

# HERITAGE ASSET AUDIT

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## FINDINGS & RECOMMENDATIONS



Commissioned by the  
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## 7. Heritage Audit Findings and Recommendations

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The 'Findings and Recommendations' are set out in 3 sections. Firstly, we have included a summary of the findings from the Catalyst Programme. Secondly, we have included a short section on the audit process itself. These audits were carried out as part of the wider Catalyst programme, with some additional funding from Historic Environment Division. They were always meant to be a 'pilot project' which could be developed or extended in the future, depending upon our findings. The third section brings together a relatively simple range of general recommendations, which reflect the findings from the five audits and wider experience from the Catalyst programme. There are more specific ideas and recommendations for each area within each audit. As noted in the introductory section, the sector has just produced a new 'compelling narrative, entitled 'Treasure the Past; Enrich the Future'. We have used this structure to organise the recommendations.

### *Findings from Catalyst*

NIEL's Catalyst programme provided a range of experience, in terms of the kinds of supports that the heritage/environment sector in Northern Ireland needs. The learning from the programme can be summarised as follows –

- It exceeded all stated targeted outputs – 2000 plus individual participants, 100 plus sectoral organisations, 100 plus programme activities – within an overall budget of £400,000 over five years
- The programme initially had to be generic given the nature of the "heritage" sector in NI – but evolved to deliver a more targeted and bespoke programme
- It was successful in leveraging in a range of other funding – from sources including a Charitable Trust, corporate/private sector, central Government Departments
- It was particularly successful at leveraging in-kind support, such as venues and pro-bono input from consultants
- The programme's focus had to be beyond only "private" funding because the NI private sector is smaller than elsewhere in the UK.
- The programme could not just focus on "accessing" funding but had also to give attention to the managing, investing, using and accounting of monies.
- The definition of "heritage" was perhaps more broadly understood and applied in Northern Ireland than elsewhere in the UK
- There was an appetite for both accredited and vocational training courses and workshops - but it was difficult to assess the best balance across both forms of training delivery given the initial tight timescale and available resources.
- Too much was attempted initially over too short a time and with too little money
- There was an opportunity in an extended programme for a more substantial engagement with Northern Ireland regional and local government and associated public agencies.
- The programme challenged existing cultures and attitudes on what constituted "fundraising" – in particular on "charitable" status and the world of philanthropy and "corporate" engagement with the world of commerce

- The programme helped/provoked other agencies to enhance their respective fundraising training and support services
- The programme helped to embed fundraising practice skills, knowledge and experience within CVSE Third NGO Sector organisational culture and practice
- Catalyst helped establish a cadre of IoF accredited fundraising trainers across a broad spectrum of Northern Ireland's VCSE Sector
- Sharing and promoting best practice case studies and field visits was considered to be very important
- There was a clear benefit in connecting different types of fundraising expertise; greater cohesion across miscellaneous fundraising support and training agencies and interests benefits from economies of scale, shared learning materials, practice and resources, collaboration and partnership; there is significant potential for greater collaboration in the future
- There was a very clear preference amongst organisations for tailored support, particularly mentoring;
- Capacity of organisations remains a significant issue; organisations increasingly find it difficult to find the time to attend training courses, and accordingly very difficult to follow up in delivery, following attendance at training
- Future programmes could make excellent use of pro bono resources and other in-kind support
- Future programmes should emphasize web-based fundraising information and learning facilities and resources
- The local relationship with the HLF in Northern Ireland was excellent and very supportive – evidenced by HLF's flexibility in agreeing to 2 extensions of the project
- There is an opportunity to make more use of the programme's dedicated website for online fundraising information, resources, networking and references – beyond only programme information and promotion. NIEL, subsequently, using its own remaining resources, may be able to make better use online of the amassed programme materials?
- The programme included substantial elements around social finance; this is an area which the sector has been slow to adopt but offers real opportunities, particularly for organisations which manage an asset
- At a time when traditional forms of funding – such as grants from government and Trusts - is reducing, there are ever increasing opportunities for new forms of social finance
- NIEL has developed a clear sense of what is required to assist and develop fundraising capacity building within the sector; this should be based more around the second phase of the Catalyst programme, where training was specifically tailored for small sub sectors, where mentoring was more prominent, and where a range of support providers were enlisted sometimes offering complementary interventions

### *Catalyst Conclusion*

Overall, the Catalyst Programme, 'Investing in Northern Ireland's Heritage,' has been successful. The feedback has been extremely positive, a very large number of individuals and organisations have experienced some form of training, and the sector will inevitably have a broader experience, knowledge and skills base.

