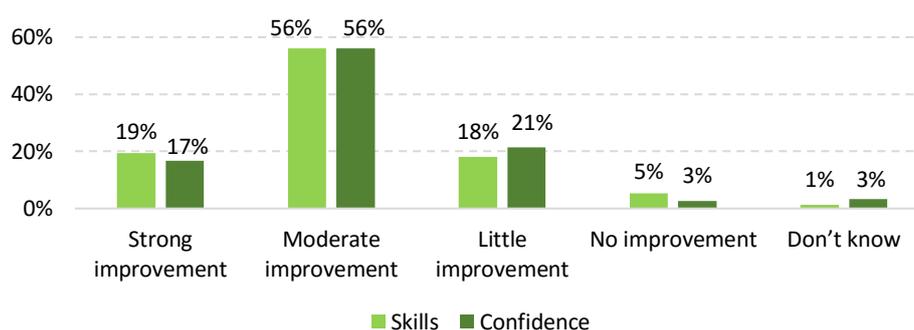
***"I had one to one help on a grant application to HLF and we successfully received £10,000 towards the project."***

However, take up of the free, one hour consultancy sessions was lower than expected given the value for money the offer represents and the usual desire for participants in group sessions (e.g. the workshops) to ask questions related specifically to their own projects.

### Skills and confidence in fundraising from private and corporate sources

The Giving to Heritage programme has successfully improved the skills and confidence in fundraising from private and corporate sources of the majority of people accessing the range of support on offer. Approximately three quarters of respondents reported strong or moderate improvements in their skills (73%) and confidence (75%) as a result of accessing the Giving to Heritage programme.

#### Improvement in skills and confidence in fundraising from private and corporate sources due to involvement in the Giving to Heritage programme



The impact of the Giving to Heritage programme has been particularly apparent amongst participants with low levels of skills and confidence in fundraising from private and corporate sources. The participant survey found that 75% of respondents with 'very poor' skills reported moderate or strong improvements in their skills. Similarly, 87% of respondents with 'very poor' confidence levels in fundraising from private and corporate sources reported moderate or strong improvements in their confidence.

### Application of Giving to Heritage training

Just over one third of respondents to the participant survey have been able to use either all or the majority of the Giving to Heritage training in their role. A further 39% have, to date, been able to apply some of the training. Cited by 83% of respondents, sharing the learning with colleagues, volunteers or board members was by far the most frequently reported way in which the Giving to Heritage training has been used. Crucially, this means that the reach of the programme has been potentially far greater than just the number of participants attending workshops.

Just under one third (31%) 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 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).

### Income generated from private and corporate sources

Just under one third of respondents (32%) 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. Over half (53%) of respondents reporting a rise in income from private and corporate sources identified 'trusts and foundations' as a source of this funding.

26 respondents were able to estimate approximately how much income raised could be directly linked to the Giving to Heritage Programme. Figures reported total £745,000 and range between £100 to £400,000 - **an average of £28,673 per respondent reporting an increase in income from private and corporate sources.**

### Financial resilience

As a result of Giving to Heritage programme support 31% of 142 respondents to the participant survey stated that their heritage organisation is now **more financially resilient**.

### Heritage offer management

As a result of Giving to Heritage programme support 42% of 139 respondents to the participant survey stated that their **heritage offer is better managed**.

### Community

The **value of peer to peer engagement** within the workshops was a common theme emerging from the evaluation. Participants consistently highlighted the benefits of discussing similar experiences, problems and solutions with other heritage organisations, confirming the willingness of heritage organisations to share good practice and information. Just over half of respondents (53%) to the participant survey had built upon these positive experiences from the Giving to Heritage workshops, in particular by forming either a group or extended contact with peers in the heritage sector.

### Ongoing support needs

The **ongoing need for the support offered through the Giving to Heritage programme** is confirmed by 92% of respondents feeling there remains sufficient demand for similar training in the future. In the main, respondents were happy for a simple continuation of the programme offer in order to meet the needs of heritage sector organisations and individuals who had yet to (fully) benefit from the programme. However, there was also agreement that the opportunity for higher level courses would be beneficial for people looking to build on the initial workshops or with a base level of skills and knowledge.

### Impact Summary

- There is widespread recognition that the impact of the Giving to Heritage programme will not always be tangible/quantifiable in the short term and that the support on offer should not be seen as a 'quick fix'. There is a need for learning to be applied and results to take shape.
- The participant survey emphasises both the relevance and need for the support provided by the Giving to Heritage programme with a large proportion respondents reporting low 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.

