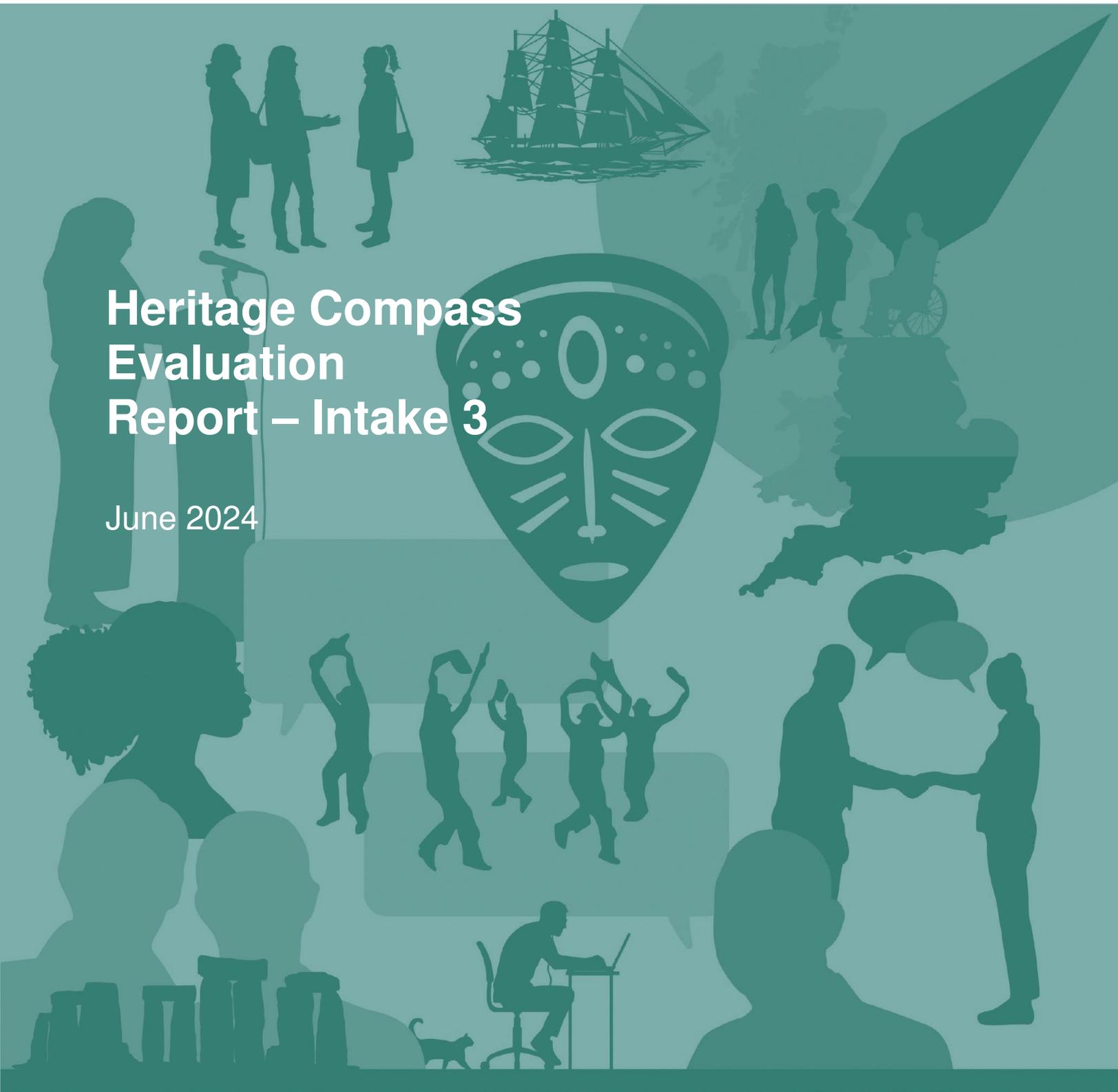




# Heritage Compass Evaluation Report – Intake 3

June 2024



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## Executive Summary

The Heritage Compass programme was a Business Support Programme, for small and medium-sized heritage organisations across England to develop skills in business planning, audience development, leadership and change management. The aim of the programme was to create a better connected, informed and resilient heritage landscape across England.

Funded by the National Lottery Heritage Fund, the programme was led by *Cause4*, and delivered with support from the Arts Marketing Association (AMA) and Creative United. The programme originally aimed to work with 150 organisations; however, due to the impact that Covid-19 had on the sector, National Lottery Heritage Fund and the Department of Culture, Media and Sport extended the programme, awarding *Cause4* additional funding in February 2021 to provide support to up to 300 organisations (an additional 150 organisations) in total. In April 2022, the programme was extended even further, with an opportunity to support up to 100 additional organisations.

This evaluation report looks at the experiences of the final cohort of organisations, as well as reflecting on case studies of organisations from previous cohorts, and exploring the impacts of additional funding for grassroots networks, Strategic Support Resilience Grants and a Guided Strategic Training Programme. Overall, this phase of the programme delivered:

- **33** training sessions across **6** modules, delivered by **7** specialist trainers
- Critical friend and mentoring relationships for participants
- A final online symposium with **98** participants
- Strategic Support Resilience Grants, awarded to **34** organisations with a total of £150,000 given.
- The guided Strategic Training programme which supported **19** organisations.
- **6** Networks supported by a Grassroots Network Grant to run their own training, networking events or development activities, reaching out to and supporting organisations and individuals beyond the core Heritage Compass programme.
- A final Reflection Day, which included input from the delivery team, Evaluation team, **2** critical friends, **4** participating organisations and National Lottery Heritage Fund staff.

As with previous rounds of the programme, many participants were focused on developing business plans and income generation strategies particularly and wanted to address challenges in their financial resilience. Participants also wanted to upskill workers and volunteers, to build their confidence, addressing the challenges of the resilience of the people in their organisations. They also wanted to make connections with other heritage organisations. Bursaries have been crucial in supporting many organisations to take part in the programme, typically helping organisations to backfill roles, or buy additional time from freelance or part-time workers.

Participants report finding training accessible, materials and resources of a high standard and sessions well-organised and managed. Training was also widely felt to be relevant to organisations and individuals, was pitched at the right level and met the expectations of participants. The quality of trainers and facilitators was felt to be high, and feedback shows that participants found difficult topics were introduced in a friendly way.

Across the programme, we found that participants were learning a range of new things. This included new tools and techniques and a clearer understanding of what best practice looks like. Several participants joined Heritage Compass with the intention of reviewing their governance

or organisational structure, and there is evidence that organisations have learnt what good governance looks like, and of participants actively exploring through the programme a range of models and approaches to governance and organisational structures. Participants have also learnt about the value of good data, including financial and management information and audience data. Several participants have engaged in the Heritage Dashboard, which provides organisations with financial benchmarks on comparative organisations.

As a result of the programme, and particularly the support of critical friends and mentors, participants report being confident to take away what they have learnt back to their organisation and being prepared to do things differently. Some participants report significant internal change as a result of their participation in the programme, being underpinned by the new skills and knowledge which they have gained in Heritage Compass. Sharing new learning within organisations, and across the sector, has been key to participants enhancing the impact of the programme, and it is clear that Heritage Compass has delivered skills development within the sector.

Participants have also made valuable connections with each other, and in some cases more widely through critical friends and mentors, widening their networks and opportunities to learn from, and engage with, other heritage organisations. Network support has also come through the Grassroots Network grants, which has enabled organisations to work together in building fundraising knowledge and capacity, reviewing network governance approaches and purpose, and providing new networking opportunities, including the development of new partnerships and strategic approaches. For small organisations, the development of networks is key to their future resilience, supporting wider ambitions and enabling skills development and planning which could not otherwise take place.

Many organisations reported taking significant steps within the period of the programme, upskilling trustees and putting in place new trustee recruitment processes, developing business plans and revising mission statements. For several participants, a common element has been making space for more strategic thinking: running board away days or visioning sessions, taking stock and widening ambitions in their planning for the future. In doing so, organisations are beginning to address the question of the resilience and relevance of their mission, alongside their financial resilience.

Where organisations have worked on audience development, many began with gathering data on their audiences and beginning the work of building a clearer picture. Participants that received Strategy Support grants moved forward to develop approaches for targeting specific groups, and there are also Grassroots Network grantees which used their funding to explore collective approaches to targeted audience development. Taken together, we can see a commitment to, and significant planning for, heritage organisations getting a wider number of people involved in heritage.

Practically, there is evidence of successful funding applications and of new income streams which have been significantly supported by the advice and guidance given on the Heritage Compass programme. In some cases, this has been particularly supported by participants going on to gain Strategic Support Resilience Grants and working with expert consultants to develop fundraising bids and approaches, and by the Guided Strategic Training, which enabled organisations to progress their work on income generation to the next level. These new areas of income generation support the greater ambitions for the resilience of organisations, and to their potential to contribute to the local economy.

A major challenge for participants in applying the learning from Heritage Compass is the capacity of organisations, particularly when faced with the challenges and complexity of organisational change. Many of the organisations involved in the programme are small-scale, and often volunteer-led; getting the right mix of skills from trustees and volunteers, and the necessary capacity, has been challenging. The additions to the Heritage Compass programme in this last phase, with individual grants, network grants and strategic guided training, have helped to bridge that gap for some organisations, enabling them to move forward with their plans.

As a result of participating in the Heritage Compass programme, we can see that organisations:

- Have a better understanding of the changes they need to make and have started on the journey to that change.
- Recognise the relationships between financial resilience and people resilience (capacity and skills), and between financial resilience and mission resilience (the relevance and relationships at the heart of their activities).
- Have developed a range of plans and actions for the future, and that in many instances work has already begun on implementing these plans.
- Have successfully raised funds and income from new sources, to support their ambitions.

Key learning for future business support programmes includes:

- The importance of bursaries or other mechanisms to allow staff and volunteers in very small organisations to participate in the programme.
- Organisations begin from different starting points, and this affects not only the progress they make, but also their ability to engage significantly in a business support programme.
- The critical friends and mentors have been crucial in helping participants turn knowledge (from training and other resources) into skills, and applying those skills in the specific context of their organisation and the challenges and opportunities they face. The Strategic Support Resilience Grants and guided Strategic Training have built on these relationships, enabling organisations to access the resources and develop deeper understanding and capacity in the areas they really needed it.
- The length and intensity of the programme has helped organisations make space to think strategically, to move beyond the day-to-day and consider their mission and purpose, and what is required to achieve their ambitions. This has been fundamental in underpinning successful grant applications and income generation, and in supporting wider business planning.
- Small organisations gain significant benefit from building networks, and from some of the things that networks allow them to do – e.g. sharing training and development opportunities – that they cannot do alone. This programme provided crucial funding, which is not otherwise widely available for networks.

## 1 Introduction

The Heritage Compass programme was a Business Support Programme for small and medium-sized heritage organisations across England to develop skills in business planning, audience development, leadership and change management. The aim of the programme was to create a better connected, informed and resilient heritage landscape across England.

Funded by the National Lottery Heritage Fund, the programme was led by *Cause4*, and delivered with support from the Arts Marketing Association (AMA) and Creative United. The programme originally aimed to work with 150 organisations; however, due to the impact that Covid-19 had on the sector, National Lottery Heritage Fund and the Department of Culture, Media and Sport extended the programme, awarding *Cause4* additional funding February 2021 to provide support up to 300 organisations (up to 150 additional organisations) in total. In April 2022, the programme was extended even further, opening the programme up to an additional 100 organisations.

DHA were commissioned in October 2020 to undertake the evaluation of the programme, including evaluation of this additional round of support.

The Heritage Compass programme addressed several issues for small and medium-sized heritage organisations, including the skills gap and absence of specialist knowledge in areas such as business planning, fundraising and income generation, governance and leadership. The programme involved a range of activities and resources, including:

- 6 training courses in: fundraising, governance, business planning, financial planning, earned income and audience development
- Annual Symposium days in which case studies, good practice and examples of learning were shared
- Access to e-Learning opportunities
- A critical friend
- A personal mentor
- Access to a newly developed dashboard benchmarking the financial makeup of small and medium-sized heritage organisations

In addition, this iteration of the programme also included:

- Funding for grassroots networks of heritage organisations, groups and projects to run their own network or training event, to explore local challenges and collaborate with others.
- Funding for individual organisations to use to develop their organisational resilience, enabling them to utilise the funds to support staffing capacity, business planning, or fundraising.
- Strategic guided training for organisations to learn and develop their own forward plans, focusing on business planning, fundraising strategy, audience development and earned income.