However, there are some things which are simply beyond any programme. In the period since Catalyst began, the NI voluntary sector has seen probably, the greatest squeeze on public funding that it has experienced in the last 30 years. As Catalyst was finishing, in early 2018, there was huge uncertainty about the future of funding – Government, Trusts and even HLF. More than ever, the heritage sector needs government agencies to pull together, and present a strategic approach to funding. There also needs to be room within this funding to continue to support organisations in increasing their own fundraising capacity and organisational resilience.

## **1. The Heritage Audit process**

The audit was developed in a staged way, as extra resources became available. This allowed for 2 consultants to be employed. Given that this was always meant to be a pilot project, this has provided the advantage of allowing us to look at slightly different approaches to the process. One consultant followed a more structured approach, more based around desk-based research, and providing more of a general overview of the heritage. The other consultant (who was actually a team of 2) took a more ‘involved’ approach, with more meetings with local people, and a more in-depth approach to the history and heritage itself. Interestingly, the reports all provide similar outputs – with some differing emphases – and the recommendations are quite similar.

Our main learning from the process would be:

- The timeframe was extremely tight; trying to complete 5 quite detailed audits in this period was difficult for the consultants and for the Project Manager.
- Having said that, a considerable amount of time was consumed at the early stages of the project in clarifying the processes, structures and parameters of the research. If more audits were carried out they would benefit from the existing knowledge and that a successful methodology has now been tested.
- A key aspect of the process was engagement with organisations and individuals to get a better understanding of the area, and particularly the issues and opportunities facing heritage. Unfortunately this can be a slow process. Meeting with individuals and groups is time consuming and needs to be allowed for.
- The online surveys were indispensable. One clear benefit of the pilot is that there are now a number of different surveys available, bespoke for organisations and individuals.
- In terms of content, the audits contain a large amount of useable information. Not only have they brought a range of information about each area together into one document, the process has also provided the opportunity to carry out original research, and to really consider the options for heritage in each area.
- The Asset Assessment forms were purpose-designed for these audits. A good deal of work went into these, looking at established templates and also considering how they could fit in with future programming of HED. These proved extremely valuable. Again, the fact that the template has now been established and is proven, would make future audits easier.
- There were particular issues with the North Belfast Audit, in terms of setting the geographical boundary. There were many conflicting views on what denotes North Belfast, and inevitably some readers will feel that the audit area is not correct.

- One essential question to be answered is ‘Did we learn anything new by the process? Fortunately, the answer is clearly yes.
  - The overall process provided a huge amount of information about each area
  - The asset assessments provided the opportunity for an in-depth understanding of individual sites and monuments, and the chance to consider how these could best be used/protected/developed
  - The surveys and discussions allowed for a much better understanding of heritage and the issues and opportunities in each area. We found that each area was truly different, faced with different issues and opportunities. We would not have found this without this depth of engagement.
  - The general recommendations in the section below, would help all of heritage in Northern Ireland, and cover findings from each area. However, for any single area to fully reach its potential, it requires bespoke support (as set out in the individual audits).
- Should more audits be completed? The 5 audits provide an excellent overview of the state of our sector in Northern Ireland, but they are obviously based in specific locales. The answer really depends on what information we are looking for.
  - If we want to develop a really in-depth understanding of heritage and the sector across Northern Ireland, then the best approach would be to develop a patchwork of audits which covers 100% of Northern Ireland. The best way to do this would probably be by working in partnership with local councils.
  - If the aim was rather to develop our general understanding of the sector, the best approach would probably be to replicate the process we have gone through, and make a strategic selection of the areas which we would gain most value from auditing. In this approach we would be seeking to learn the maximum amount, by focusing on areas which represent as many different aspects of our heritage as possible.

## 2. Overarching recommendations

There are a number of general comments we can make about the findings from the audits. Heritage across the 5 areas, faces many of the same issues, as well as similar opportunities. Everywhere is facing an increasingly difficult public funding situation, but there is also a growing realisation across the sector (and wider society hopefully) about what heritage can achieve and the opportunities afforded. In each section below we have given a brief description of our findings, and then set out a short number of recommendations. Some of these have come directly from the participants in the audits, and some from the project management team.

### 2.1 Prosperity: Supporting our Prosperity

One of the clearest marks of how our sense of heritage has changed, is the emphasis placed by many on the importance of heritage for economic development. There was a strong sense that more support was required in developing the tourism appeal of heritage, in supporting organisations in reaching wider audiences and in being better at ‘joining-up’ tourism. It came across very strongly that we need to do more to spread visitors more widely and to share our resources in developing packages which appeal to a range of visitors, and which will benefit a number of venues. There was also a lot of attention on the importance of festivals and events.

There was also much evidence of interest in how to reuse heritage buildings, and recognition of the role of heritage in attracting investment. There were some really innovative ideas about how buildings could be re-used to really drive economic development, such as the ‘hotel hub’ idea which came out of Downpatrick. In general there was notable interest in developing better links with the business sector.