### Conclusions

The Giving to Heritage programme has successfully achieved or worked towards each of its stated aims and objectives. The extension to the programme (to June 2017 for training and August 2017 for post training administration) should enable greater clarity on the scale and scope of its impact at a sector, organisation and individual level. Key conclusions underpinning this statement are summarised below.

### Management and Delivery

1. The project management arrangements for the Giving to Heritage programme are thought to have worked well with partners working together to maximise their respective strengths to promote and deliver the programme. The programme has worked well in offering a flexible approach to adapt and evolve to meet a number of operational challenges.

2. The programme has successfully delivered a range of training and support to a large number of people from a wide variety of heritage organisations across England, delivering 105 workshops, 137 one-to-one and surgery sessions in addition to targeted mentoring work and a sustainable legacy provided by a suite of webinars.
3. The role of volunteers in delivering or supporting elements of the Giving to Heritage has been substantial with the professional time of the mentors and Heritage Experts being provided on a pro-bono basis.
4. The scale of the task to market and promote the Giving to Heritage programme was underestimated before the programme started with particular effort required to target specific areas/workshops through local networks.
5. The Giving to Heritage workshops have been very well received with very high satisfaction ratings overall. The value for money represented by the programme was particularly highly rated.
6. Reflections on the input of the Heritage Expert were generally positive with the greatest added value provided where a trainer had little heritage-specific experience or in a group with low levels of skills and confidence in fundraising.
7. The response to the mentoring scheme from mentors and mentees has been mixed with positive feedback on the training and impact on softer elements of professional development contrasting with criticism of the level and quality of ongoing support.
8. Low levels of take up of the free, one hour support and consultancy sessions have been linked to time pressures, ineffective marketing and workshop beneficiaries not having a perceived need to access the support at their stage of fundraising.

### **Impact**

9. There is widespread recognition that the impact of the Giving to Heritage programme will not always be tangible in the short term and that the support on offer should not be seen as a 'quick fix'. There is a need for learning to be applied and results to take shape.
10. The participant survey emphasises both the relevance and need for the support provided by the Giving to Heritage programme with a large proportion respondents reporting low levels of skills and confidence in fundraising from private and corporate sources prior to accessing the programme.
11. 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.
12. Just over one third 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. The training has been shared with colleagues, used to support applications for funding from new sources and in the course of developing an existing fundraising strategy.
13. The participant survey found that approximately one third of respondents had experienced challenges in applying the training in their organisation. The major barriers to applying the learning were organisational constraints, time and a requirement for more detailed and/or higher level training to inform fundraising activities.

- 14.** Just under one third of respondents to the participant survey have increased their income from private and corporate sources as a result of participating in the Giving to Heritage Programme. 26 organisations were able to estimate that they had raised a total of approximately £745,000 - an average of £28,673.
- 15.** The ongoing need for the support offered through the Giving to Heritage programme was confirmed by 92% of respondents. In the main, respondents were happy for a simple continuation of the programme offer in order to meet the needs of heritage sector organisations and individuals who had yet to (fully) benefit from the programme. There was also agreement that the opportunity for higher level courses would be beneficial for people looking to build on the initial workshops or with a base level of skills and knowledge.

### Recommendations

- 1.** Consultation with stakeholders and a range of programme beneficiaries stresses the need for intensive, targeted and repeat marketing activity in order to reach those most in need of support. The scale of this task should be reflected in planning for the extension to the programme to June 2017.
- 2.** More sophisticated marketing activity going forward could include more productive use of an image bank, positive case studies and (re)use of targeted media packs to engage more effectively with sector media and support the efficient signposting to the programme through intermediary organisations.
- 3.** Clearly highlighting the value of the programme including the heavily subsidised nature of the workshops could have positive effects on recruitment, the number of cancellations and ongoing use of the information provided.
- 4.** A holistic and organisational approach to fundraising embedded in an organisation will provide greater and more sustainable impacts in the longer term. Attempts should be made, where relevant, to encourage take up of the Giving to Heritage offer at both a strategic and operational level within heritage organisations.
- 5.** Consultation has confirmed the relatively low levels of skills and confidence in fundraising amongst many individuals and heritage organisations. There is a need to maintain the current suite of workshops but also to cater for organisations looking to build on their existing skills through higher level training.
- 6.** The impact and effectiveness of the workshops would be improved through the regular input of the trainers charged with delivering, and in some cases, designing them.
- 7.** The study has revealed the potential for an online question and answer forum incorporating responses from both fundraising experts and peers offering practical advice. This should be explored and promoted alongside activities to market short one-to-one sessions more effectively.
- 8.** Contacting participants from the programme on a more consistent basis to reinforce the need to monitor its impact and gather positive content to inform case studies could encourage a better response to monitoring and evaluation requests. It could also act as encouragement for participants to begin to put the training into action.



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