Applicants to the programme were asked to identify priorities for development from the following list:

- A developed or re-invigorated Business Plan
- More effective governance and financial planning
- Create a process to manage internal culture change

- Develop or re-invigorate its income generation strategy
- Develop or re-invigorate its audience development plan
- Gain an understanding of how to use benchmarking to inform decisions
- Create an improved network and increased confidence

Recruitment took place in Autumn 2022 and was open to 100 additional spaces in total. 6 grassroots networks were funded, 19 organisations participated in the guided strategic training programme, and 34 organisations were awarded a Strategic Support Resilience Grant.

This report looks at what participants needed and wanted from the programme, how they engaged with the programme, what their experiences were and where barriers and access challenges arose. It also examines what we know about their progress towards the outcomes listed above, and their plans for the future. It is supplemented by a series of case studies, which look at participants across the different cohorts, including returning to some participants who engaged in earlier cohorts.

## 2 The Evaluation

The evaluation of the Heritage Compass programme is underpinned by a Theory of Change and Outcome Framework which are set out in the Interim and [Final](#) reports for the main body of the programme. This report seeks to add to this thinking by modelling the process which we have seen participants work through. It also identifies the key challenges that the sector is facing, as well as what support the sector needs next.

### 2.1 How we collected data

This evaluation draws together data from a number of key sources, as follows:

#### 1. Application Forms

Participants applied to take part in the programme, to gain access to grassroots network funding and to receive strategic support funding. All application data has been reviewed by the Evaluation Team, particularly to understand which needs the applicants wished to address, and which outcomes they were seeking from potential engagement.

#### 2. Basic Data

*Cause4* is the leading delivery partner for the programme and collected a range of data including: attendance figures for different elements of the programme, the number of critical friend hours completed, and other key output data. This data provides a useful indication of the size and scale of activity and engagement across the programme.

#### 3. Feedback surveys

Following individual elements of the programme, like the training modules and Symposia days, participants were invited to fill in short feedback surveys which asked them about their experiences of accessing the programme element, their views on the relevance and pitching of the programme, their sense of the trainers and speakers and their initial sense of whether they were learning new things.

On the whole, feedback surveys have had varying response rates, from around a fifth, to almost half of respondents completing the surveys. They are, therefore, a snapshot of views from participants. Responses from feedback surveys have reflected both positive and negative experiences, and therefore do provide a range of opinions and views across the participants.

#### **4. Learning Journals**

The Learning Journals are the primary source of additional data being collected for the evaluation. Conscious of the limited resources and time pressures on many participants, we wanted to collect data in a way which also supported participants in their learning and reflection. In order to achieve this, the Learning Journals were connected to the critical friends' process. Each organisation received six sessions with a critical friend and, in the opening and closing sessions, participants were asked to complete a Learning Journal entry which comprised a range of information and reflections, including:

- What they had engaged with as part of the programme, and any barriers to engagement
- What they had learnt, how confident they felt in applying the learning and what the barriers might be to taking the learning back into their organisations
- What outcomes they wanted to work towards as part of the programme, and whether they felt they were making progress

The Learning Journals provided an opportunity for reflection across the programme elements and therefore sat alongside data from the feedback surveys, enabling us to understand how well programme elements worked for participants. Learning Journals were also the key way that participants could tell us about how they were taking learning from the programme back into their organisations/projects.

Over this round of the programme, 33 organisations completed and returned at least one Learning Journal entry, and 31 of these completed all or almost all of the two Learning Journal entries. Tying the Learning Journals to the critical friend process appears to have been beneficial, both for the response rate – which is higher than that of any of the open feedback surveys – and the quality of reflection, which has been significant particularly for those who completed both entries.

#### **5. Reflection and thinking ahead**

The Evaluation Team supported discussion sessions in the online Symposium Day. The Team also facilitated a smaller group reflection day, covering a range of relevant topics, which included delivery team members, participants and staff from the National Lottery Heritage Fund.

#### **6. Case Studies**

We have updated four of the case studies from the Final Report of the main Heritage Compass programme, which gives us a longer-term look at how organisations have progressed following participation in the programme. These are supplemented by three additional case studies which include one participant from the final round of the programme and two participants from earlier cohorts that received grassroots network funding and, in one case, also participated fully in the Heritage Compass programme.

## 2.2 Outcomes Framework and Resilience

As part of the evaluation of the original programme, we developed a Theory of Change and an Outcomes framework against which data could be analysed and understood. These are set out in the Interim and [Final](#) Reports from that evaluation and are referred to in the conclusions of this report.

### 2.2.1 Understanding Resilience

Throughout the evaluation of the main and extension programme, the Evaluation Team was asked to consider how we might understand the idea of ‘resilience’ and whether the Heritage Compass programme was helping organisations and projects to build their resilience.

To support this, we reviewed a range of material about resilience, including:

- [National Lottery Heritage Fund’s Organisational Resilience Guide](#)
- [Heritage Fund’s ‘Resilience Heritage Strength Checker’](#)
- Arts Council England-commissioned study [‘What is Resilience Anyway?’](#)

What we identified across these sources was that the idea of resilience often went beyond a healthy balance sheet. We grouped together a range of factors identified in the literature and thinking about resilience, to form three linked ‘types’ of resilience, as follows:

#### 1. Financial Resilience

Reflecting a range of financial factors and indicators, including the range, diversity and sustainability of income streams and the quality of oversight and understanding.

#### 2. People Resilience

Reflecting the range and depth of workforce, volunteer-force and governance, including skills, capacities and circumstances.

#### 3. Mission Resilience

Reflecting the clarity of vision and purpose and an organisation’s relationship to the communities or groups that it wishes to engage.

The following page models these factors. Throughout this evaluation report we have used this model of three linked areas of resilience to understand what organisations wanted from Heritage Compass and how the process has affected their ability to address questions of resilience.



### 3 Recruitment

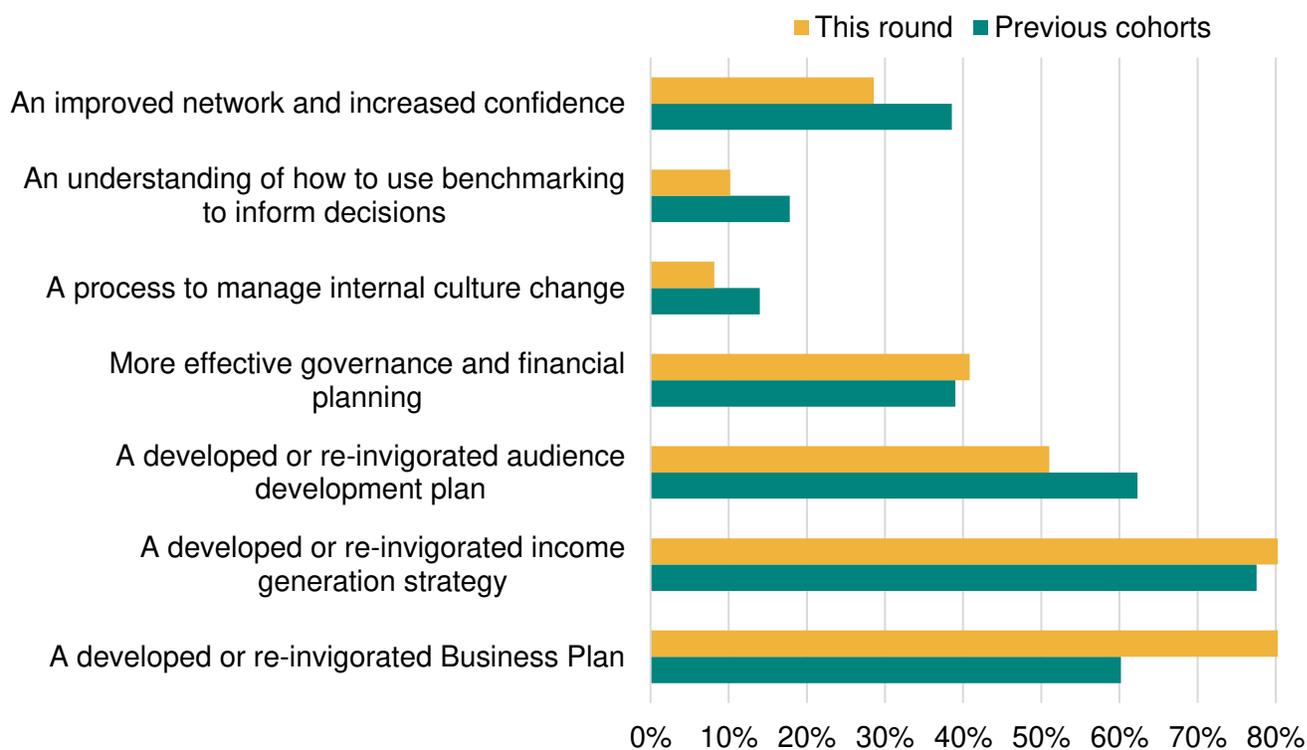
This round of the Heritage Compass programme was open to a further 100 organisations; 49 made successful applications.

#### 3.1 What did they need to get out of the programme?

Applicants were asked to choose up to three outcomes from a list, identifying those which they felt were the priorities for them to work on through the Heritage Compass programme.

The graph below demonstrates that the participants in this round, on the whole, chose a similar balance of priorities to those in previous cohorts. The greatest difference is in the proportion of participants who chose 'a developed or re-invigorated business plan', which is particularly high in this round of participants.

Figure 1: Programme participants by most important outcomes



Source: applications to the programme.

Applicants were asked to explain why they were applying to the programme, what they hoped to achieve and how they thought that the programme would benefit their organisation. Several describe the programme as being important because it coincided with the organisation being at a specific point in its development, for example:

- Capital works being undertaken
- Changes in the leadership team and/or governance or membership structure of the organisation

- Changes to a larger structure (e.g. local authorities) which the heritage activities are a part of
- Very small organisations or projects seeking to transition to more sustainable models of operation
- Volunteer-led organisations, professionalising their operations
- Organisations preparing for major funding applications to the National Lottery Heritage Fund, or another funder
- Addressing significant challenges, including rising costs and crumbling buildings and assets

Some organisations also reported having made plans for change pre-pandemic and finding that during the pandemic those plans had stalled; Heritage Compass was seen as a way of restarting these plans or resetting where plans needed to change.

Compared to previous cohorts, applicants for this intake talked more about resilience and the need to build resilience. This often meant financial resilience, with applicants seeking to diversify their income streams and activities, and to put plans together to place their organisations or projects on a more sustainable footing, for example:

‘As a new, small charity, much of what we do is unpaid - many commissioners are reluctant to pay for indirect costs / management fees. This means that it is difficult to generate financial support for project facilitation / support of project development. Obviously, this means that it is difficult to maintain our work without a more concerted funding strategy informed by realistic business planning.’

‘The Programme will build the necessary skills for us to ensure profitable engagement with donors and investors, knowing that the organisation offers excellent value and long-term resilience. We must demonstrate our ability to adapt and diversify our revenue.’

‘People love it but with pressure to keep prices low it’s a high volume business with very high staff costs and high fixed costs and the right decisions need to be taken at this point to survive. A revised and bold business plan, which builds on the learning and experience we now have of our customer base, stakeholder priorities and the limitation and opportunities of the space we have, needs to be devised, planned out and delivered.’

Alongside this, many applicants stressed the need to develop the skills of staff and volunteers, including trustees, and to try and make space for the kind of thinking which activities like business planning required. These needs reflect the challenges which very small organisations face, for example:

‘Between fellow [colleague] and myself, there are many skills and many skill gaps. I am HR manager, finance manager, bid writer, funding manager, project manager, stakeholder liaison and event coordinator. I’ve had an operations heavy day to day role, plus working in the café and bar week in week out to cover shifts. I often feel out of my depth, as I’m spread so thinly across too many areas of work. Time to reflect and plan is vital and support to both create the space and time, and also to reflect on priorities would really help both with my personal development and the development of the organisation.’