- Promote a joined up approach to tourism and visitors – this needs to be done centrally but also at local government level. Encouragement needs to be given to the ‘breadth’ of the sector to work better together, and this includes HED, local museums, hoteliers, restaurants and ‘infrastructure/transport. This probably requires the setting up of local fora – see below.
- Work with Tourism NI in defining our key heritage stories – at the time of writing the new Tourism Strategy has not been published. We know that heritage will be a core ingredient, but we need to clarify the ‘priority’ themes. Tourism NI have published (December 2017) their new strategy to unlock the potential of heritage-led tourism; for this to be successful TNI need to really engage fully with the wider sector.
- Consider ways to have more joint marketing and ticketing – encourage key partners to come together to develop innovative visitor packages. Consideration should be given to ways to encourage visitors to spend more time in currently under-utilised areas, and to make it easier for them to travel across NI. There is an issue at present, with a concentration of international visitors at relatively few locations.
- Encourage events and festivals development which reflect the unique heritage of a place – this could be done through funding provision, or engagement with local government. There are already some very good locally-based festivals which have really contributed to economic development of an area; this may require an overarching Festivals Strategy.
- Consider piloting an idea like the ‘hotel hub’ – this would require some research and a feasibility study.
- Consider replicating festivals like Heritage Week in ROI – HED currently run the very successful EHOD, and this year HLF, HED and TNI are coming together to support European Year of Cultural Heritage.
- Develop links with business – this could be through the development of an advocacy document, or promoting corporate responsibility initiatives; Business in the Community and Arts & Business would be worth engaging.

## 2.2 Progress : Strengthening our Society

The impact on community was probably the most significant reason for the groups in the 5 areas for being involved in heritage. There is a very strong recognition that our ‘history’ is part of our identity, and that heritage is something which connects us, and which can only really be optimised if we can work together.

There was a very strong feeling that we need to be better at developing our networks, and we should not be in competition with one another. It was widely felt that advocacy of heritage was not strong enough, and that Government, local and central, could do more to support the sector. There was recognition too of the importance and potential of volunteering.

- Improve advocacy of heritage and of the sector – this has obviously begun through the coming together of the heritage sector under HED, and the development of the ‘compelling narrative’; the focus should now shift to how we get this core message out, who the key audiences are and how do we continue to develop and deliver the message. There may be merit in the development of a long term ‘manifesto’ for the sector – this would be a strategic document which sets out specific ‘key asks’ on behalf of the sector which would build upon the breadth of opportunities set out in the compelling narrative.
- Develop the core heritage network – the current situation, in which the sector has been brought together under the lead of HED, has worked well, but is very much dependent upon HED and upon the Head of the Division. Steps could be taken to create a ‘forum’ of some description which would reduce the Department’s current level of responsibility. A forum could take a number of guises, but in essence would have more of a shared leadership between Government and the wider sector.
- Work more closely with local government – given the changes in Government in recent years, and the increasing significance of community planning, consideration could be given to developing a more strategic approach to local Government. For example the ‘Treasure’ document could be adapted for each Council, or presentations could be made to each Council on behalf of the ‘forum’.
- Encouraging local networks – the importance of local heritage networks came across very powerfully in the audit process. Consideration should be given to ways to encourage local forums or networks to form. This could be done through local government.
- Make the most of our volunteers – volunteering has lots of potential benefits – for both cash-strapped organisations and well-being of individuals. Some parts of the sector already do this very well. We should look at ways to increase volunteering levels, consider how to extend volunteering responsibilities, and provide better support to organisations right across the sector. An overarching Volunteering Strategy may be useful.
- Support for organisations – of all the potential actions, this is probably the biggest and most complex. There is a very wide range of potential supports which could be made available to heritage organisations. To simplify as much as possible, we have split this into 2 areas – funding and organisational resilience.
  - Funding – a funding sub-group has been set up by the heritage grouping led by HED, and this will make a number of detailed recommendations. Our main findings are that traditional sources of funding for the sector are reducing – government grants, Trust funding etc. Instead the sector really needs to look to other sources such as social finance, legacies and earned income. The sector would benefit from:
    - A one-stop shop source of support and information
    - A tailored training programme which includes bespoke solutions for individual organisations
    - A generally more joined-up and flexible approach to government funding (for example EYCH programme)
    - A joined up approach to accessing finance from new sources, where the sector together seeks partnership funding for specific programmes
  - Organisational Resilience – lack of resource was a repeated issue for organisations. There are a number of actions which could be undertaken to help the sector and its constituent parts become more resilient.