'...we need to upskill our administrator. She works 2 days a week, alone, and would benefit hugely from sector-specific training and working alongside a trustee.'

'I am applying to be part of the programme, as I wish to further develop skills in business planning, for which I have very limited understanding...To help us grow further and to encourage people to attend our workshops, we need a better understanding of audience development...Having had no training in any of the skills you outline in the programme, another one I would be keen on is understanding more about leadership.'

'We are an emerging organisation that has evolved through the efforts of a small number of people with lived experience of [specific circumstances]. While our Board and Leadership team hold invaluable skills and experience that has progressed our project until now, we are aware that the next phase of our development will require new and deeper skills in areas where we currently identify gaps in internal knowledge.'

In addition to this, some applicants were also thinking deeply about the future of their organisation, for example:

'In order for the museum to survive, it needs to be proactive rather than reactive. We need to continue to develop our skills, learn from others and not be afraid to try new things. It is important for the museum to be seen to be forward looking and show our supporters that we are a museum that wants to grow, has something relevant to offer and can change with the times.'

'This programme will provide us with the opportunity to develop our understanding of what needs to be done to move us into a new resilient place, with an enhanced vision, purpose, and to provide an opportunity for us to talk to other organisations that have or are trying to do something similar. Our future as a Trust depends on us developing our offer without compromising our original purpose and vision. We must become far more resilient to change and open to new ideas, relevant and engaged with the local community.'

Finally, several organisations talked about the value of learning from others, building networks and engaging with peers. Some heritage organisations reported feeling isolated, and saw the programme as an opportunity to make meaningful connections:

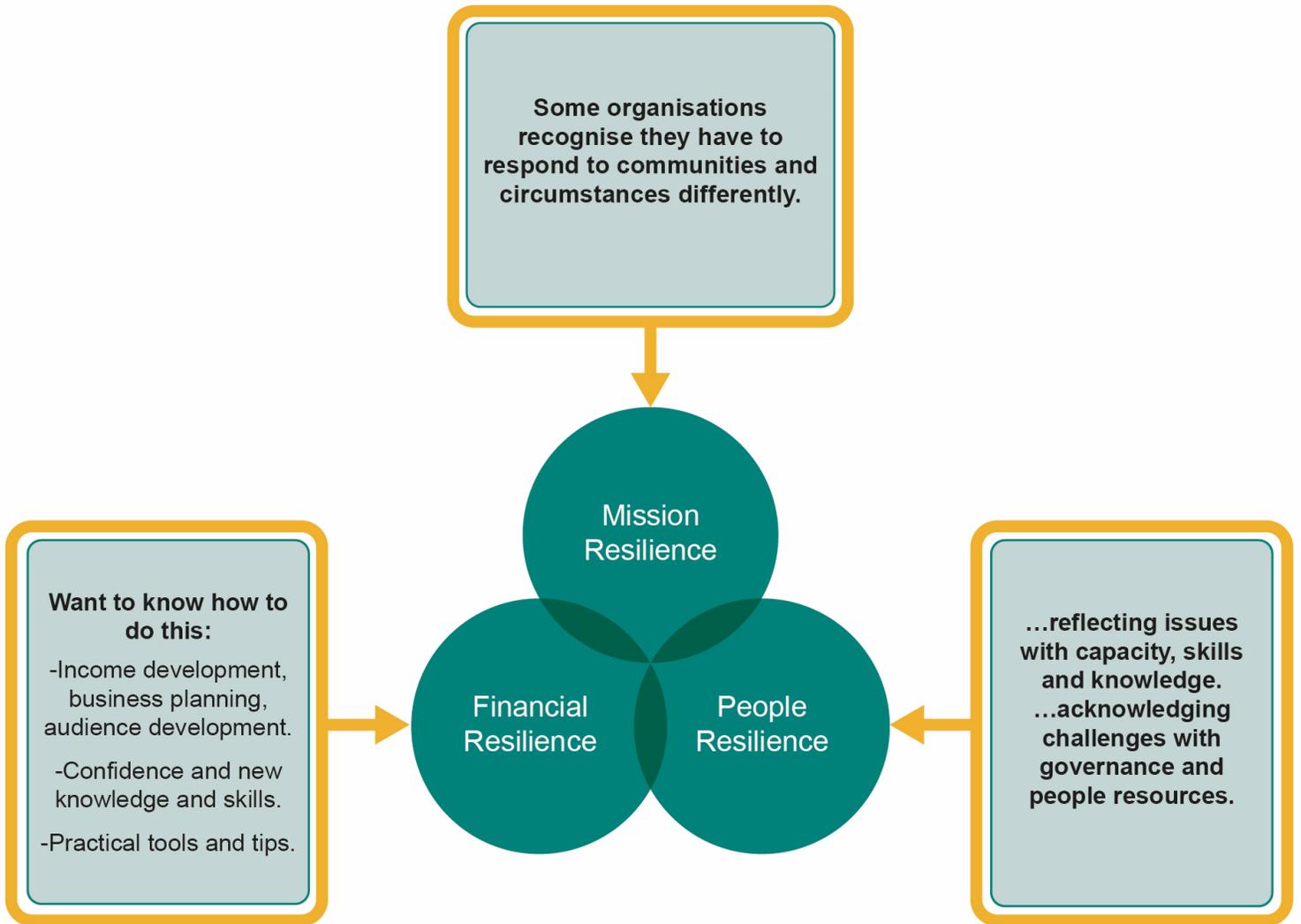
'We don't know many heritage practitioners beyond our local area. We are the only heritage project supporting [specific community of] people and we definitely don't have connection to a network of practitioners who support similar communities to us. We would love to learn from other people who have been doing this work longer than we have and can share best practice. We think our CIC will thrive from being on a programme with access to such a large and diverse group of people.'

Participants were asked to set out their aspirations for the programme within the first Learning Journal. Responses were generally in line with the content of the application forms as described above, and highlighted:

- A desire to build networks. This was broadly expressed as a desire to make contact with organisations with similar challenges; however, a very small number of programme participants from start-up heritage organisations came in with specific goals around identifying organisations they could approach to work in partnership.

- A need to come away with practical, actionable 'tips', as well as a broader understanding of the principles of strategic planning, fundraising and income generation.
- Support to improve governance and create meaningful culture change within their organisations.
- A need to find ways of working within the available capacity of their organisations and to make decisions about organisational structure.

Returning to the model of 'resilience' described in section 2.2.1, the model below reflects what organisations felt they initially needed from the Heritage Compass programme.



### 3.2 What did they need in order to engage with the programme well?

As part of the application process, participants could apply for a bursary of up to £1,000 to support their participation in the programme. 19 organisations applied for a bursary (39% of successful applicants); this is a lower proportion than was the case in previous rounds of the programme. The majority of bursary requests were for the full amount, but six organisations requested less than £1,000 (all sought more than £500). Typically, organisations sought to use the bursary to cover staff and volunteer time costs, either by backfilling staff, or by covering staff time which would otherwise need money to be raised to cover it. Some organisations also had very specific requests, such as using the bursary to support travel costs to enable staff to network or to support childcare costs.

As with previous rounds, it is clear – particularly for very small organisations where paid staff are at a minimum, or where organisations are run on a mixture of some paid staff and significant volunteer time and input – that the bursaries are making participation in the programme possible for organisations which would not otherwise be able to engage fully, or at all.

### 3.3 Programme delivery and engagement

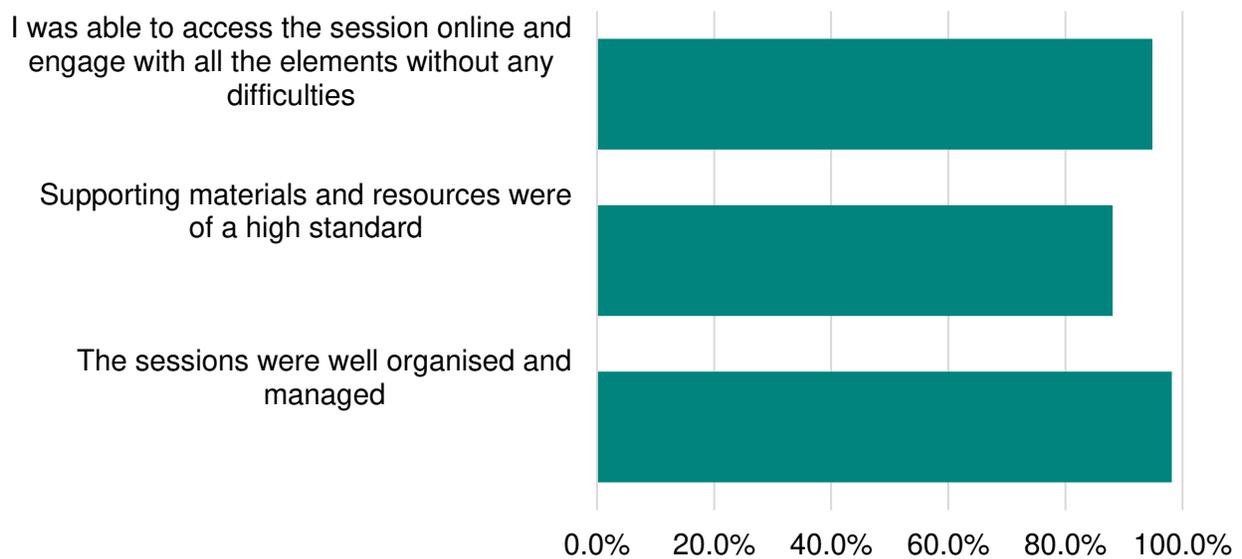
The Heritage Compass programme had several elements, including training modules, events like the Symposium days, access to critical friends and mentors and more informal resources like a Slack channel. This round of the programme has included:

- **33** training sessions (amounting to **169** training sessions across the entire Heritage Compass programme), across **6** different modules delivered by **7** specialist trainers:
  - The Fundraising module had **82** attendees across 6 sessions (totalling **547** attendees across 30 sessions for the whole of the programme).
  - The Business Planning module had **35** attendees across three sessions (**338** or more attendees across 27 sessions for the whole of the programme).
  - The Governance module had **73** attendees across 6 sessions (**410** or more attendees across 30 sessions for the whole of the programme).
  - The Cash Management and Forecasting module had **69** attendees across 6 sessions (totalling **372** or more attendees across 30 sessions for the whole of the programme).
  - The Earned Income module had **66** attendees across 6 sessions (totalling **319** or more attendees across 30 sessions for the whole of the programme).
  - The Audience Development module had **50** attendees over 6 sessions (totalling **668** or more attendees across 22 sessions for the whole of the programme) offering both introductory and masterclass level workshops.
  - Some additional training courses offered training on Governance and Individual Giving and were attended by **34** participants.
- **222** Critical Friend pairings and **207** mentoring relationships have been established for all cohorts, with **1437** hours of critical friend support and **1454** hours of mentoring support provided
- The final online Symposium day took place in January 2024 and had 98 participants.
- Strategic Support Resilience grants were awarded to **34** organisations, with a total of £150,000 given.
- The guided Strategic Training programme supported **19** organisations.

- **6** Networks were supported by a Grassroots Network grant to run their own training, networking events or development activities, reaching out to and supporting organisations and individuals beyond the core Heritage Compass programme.
- The final Reflection Day included input from the delivery team, Evaluation team, **2** critical friends, **4** participating organisations and National Lottery Heritage Fund staff.

Figure 2 below sets out feedback survey responses which tells us about participants' experiences of accessing and engaging with the training modules.

*Figure 2: Participants' experiences of accessing and engaging with training modules, net agreement*



Sources: All training course feedback surveys, 111 respondents

The score presented in the graph is 'net agreement': that is, looking at all those who mostly or completely agreed with a statement, and subtracting from this score all those who mostly or completely disagreed.