- Social enterprise development – linked to issues around funding and support is the need to develop a more entrepreneurial approach to heritage management. There are a number of examples around Northern Ireland where social enterprise models have been adopted to safeguard and utilise heritage. Both NI Environment Link and the Architectural Heritage Fund have been undertaking work in this area, which could be further developed.
- Shared services – the sector should consider ways to share costs and resources; an organisation could be tasked with researching and delivering a pilot programme
- Skills deficits – one area the audit was not able to fully investigate was the skills/training levels amongst organisations; anecdotally we know that there are skills gaps amongst both the workforce and the Boards. A fairly simple survey could be carried out which would lead to an action plan including specific training. This could include a very wide range of issues from Governance to Financial planning.
- Volunteers – as above, a more strategic approach to volunteering would be beneficial
- Improved networking – as above, the ability of groups to have other organisations to call on for advice and support would be extremely beneficial; there are a number of ‘umbrella-type’ and support organisations connected to the sector such as Ulster Architectural Heritage and Heritage Trusts Network NI, which has recently produced a toolkit for members on all aspects of managing a building preservation project.
- HLF Resilience – it is worth noting that in recent years HLF has put more resource into supporting the development of resilience in heritage organisations. The Catalyst, Transition, and currently ‘Resilient Heritage’ programmes have all been rolled out in Northern Ireland. There may be scope for a sector-based funding application.

### 2.3 Personality : Shaping our Character

While the experience of many of the groups is similar right across the 5 areas, it was also quite clear that each area has a unique range of heritage assets, character and issues. There were considerable differences between each area. In North Belfast there was a very strong emphasis towards community development; in Downpatrick the issue was around tourism and better connectivity; in Fermanagh we were dealing with a very rural community with a dispersed range of assets and very small organisations; in Strabane it was a place which seems to have a wealth of ‘hidden history’; Armagh has a great cultural infrastructure but has not developed a focus or key theme for heritage.

- Targeted product development – linked to tourism, there is a clear need for each area to be able to develop ‘heritage product’ which reflects the local area. For example, in Downpatrick there has clearly been an issue around partnership and networking; the local groups have (at least temporarily) got over this by coming together to develop a ‘heritage and horseracing’ themed event. Of the 5 areas audited, this specific theme could only work in Downpatrick. Achieving this requires a mixture of some of the actions suggested above – creation of local networks, improved advocacy, working with local government etc. It also requires an overall strategic view of heritage development

across Northern Ireland. Key agencies – Tourism NI, HLF, HED, NMNI, and the Councils – could consider a more unified approach, which considers things like:

- Festivals
  - Events
  - Trails
  - Attractions
- Improved protection – for many people working in the ‘heritage profession’, protection of our heritage is crucial. The areas selected for the audit have had very mixed experiences, but all can point to some significant heritage losses in recent years. There are a number of recommendations throughout the audits for actions such as creating a new conservation area, or highlighting a building at risk. The Government Department with primary responsibility for protection is HED; consideration could be given to developing a more proactive approach to community and sectoral engagement in the strategic development of heritage protection.
  - Knowledge dissemination – there are a number of examples in the audits where different areas are wrestling with an issue, which may have already been addressed elsewhere. For example in Fermanagh, there is some discussion around the future development of the workhouse at Lisnaskea. There is already much learning in Northern Ireland about reuse of workhouse buildings – such as Derry’s Waterside, Strabane, Limavady and Belfast. A resource directory, dealing with different aspects of heritage protection, reuse, case studies etc. could be put together as an online resource.
  - Better understanding of the sector – closely linked to the action above, is the need for better data gathering. In order to advocate effectively for the sector, we really need to have better information about it. This could include information on user numbers, volunteers, skills, economic impact etc. This could be carried out through an annual survey.
  - Awareness raising – linked to the data, is the need to simply raise awareness about our heritage and what can be achieved through it. The ‘Treasure’ document is an excellent start, but this will only work if other sectors, and our communities, see this value. There are of course a number of ways to approach this, and could include some of the following:
    - Organise meetings with 3<sup>rd</sup> Sector bodies such as NICVA, Rural Network, Community Foundation
    - Consider a specific campaign which the sector could get behind targeted at the public – there are a number of individual campaigns run by the sector (such as National Trusts ‘Things to do before you’re xx) and a number of Arts campaigns run by ACNI over the years
    - Survey the public – heritage related questions could be circulated through surveys such as the Continuous Household Survey

## *Conclusion*

The Heritage Sector has gone through a period of massive change and expansion since the creation of the Heritage Lottery Fund in 1994. As well as dramatically improving our opportunities for better preserving our heritage, HLF has also been instrumental in changing how we think about heritage.

Who is it for? Why do we want to preserve it? What can it achieve? Today, there is a completely different mind set in terms of how we talk about and advocate for the value of heritage.

This is clearly set out in the 'Treasure the Past; Enrich the Future' document. For heritage to continue to grow and develop our focus needs to further shift. We need to support the heritage sector itself, but we also need to make connections across society, showing how heritage underpins and connects with a whole range of sectors. Our learning from the heritage audit process and review of the Catalyst programme confirms the types of interventions that we need.