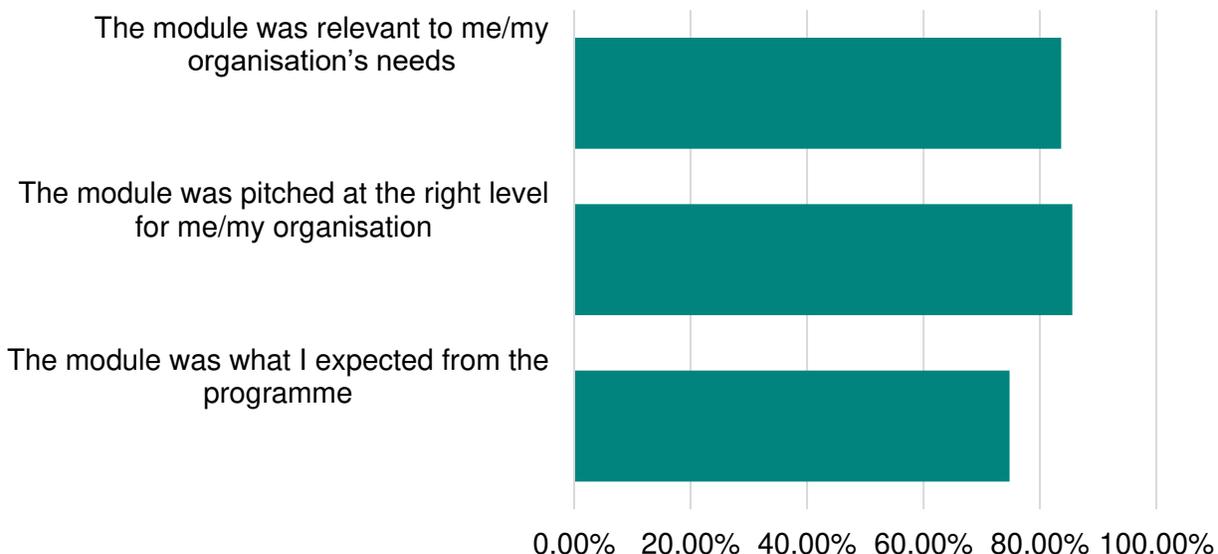
Respondents gave very high net agreement scores with the statements about the organisation and management of the modules, the quality of materials and resources, and online access. These are very similar to the scores given in feedback surveys for previous rounds of the programme, suggesting that there has been a consistently high quality of delivery.

Looking at open-ended feedback, there were a few respondents experiencing brief difficulties with technology, but fewer than in previous iterations of the programme.

### 3.4 Relevance and quality of the programme

Across the different feedback and reflection routes for participants, we asked them to tell us whether parts of the programme – and the whole programme – met their expectations and whether they were finding it relevant and pitched at the right level for them and their organisation or project.

Figure 3: Participants' expectations and perceptions of the relevance of the training (shown as net agreement)

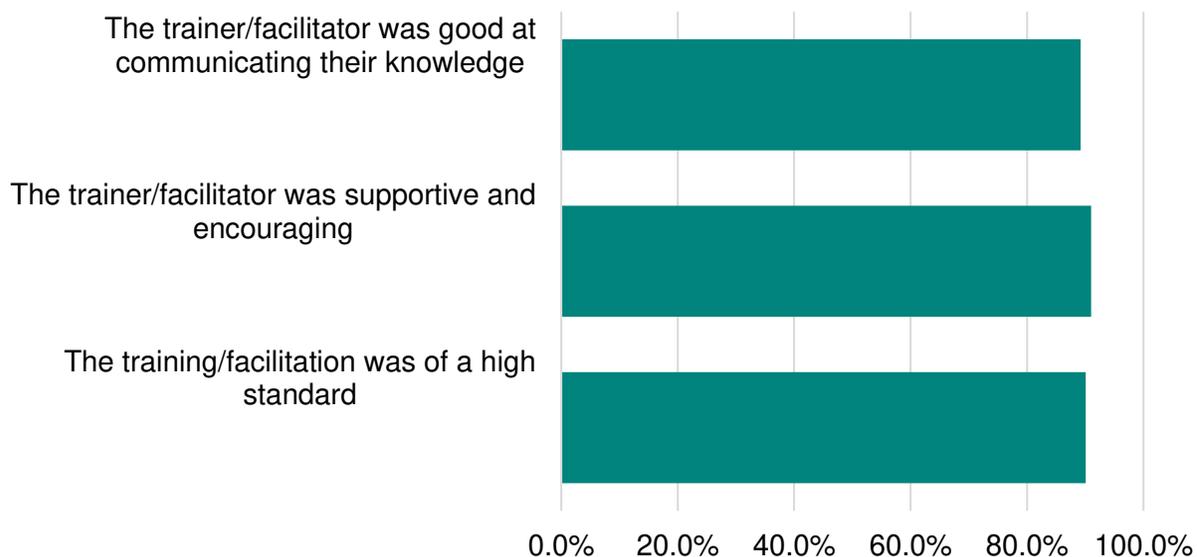


Sources: All training course feedback surveys, 111 respondents

Overall, the training courses received excellent scores for their relevance, pitching and meeting participants' expectations. These scores are very similar to those for previous rounds of the programme. As with previous rounds, there is some variation between different modules. Typically fundraising, earned income and cash and forecasting modules gained the strongest scores, whilst audience development was the module for which the largest proportion of survey respondents disagree that the module is what they expected. This is also true, although to a lesser extent, when we look at how well the modules have been pitched or are felt to be relevant.

The Learning Journals asked participants how relevant they were finding the overall programme. In the early stages of the programme, 45% of participants suggested it was 'very relevant' and 48% 'quite relevant'; this rises to 58% very relevant and 35% quite relevant at the end of the programme.

Figure 4: Participants' perceptions of training/facilitation, (net agreement)



Sources: All training course feedback surveys, 111 respondents

As with scores from the previous rounds of the programme, respondents were extremely positive about the training and facilitation they received in all the training modules. The lowest net agreement rate is 89%, and more than 75% of respondents 'definitely' (rather than 'mostly') agree with all the statements.

In the feedback surveys for different modules in the programme, we asked respondents to tell us about the most and least useful or interesting things from the different training sessions. Some respondents felt that everything was useful. Many identify specific tools or approaches, including:

- Ansoff Matrix
- Risk Register
- Big Hairy Audacious Goals
- SWOT to TOWS
- Case for Support
- Cashflow Template

Beyond this, participants appreciated the practical examples which were offered, the fact that trainers had significant on-the-ground experience, and the range of useful resources which some modules signposted them too. They also appreciated break-out groups, and the opportunity to talk to and hear from other participants.

Some participants felt that parts of modules covered material they already knew, or in other cases wanted more specific or in-depth information about particular things; this reflects more generally the pattern that we have seen in previous cohorts, where participants approach the training courses from different starting positions and levels of experience and knowledge.

The pacing and volume of information worked well for some participants; however, for a minority, there was too much information in the allotted time.

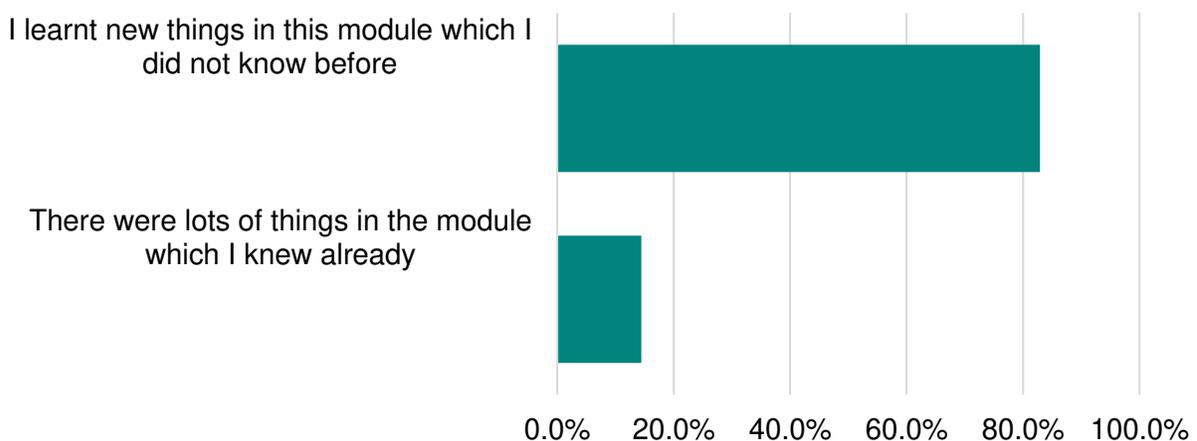
## 4 What are they learning?

### 4.1 Learning new things

As we found in the evaluation of the first two intakes from the Heritage Compass programme, the responses in the Learning Journals clearly show that participants are learning new things as a result of the programme. This learning is also being practised and embedded, supported by participants' relationships with their critical friends and mentors. Some participants in the training are being introduced to new concepts and new ways of approaching regular tasks. Others are finding the sessions useful as a refresher, or as a way of confirming what they have learnt through their hands-on experience of heritage management.

In the feedback survey from the training modules, we asked participants to tell us about their experiences of learning, focussing specifically on whether they were learning new things.

Figure 5: Participants' experiences of learning across the programme (net agreement)



Sources: All training course feedback surveys, 111 responses

Looking at all the training courses combined, respondents gave a net agreement of +83% (slightly higher than was the case for earlier rounds of the programme) that they learnt new things in the module which they did not know before. Looking across the different modules, this was particularly true for those participants on the Governance and Earned Income modules.

Across all these learning scores in relation to learning new things, more respondents 'definitely agreed' than 'mostly agreed' – a strong sign that the programme has introduced participants to new ideas, approaches and information.

### 4.2 Tools and Techniques

As with previous cohorts, it is evident from the Learning Journals, that those attending courses are picking up specific knowledge and tools which they are taking back to their organisations and using to change the way they go about strategic planning. This was described in detail in the [Final Report](#) evaluating previous cohorts, and has remained consistent. This is happening across all the areas covered by the training courses: fundraising, business planning, earned

income development, and audience development. In some cases, organisations are focusing on a priority area for planning and development:

'From the cash management and forecasting I intend to implement the advice around creation of risk registers, KPI Index and to plan more data driven (rather than idealistic) decision making.'

'My main takeaways were the need to produce a Case for Support and what it should contain.'

'Audience Development – I've been given some really useful advice in terms of our current plan on how to make this more sustainable and how to make the outcomes SMARTer.'

In other organisations, participants are taking and applying all that they have learned across their organisation:

'We have already applied the SWOT analysis and other techniques to work on a new strategy. The guidance on how to structure the resulting business plan has helped us progress further than with previous attempts. Work on the business plan is now underway. Priorities within the strategy include expanding our income streams and realising our audience potential. We expect to use the tools learnt to give us a balance of risk and opportunity in raising funds and/or earning income alongside work to characterise and serve existing and new audiences. In other words, we are, and expect to, apply many aspects of the programme because they were so relevant to our needs and state of development.'

### 4.3 Understanding what best practice looks like

We can see from the Learning Journals that the learning which is happening on the programme goes beyond a knowledge of how to use specific tools and approaches to planning. By taking part in all of the training sessions, the programme as a whole is enabling participating organisations to develop an understanding of what a well-run heritage organisation looks like, including what foundation it should have in place to support good decision making and enable it to meet its strategic aims. For the small and medium-sized organisations on the Heritage Compass programme, which have often grown from a project or campaign and have either limited numbers of or no paid staff working at a strategic level, the programme has provided useful insight relating to what a functioning and well-run organisation has in place.

As a result, feedback from the Learning Journals shows that Heritage Compass is supporting the professionalisation of participating organisations. They are recognising the need to have specific plans, documents and policies in place as a foundation for decision-making and understanding the importance of demonstrating to stakeholders and funders that they are effectively managed. The specific actions taken in response to this growing awareness of 'what good looks like' vary from organisation to organisation. They include work on risk registers, cashflow forecasts, and KPI targets:

'This has really helped me to think about what I do in a much more business like fashion.'

'Knowing what the Board should be doing has given me much more confidence to ask them to do it.'

'I have a far better idea of what a business plan should look like, have identified gaps in ours, what needs to be reviewed and/or added/amended and understand how to strengthen it.'

In some cases, this is happening for the first time, whether in new organisations or in those which have been able to get by without strategic thinking but are now facing new external challenges which require them to make changes.

'Before we started the programme, we had no business plan or strategy to speak of. We could plod on as we have for the past 20 years, but many external opportunities have emerged recently that require us to respond by considering change and development if we are to take advantage of them.'

Where organisations struggled to apply this learning because the models used in training did not feel relevant to their situation, they were able to work with critical friends and mentors to adapt them and make them relevant to their situation.

#### **4.4 Governance and organisational structures**

In this cohort we see several organisations who have joined with the intention of considering their governance structure. This varied widely, from an organisation in the process of spinning out from being a project situated within a university, to a freelancer trying to decide whether she should form a CIC to pursue her goals. Other participants had identified that their board was not functioning as it should, for example, a board which was failing to engage with the charity, and one where a particular individual was thought to hold too much sway.

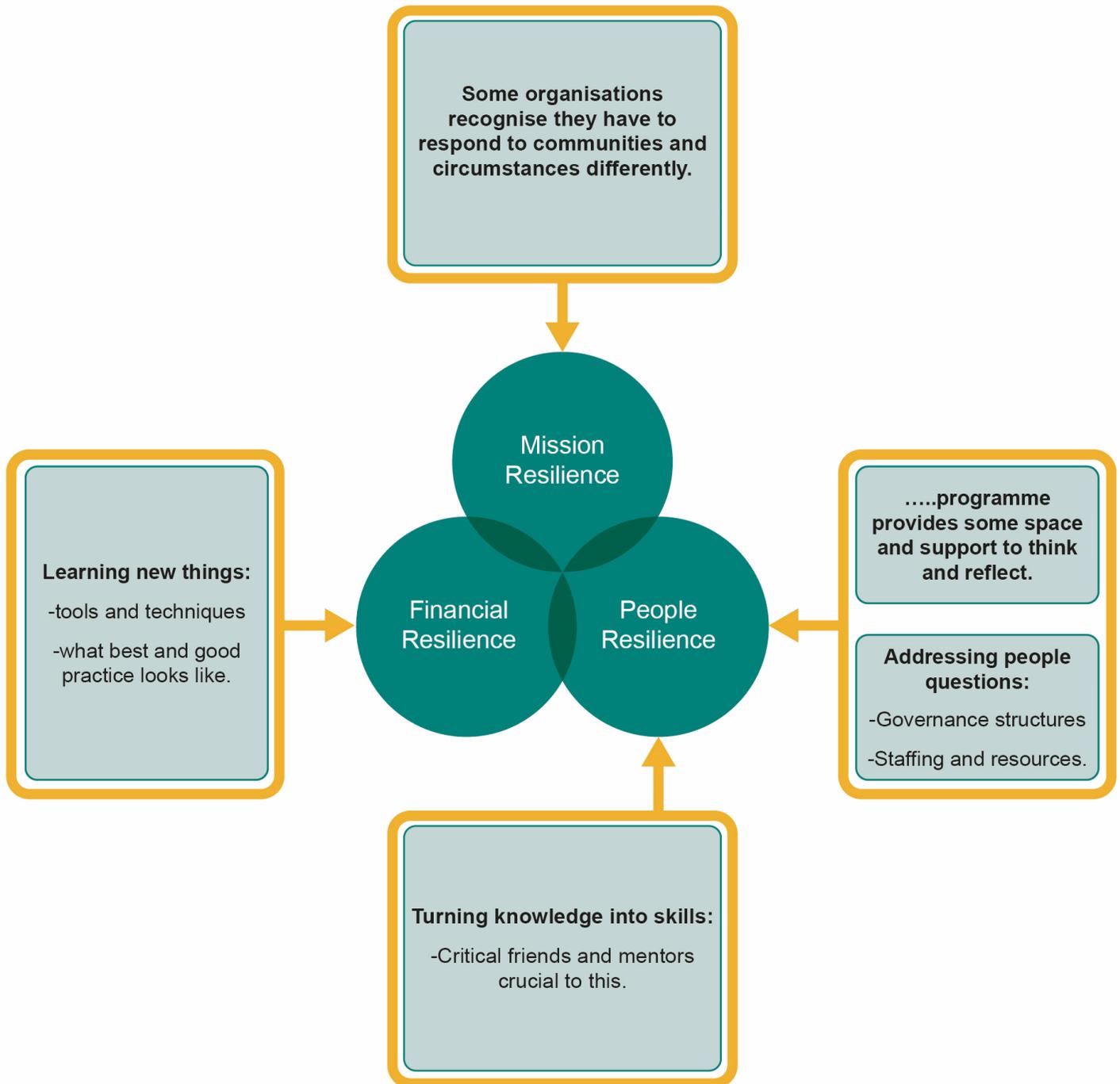
'There has been little or no effective management for a number of years, with trustees only attending quarterly meetings and leaving the day to day responsibilities to a very part time Project Manager who turns up to give a quarterly report and stays throughout the meeting.'

'Our founder and board member is dictatorial in their approach to running the charity. Therefore, the input of board members is not generally sought and board meetings are currently six monthly.'

In other cases, thinking about governance came about as a result of learning from the programme about what trustees are supposed to do. The Learning Journals indicate that the specific content on governance, as well as the more general content on strategic planning, was helping organisations to understand the role of the board better, and to start making the changes necessary to attract more experienced and engaged trustees. They were more informed about how organisational structure created different levels of responsibility and risk for individual trustees, and how to respond to those risks as individuals and collectively.

## 4.5 Learning and the resilience model

Reflecting the priorities that participants set out in their applications, we can see that a lot of the learning is focused on gaining the tools and techniques, particularly those which might help them to address questions of financial resilience. Additionally, in this round of the programme we have identified a number of organisations directly addressing challenges relating to 'people resilience', including their governance structure and makeup, and the staffing and resources.

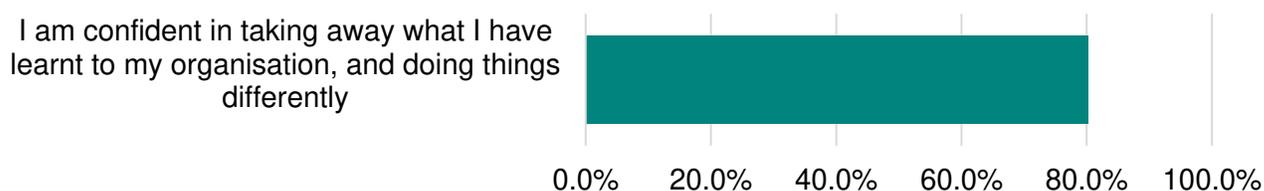


## 5 How do they take the learning back

### 5.1 Confidence to use the learning

Participants expressed increased confidence as a result of the training and felt able to use it within their organisations. In the feedback surveys, participants were asked to what extent they agreed with the statement: 'I am confident in taking away what I have learnt to my organisation and doing things differently'.

Figure 6: Participants' confidence in taking away the learning (net agreement)

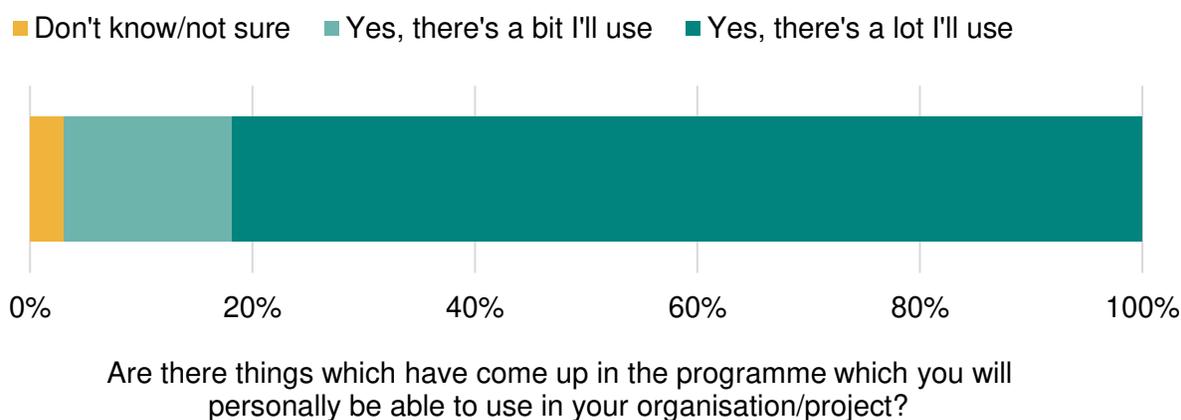


Sources: Training Module Feedback Surveys, 111 respondents.

Overall, respondents gave a net agreement score of +80% with this statement. Looking across the different training modules, fundraising scored a net agreement of +100%, with business planning at +92%. The lowest net agreement score related to the audience development module, at +36%, with around 36% also neither agreeing nor disagreeing with the statement.

We asked participants about whether there was content in the programme which they felt able to use in their organisation or project. We also asked whether they felt confident to implement these new approaches now.

Figure 7: Participants' views on using their learning

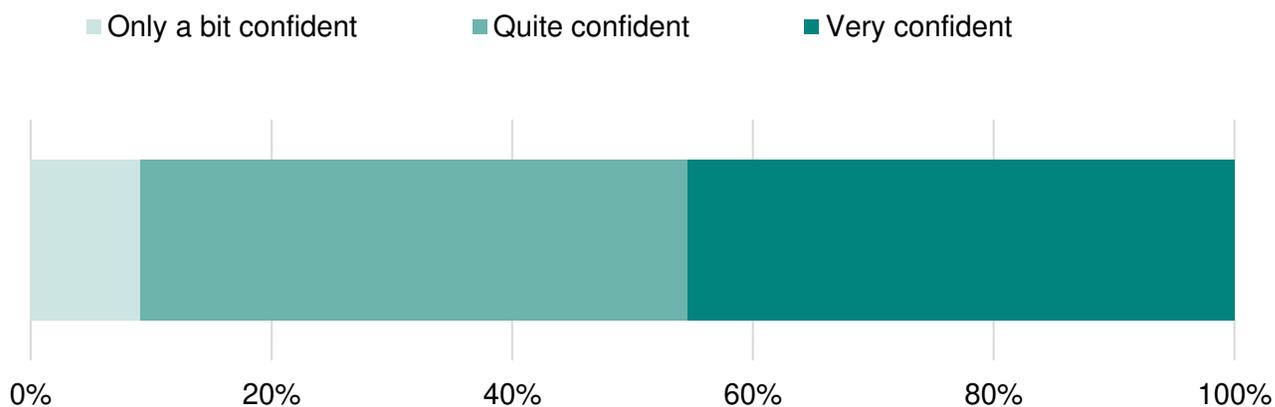


Source: Learning Journal 2, 33 completions.

The responses to these questions indicate that the course content is providing participants with actionable ideas. In total, 97% of participants (vs 82% in previous rounds of the programme) agreed that there were things which had come up in the programme which they would be able to use in their organisation or project (82% a lot, 15% a bit).

When asked 'how confident do you feel personally to take approaches from Heritage Compass back to your organisation *at the moment?*', 45% felt very confident (vs 31% in previous rounds) and 45% felt quite confident (vs 46% in previous rounds) (see figure below).

Figure 8: Participants' confidence in personally applying their learning in their organisations/projects



Overall, how confident do you feel personally to take new ideas or approaches from Heritage Compass back to your organisation at the moment?

Source: Learning Journal 2, 33 completions.

Responses in the Learning Journals indicate that there are several areas in which participating organisations have significantly grown in confidence as a result of the Heritage Compass programme.

We can see that organisations were developing business plans using the tools they have discovered through Heritage Compass. This included reviewing incomes streams to identify potential untapped sources, developing robust cashflow forecasts and revisiting mission statements.

There is also increased confidence to address issues relating to governance and trustee engagement. Organisations were taking the steps they need to upskill trustees, including trustees accessing the Heritage Compass training offer directly. Several organisations had plans in place to recruit new trustees and had made structural changes to enable them to do so. This included, for example, becoming an incorporated organisation in order to provide trustees with reassurance around personal risk.

'I was currently tasked to move the charity to a CIO with the Charity Commission, this would not have happened if I hadn't highlighted the risk to the Trustee group what they would be liable for should the project close as it became unsustainable.'

There is also a strong theme emerging from the Learning Journals in relation to audience development planning. Participants were taking steps to understand their current audiences and their needs, as well as how to grow audiences. This was informing decisions around programmes and business planning. In some cases, the urgency of this work was being driven by applications to the National Heritage Lottery Fund and in this case, the training provided by

Heritage Compass was making organisations feel more confident in gathering the audience data that NLHF required, as well as setting targets for future audience development.

Alongside this, participants were thinking about defining their local community and addressing equity and diversity issues. The programme, particularly the content on audience development, had made them feel more confident in their approach.

‘The Audience Development session was very helpful in shaping our Heritage Lottery bid and enabling us to put into words our aims and objectives around increasing accessibility and the communities we work with.’

## 5.2 Barriers to taking back the learning

### 5.2.1 The slow pace and complexity of organisational change

We asked participants to tell us about the barriers to taking the learning from the Heritage Compass programme back to their organisations. The responses to this question indicate strongly that barriers relate, in the main, to under-resourcing in staffing and in budget. This mirrors our findings from earlier cohorts of participants. At the start of the programme, organisations were dealing with the Covid-19 pandemic and its impact on their audiences, budgets, and staff capacity. There is a sense in the latest set of Learning Journals, that while the sector has moved on from the Covid-19 emergency, the sense of urgent challenge remains, now focused on the impact of the cost of living and cost of energy crises on organisational budgets and audiences’ ability to spend.

In this wider context, we can see that organisations were finding that it takes a long time to deliver fundamental change in a way which is considered, evidence based and brings all the key stakeholders on the journey. Some small organisations found it difficult to work out how to approach the various planning activities that they need to undertake, in the right order, so that they have all the information available with which to make decisions.

‘Having learned what the various tools and techniques are, questions remain on quite how best to apply them and integrate the findings – e.g audience understanding needs to underpin fundraising, as well as delivering our activities as a heritage charity.’

‘I had set aside time to participate in the learning but not time to incorporate and take action on what I have learned. This is something I really need to think about now in my future planning.’

They were aware that their plans may have to change in the light of new understanding or changing context.

‘We anticipate a degree of iteration, as experience influences the validity of initial decisions and insight to how that is managed would be helpful.’

In order to give trustees time to understand proposed changes and ensure buy in, participants were managing the pace of change and introducing new ideas slowly. In some cases, this was a measured and generally positive process.

‘In some cases I will be staggering what we address and how to ensure buy-in by trustees.’

'The lack of workers to undertake tasks and reliance on volunteers makes things slow and stressful.'

In other cases, the process of implementing the learning from the Heritage Compass programme was bound up in challenging relationships between staff and trustees.

'The internal culture of the organisation is struggling overall in the past, continually going back to what has been. Although some trustees are open to moving forward there is reluctance from those with the loudest voice who tried to undermine me at every opportunity.'

### 5.2.2 The connection between funding and capacity

In our previous report, we identified that staff capacity and lack of funding were the most significant barriers preventing participating organisations from implementing learning from Heritage Compass.

This remains the case for the most recent cohort of participants.

'There is only one member of staff and a board which is already stretched in terms of capacity. One staff member is concurrently trying to develop the project strategy, lead on fundraising, plan and deliver programme, support existing and develop new audiences, run all comms/social media and maintain and develop partnerships.'

In the Learning Journals, there is evidence that staff capacity and funding challenges remain acute and are intertwined.

'The more general advice...will be a little more difficult to implement as we remain in need of more people and more time! But we need more income to get those.'

'In order to use what we have learned; we need to successfully implement our Strategic Plan. In order to do this, it is likely that additional staffing hours will be needed, however, this is difficult due to our overheads increasing and our reserves dipping. Therefore, our financial resilience is our potential barrier: we only have a short number of months to successfully make our strategic plan work to avoid our reserves dipping too low.'

For some, this situation has been worsened by unsuccessful funding applications which have derailed plans. One micro-organisation, consisting of a lead artist supported by freelancers, had been unsuccessful with an ACE funding application. The delay in the decision left her committed to running the project anyway on a reduced budget, and she was considering alternative ways to resource her work, having come to the conclusion that grant funding applications are not the best use of her limited time.

## 5.2.4 Governance Challenges

In the earlier cohorts, we saw trustees and other volunteers struggle with capacity, in some cases referencing the impact of increased health challenges and caring responsibilities during the pandemic. In the most recent cohort, there is less reference to these specific issues for trustees. However, several organisations have used their Learning Journals to share challenges with their boards. These challenges relate to a lack of experienced trustees who have the skills and knowledge needed to make the necessary strategic changes to business models.

'Mainly lack of qualified and committed people to help run the organisation.'

Participants describe situations in which longstanding trustees are reluctant to do things differently or are not engaging with the decision making required for large-scale change.

'Although two of us (trustees) participated enthusiastically in the programme, other trustees range from having strong interest to seemingly none. For the latter, the nature of the activity seems to be far beyond any previous experience and is perhaps telling the Board that they are better in roles other than trustees.'

'The only immediate barrier I can see is persuading all the existing trustees to commit formally to helping with the delivery of any agreed business plan and strategy. Some may not be able to do this and will have to be replaced with new trustees. A slightly painful process, but very necessary to progress. Retaining and recruiting trustees will need a targeted strategic approach over the next couple of years.'

One participant pointed out the challenge of managing these complex personal dynamics in small voluntary organisations:

'We now need to tackle the challenge in going from recognition to working sensitively with individuals to reallocate roles (all without an HR department and not undermining the respect for volunteer contributions!).'

For one organisation, the challenge went beyond keeping all the trustees on board with the process of change and extended to a wider membership.

'The vocal and opinionated membership are a bit of a drag on what [the organisation] needs to do to meet the overhead demands. It also feels as though the board accepts we need to move forward but the membership is not behind this.'

## 5.2.6 Relevance

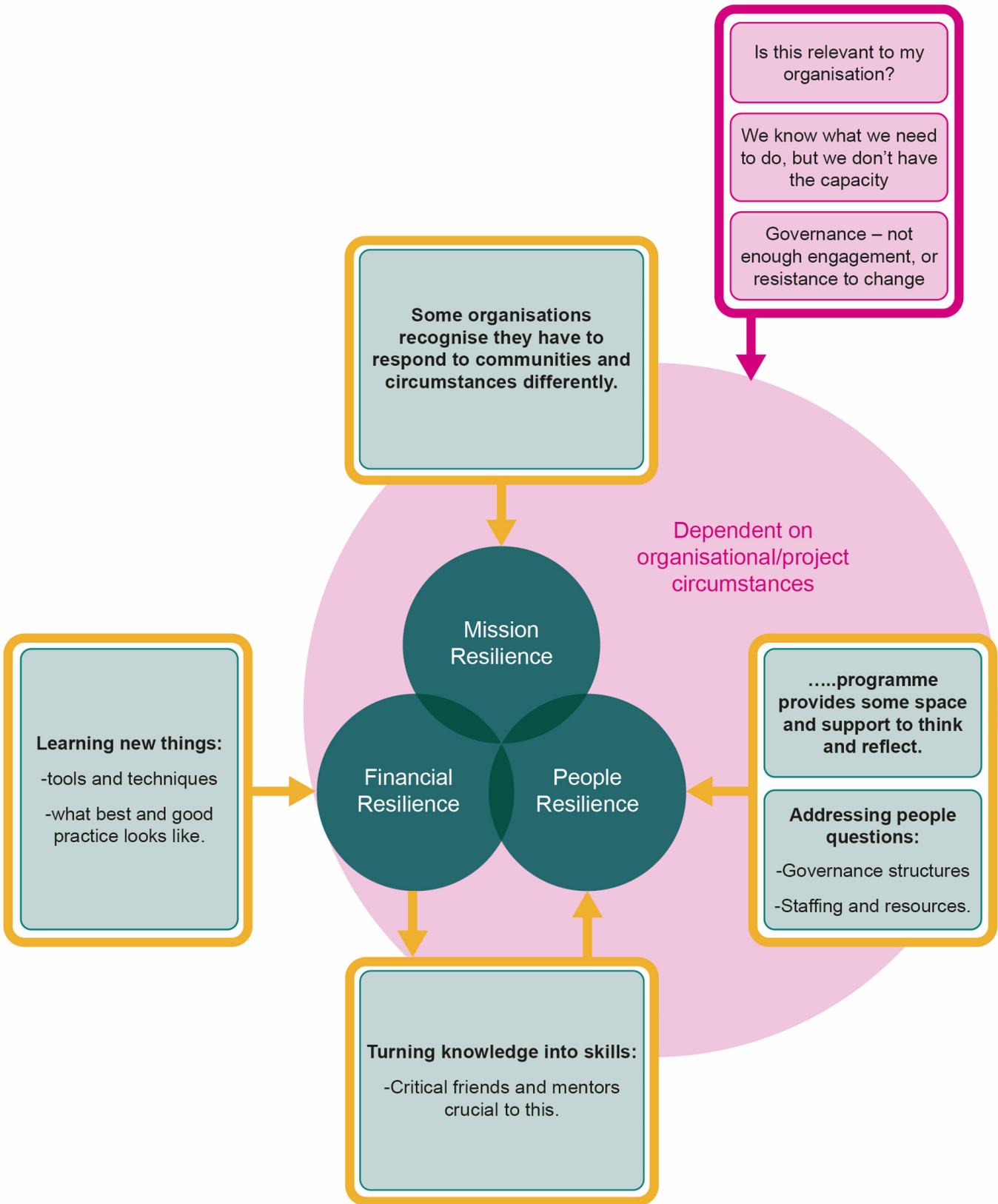
Within this cohort, we see a small number of heritage organisations which have joined the programme because effectively, given their budget and staffing level, they operate as small to medium sized heritage organisations. They are, however, part of the structure of a larger organisation – specifically local authorities and universities. This has raised particular challenges for them in the context of implementing the learning from Heritage Compass. For example, it has been difficult for them to consider their profit and loss, as not all costs are visible to them and some are shared at the organisational level. They have also struggled with finding appropriate comparator data via MyCake and have not been able to use this as a tool to inform their business planning.

At the other end of the scale, some participants in the programme ran projects with aspirations to grow and create organisational structures. For this group, there was a lack of confidence in whether they were ready, or deserving, of a place on the programme and whether they could learn from the other, more established organisations in the cohort. One respondent used the Learning Journal to describe how this lack of confidence was addressed by their critical friend.

'Sometimes it has made me feel overwhelmed and I have been questioning why I have been given the opportunity to be in the programme and whether I was in the right place but...my critical friend has always been a huge support in bringing reassurance.'

## 5.2.7 Barriers and the resilience model

The model set out on the next page shows the relationship between barriers which participants have faced, the three types of resilience and the potential impacts of the Heritage Compass programme.



### 5.3 Additional Support Needs

Participants were asked what additional support would be helpful to them in maximising the benefit of the Heritage Compass programme and enabling them to implement positive change in their organisations.

As seen with earlier cohorts, participants primarily saw critical friends and mentors as the most valuable way that they could be supported to embed the learning from the programme. In the early stages, they expected that much of the immediate support they needed could be provided from within the programme, through mentoring and peer support. Later on, some participants expressed a continued need for support from mentors. In some cases, they had been able to use grant funding from Heritage Compass' own small grants programme, or elsewhere, to be able to fund additional time for mentors to carry out additional work with them. This enabled mentors to see specific projects or strategic plans through to completion, or to assist with specific tasks such as recruitment. Mentors also provided organisations with additional capacity, for example, supporting organisations in writing funding applications or business plans.

'We have made brilliant use of both the critical friend and mentor, managing some extra sessions with Heritage Compass support. The Nisbet grant was for business planning, so we have chosen to invest some of that in using our mentor for further paid strategy and business development sessions.'

Alongside this, respondents recorded in their Learning Journals that relief from their staff capacity issues and lack of funding were what they needed most to be able to unlock the benefits of Heritage Compass beyond the funded period. In this context, they referenced a need for backfill funding so that staff who combined operational and management responsibilities could have time freed up for more strategic work and to help with recruitment.

Throughout the Learning Journals there were references to the value of the peer cohort formed during the training sessions. At least one organisation had arranged to meet another participant who could help with a specific issue. Participants reported that they wanted to stay connected to this newly formed network, which they described as including the trainers and their critical friend and mentor, as well as their peers.

'The value and importance of remaining networked with the individuals and organisations we have encountered along the way. This applies to our critical friend and mentor, course trainers and other participants in the programme.'

'To help address these issues we would be interested in how other, more mature, organisations have implemented new strategies, developed systems and reviewed and revised over a period of time – living case studies. We gained enormously, for example, from contact with another organisation's Chair arranged by our critical friend.'

Participants referenced a number of very specific support needs which had emerged from the work they had undertaken during the Heritage Compass programme:

- Signposting to relevant contacts for advice and support
- Advice on legal structures for the not-for-profit sector
- Advice on appropriate financial controls for their organisation

- Support to develop a social media content strategy
- Coaching.

## 5.4 What has changed for organisations?

### 5.4.1 Internal change

We can see from the Learning Journals that for most of the organisations in the cohort, they were dealing with various levels of change and instability. Much of this feels positive, especially when the change is happening intentionally as a result of action to implement new strategies or fundraising approaches.

A number of organisations described how they were responding to new opportunities, which in some cases had been self-generated and in others were happening as a result of partnership development with stakeholders. The Heritage Compass programme appears to have enabled some organisations to feel more confident and prepared to respond to new opportunities as they emerge.

‘There are new opportunities. The increased level of confidence has opened up a lot more opportunities than we could normally have expected.’

‘A key new opportunity has opened up around working with the Council on programming, aimed at those who live and work in the area. This is an exciting opportunity and may mean a new funding stream too.’

One organisation identified how circumstances can be simultaneously an opportunity and a challenge, discussing how coming to the end of a NLHF funded project which had funded new outreach work was providing a number of opportunities to continue to work with the contacts they had made, while they were facing the challenge of resourcing this work.

Participants also saw internal change emerging from the new skills and knowledge they had formed during the programme. These had built confidence, which in turn was enabling a more open and positive response to emerging opportunities.

‘Before we started this programme, everything felt difficult and a challenge, and we could not see the wood for the trees. Now we tend to look at issues more as an opportunity than a problem.’

Organisations frequently reported change related to the staffing capacity available to them. While some organisations had been able to take on new staff as a result of successful fundraising, or a decision to invest in staffing for income generation, others were working with reduced staff capacity due to funded programmes ending or budget cuts. Similarly, organisations were facing either positive or negative changes which hinged on whether their funding applications were successful or not. We see organisations that are now able to implement major change using grant funding, while others are stuck and unable to implement their plans.

‘We have been successful with our application to the National Lottery Heritage Fund for £186,000 over two years to support our income generation plans. This should give us an opportunity for transformational change and the capacity to put our plans into action.’

Most commonly, organisations which reported success in fundraising, had applied to trusts and foundations, with a smaller number referencing National Lottery Heritage Fund and Arts Council England decisions, which were positive or still awaited. While a small number of organisations were approaching or bidding to local authorities for funds, the only organisations we can see in the Learning Journals which have secured investment from local authorities are Council-run museums and galleries.

#### 5.4.2 External challenges

Much of the change currently being experienced by participants in this cohort of Heritage Compass is being driven by external factors. Organisations are having to respond to rapidly changing circumstances which, in the main, relate to rising costs, particularly the cost of energy and wages. They are also noticing the impact of these inflationary pressures on their audiences, which appear to have more limited budgets available for discretionary spending.

‘Our costs have increased significantly due to rising utility costs and any Covid or energy price related support coming to an end. This has had a significant impact on our finances, pushing us into reserves. It has also been more difficult to sell courses – we think this is in part due to the cost of living crisis.’

Changes in local authorities are a driver for change within heritage organisations, with some venues sitting within the local Council experiencing uncertainty due to funding cuts. This is leading them to think differently about how to demonstrate their value. Organisations which have not yet experienced funding cuts are expecting that they will have to deal with them at some point.

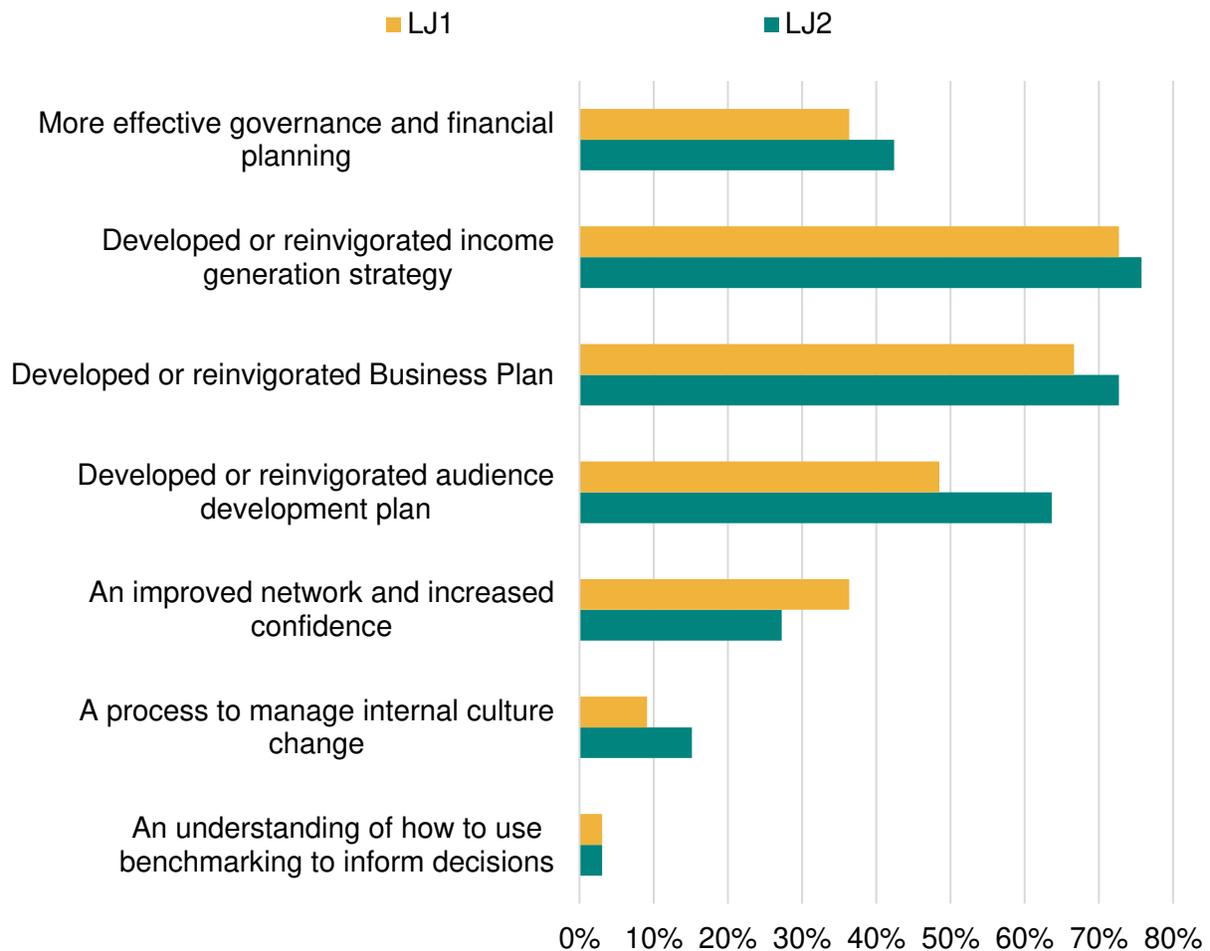
‘The service has not undergone cuts to staffing levels and core exhibition funds in the new financial year. Pressures will continue on local council budgets due to inflation. The challenges around income generation strategies and how to position the gallery within a local and regional context have become a focus in Heritage Compass.’

## 5.5 Priorities and work towards outcomes

Participants were asked to note in their Learning Journals what work was happening in their organisations as a result of Heritage Compass. Strategy and planning tools were mentioned by just less than two thirds of participants. The input and advice provided by critical friends was a crucial area in which organisations felt they had work to take back into their organisations. Fundraising was another general area that several organisations were planning to work on. Some organisations outlined very specific tasks and plans.

We asked participants to use the Learning Journals to tell us which of the outcomes they were working towards. The figure below indicates what proportion of participants completing the Learning Journal selected each outcome as one of their 'three most important' outcomes from the Heritage Compass programme.

Figure 9: Programme participants by most important outcomes, 2



Source: Learning Journal entries, 33.

As with previous rounds of participants, the balance of most important outcomes does not vary significantly between the early stages and the end of the programme. Business plans and

income generation strategies remain the most popular outcomes, though there appears to be a growing interest in audience development.

We asked participants to tell us more about the types of activities they were undertaking in order to meet their aspirations for the programme. Most were working on business planning as they came to the end of the programme, and we can see that organisations are taking what they have learned and shaping it to their own needs. For some, this is the first experience of developing a full business plan and Heritage Compass has been helpful in explaining the basics of what needs to be included and how to produce one.

‘We still don’t have a formal business plan, but we are better equipped with how to produce one, and understanding what it may include.’

In cases where organisations are producing a business plan, we see progress towards this goal, rather than completed plans. In the process of developing their plans, participants are realising that there are other actions that they need to take before they can make the longer-term decisions which will inform their business planning. Often this involves further data gathering, audience research and benchmarking.

‘As a preliminary step, we will be collating evidence of the use to which the Society’s library has been put, the potential for expanding use of the Library beyond current users and developing partnerships in the new community.’

Examples of more substantial actions taken towards the eventual development of a business plan include: an organisation which will be investing in a Director, who will be given responsibility for income generation and fundraising. Another organisation is developing a round one National Lottery Heritage Fund application which will include an element of business planning. As a result, organisations are tending towards the creation of short-term action plans which include the steps they need to take to produce an overall business plan.

‘Our business plan involves hiring a 4 day a week Director to put in place the building blocks for us to become financially viable. They will review all our income streams, including looking at relevant grant applications, and will look at our current business model.’

‘The business plan for the current and new operations has not been progressed at present but is expected to be delivered within the next 6 months as part of a round 1 NLHF bid’.

At least two organisations were engaged in preparatory work for away days, or strategic planning sessions with staff and board, bringing people together to consider the organisation’s future direction.

‘We have just held a board away day which was very productive. The next step will be to start drafting a revised business plan.’

‘I am currently preparing documents for our strategic planning away day which will enable a new business plan to be developed.’

Progress appears to depend on organisational type, and we saw participants whose heritage organisations sat within larger bodies, such as local authorities, struggle with how to create

business plans for their heritage service, which made sense in the context of wider organisational plans.

'It is challenging to ensure that my business plan does not contradict the business plans of teams with which I work – to ensure we're all pulling in the same direction.'

At the other end of the spectrum, individuals who were running heritage projects or small companies effectively alone, found that their business planning decisions were very much about what they personally could manage.

'Also, been thinking about a criteria for decision making/taking on new work – aiming of 3 days a week of work, looking at if the work is sustainable, do I enjoy it, is the pay ok?'

Participants were also working to improve the governance of their organisations, with staff leading on this in some organisations, while in others board members were driving the change. The responses in the Learning Journals highlight the complexity and difficulty of this work. For some, it has involved rethinking vision and mission, whilst others have reviewed whether they need to change their legal status.

'We have had to revise what our community group is about.'

'Converting the company into a CIC is still an ongoing process. I have had a meeting with my accountant about the advantages and protections this would provide.'

'Looking to transition into a charity from a CIC.'

Several organisations were dealing with matters related to the board members themselves, namely their skills and understanding of their roles and how they could best be useful. Sometimes this involved challenging poor performance and reminding trustees of their responsibilities.

'Aiming to better engage all trustees, improve knowledge of good governance and adhere to it as an organisation wherever possible. The governance and emerging chairs sessions were especially helpful with this.'

'Have introduced a list of Governance expectations to the trustees meetings to highlight what the roles of a trustee are and link each meeting report to these expectations.'

Recruitment, succession planning and management of term limits were also identified as priorities and some participants were making good progress in these areas.

'We have no agreed/implemented approach to succession planning and tenure of trustees. Too many of the present trustees have been with us far too long, without having any opportunity to leave or re-evaluate their contribution and commitment. All that must change.'

'Initially we were trying to get people on board, but we didn't really understand what we were asking them to do. This approach has been worked through with the critical friend and mentor.'

'Big improvement, as we have a third Director who is brilliant and a core part of the team. The first board meeting has occurred and now we have a regular meeting schedule in place for the year. We have created an advisory board made up of community participants who report to the board and contribute to decision making.'

In doing this work, many participants found they were effectively in a process of culture change in their organisation. In order to make progress, they needed to have difficult conversations and find a way to either bring people with them or move them on.

'[Organisation name] must change to a more outward facing community with the main aim being to support the community, specifically young people. This is difficult for our older members, who have been supporting the organisation for the past few years. There is a feeling that [organisation name] exists for this group and that is not the case anymore. Complaining and cautious attitudes and trying to cling on to old ways of doing things, undermines the organisation.'

'The main challenge...is the emerging divide between trustees enthusiastically embracing the need for change and more mature approaches, and those who would prefer to just carry on as before, and who are not really coping with the nature of leadership and strategy development work required. It is positive that this has been exposed, as it was a niggling concern that underpinned the selection of this priority for us within the Heritage Compass programme. Learning from other experienced contacts confirms that firm and apparently ruthless steps need to be taken and we should have the courage to change the board significantly in the best interests of the Trust and its long term objectives.'

Organisations have been reviewing their finances through the lens of the models and tools provided in the Heritage Compass training sessions. Commonly, the review process has led participants to identify an increased need to bring in unrestricted income to their organisations. In some cases, this is in response to the loss of a local authority grant. A variety of approaches were being taken to income generation. We can see from the Learning Journals that, as a result of the training sessions, participants were implementing more deliberate processes around income generation, based on price benchmarking, profit and loss calculations and assumption mapping. One participant was using the learning from Heritage Compass to think differently about how to manage income generation; this had been identified as a project in its own right and a project plan was in place for development and implementation of new income generating activity.

Organisations were taking a range of actions to generate unrestricted income, including grant applications, new fundraising appeals, volunteer-led fundraising activity, creation of new merchandise for sale, and marketing of events to new audiences.

There are examples of this activity starting to pay off. One organisation referenced their success in securing further funding from Heritage Compass to develop a detailed earned income strategy. A group of volunteers who took part in fundraising training with Helen Jenkins, went on to substantially increase the profits made at a community open day. Another had introduced new ticketed History Tours and launched a Patreon. One participant had used profit and loss tools shared in the earned income session to review their membership scheme and identified that the income generated does not cover the costs associated with it. As a result, they were reshaping the membership scheme and promoting donations and legacy giving to their

members. Another organisation was in the process of streamlining its membership scheme through online payments and direct debits.

Earned income generation appears to be one area in which the network of trainees has been particularly beneficial. Participants have been inspired by finding out how other organisations raise money, with two highlighting the value of the in-person symposium in this respect.

'Following the initial Symposium, we joined AIM and were successful with a project grant.'

'This year I have commissioned and launched a new webshop to diversify income streams for the gallery and have begun work on contactless donations...It was the Heritage Compass symposium that gave me the confidence to explore this venture. I had been concerned regarding the cost/benefit of a webshop and managing the ongoing logistics of posting original artworks. A symposium speaker suggested that web orders could be made collection only and that is what I implemented.'

Many of the participating organisations were now creating audience development plans. As with business planning, this was a work in progress. We can see from the Learning Journals that some organisations lacked the detailed data required to start work on planning, and therefore put mechanisms in place to collect it.

'The first challenge for us is to establish who our present audience is and why they are interested in what we have been doing.'

'We will be starting with data collection of our own (we have none) and approaching partners and organisations with similar objectives to see if they will share their data with us.'

This work involved a variety of activities, including setting up data counters at venues, improved use of web analytics, audience surveys, and growing contacts databases. Alongside this, some organisations were reaching out to develop partnerships - which will help them to reach target beneficiaries - and carrying out consultation sessions. The focus for audience development efforts appears to be on outreach and community engagement, rather than on growth in audience numbers, and some organisations are applying for funding to support this work.

'[Organisation name] is changing to a more outward facing community organisation with a specific remit to work with young people...We have funding proposals out to work specifically with this audience.'

For organisations which were focusing on audience growth for income generation and sustainability, they were working on marketing and communications strategies, particularly looking to improve their websites and social media strategy.

'Thinking of family audiences with our mentor, we have developed our social media posts to try and broaden the appeal, with considerable success.'

'We will also be looking at more sophisticated ways of understanding the digital audience that visits our website at present and offering more of what we are already doing, like online talks and providing immediate access to the latest emerging research/information.'

Organisations in this intake have been keen to network and learn from each other. While the difficulty of networking online, which we identified with earlier intakes, has remained, there is evidence from the Learning Journals that organisations have made good connections, and some have met outside the training sessions to discuss shared challenges. This may be because the smaller cohort has spent more time in training sessions with the same people.

'I have connected with a couple of the people I met in the online training sessions; we've communicated after the training sessions on LinkedIn and by email – and even with one, we have had a zoom meet to compare and share ideas. This has been so valuable – meeting others in the industry who are open to learning and sharing ideas as we develop our practices (individually and organisationally).'

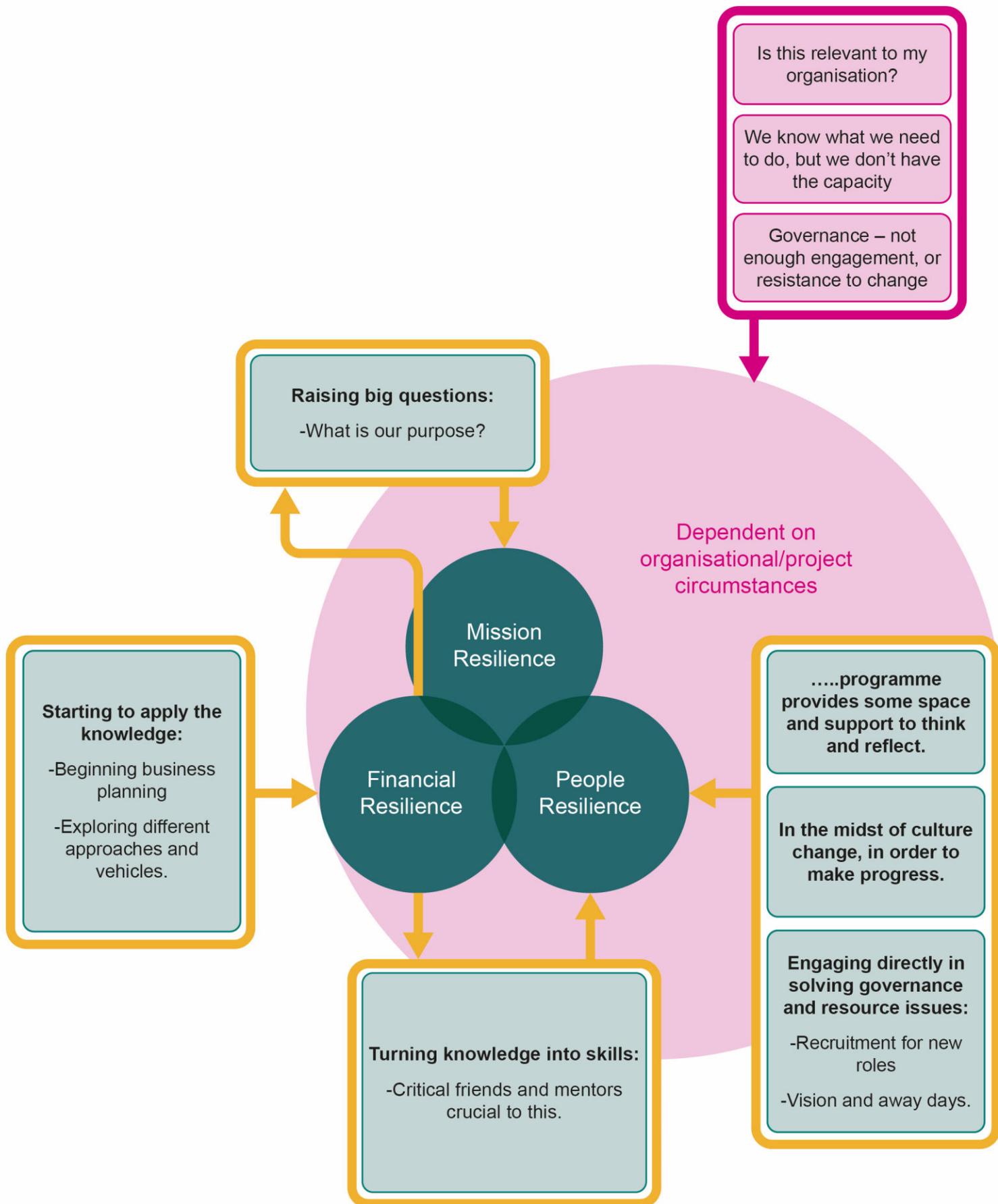
'It has been great to meet a variety of people from a range of organisations, I have much preferred the in person training, as this enables you to really get to talk to people and learn more about their practice. It was also nice to be able to see and work with people a few times over the course of this year. It would be good to have a contact list of all the organisations involved in this course.'

'The group has realised the huge benefit of networking and chatting to other organisations, as this helps us to learn and move forwards. Most groups want to share what they do, so this is a strategy we will continue to use. It has actually been the biggest change in my mind, that talking to people is the best help out there. We are confident attending events and will be giving a presentation on a project we are running, so our confidence has developed hugely.'

The Learning Journals also highlight the value of networking outside the programme, and some participants appear to have been able to make new partnerships and connections with relevant local organisations. This seems to be linked to the sharper sense of vision and aims, which means that they can approach potential collaborators with a clearer 'ask'.

'Good connections made with local Historic England team, Historic Places panel, architects and other professionals have been developed. Planning department in the Council is now also taking place. Attended Heritage Trust Network conference, which has improved confidence and opened up new lines of communication with other organisations.'

On the following page we return to the resilience model and the effect of this work towards outcomes. Most clearly, what we see added to the earlier picture, is a recognition from some organisations that working on new plans for financial resilience, and addressing the challenges of people resilience, has led them to reconsider their mission resilience: i.e. to address questions of why they do what they do, and what the purpose of their organisation is.



## 6 Grassroots networks

As part of this round of the Heritage Compass programme, a new element was introduced. Small networks of organisations were able to bid for up to £2,500 funding to support them to develop their capacity. Six organisations were awarded funding to undertake a range of activities. The networks included existing networks, where organisations had worked together informally or formally already, and new networking opportunities.

Networks bid for funding for activities including:

- Building their fundraising capacity via training sessions and surgeries
- Reviewing and developing their network governance and purposes
- Networking across the sector, providing events, speakers and opportunities to share experiences
- Examining particular topics, such as the family offer in the context of the cost of living crisis.

Two of the grantees to this programme are the subjects of evaluation case studies, which have been undertaken in addition to this report, and reflect upon their experiences. We were able to interview a further three grantees, and to review the final reports written by grantees at the end of their short projects using the grants. The kinds of organisations involved in these networks strongly reflect the types of participants in the main Heritage Compass programme: small and very small heritage organisations and projects, often with limited or no staffing, and a significant volunteering force (including trustees and other kinds of volunteers) at their heart.

Some grantees run networks which are relatively loose, where activity occurs because resources or funding are available. What this means is that those networks may not be formally constituted or meet regularly. It also means that, whilst network participants benefit from hearing about each other's experiences, connecting with peers and sharing the costs/resources of activities, there is no regular pattern of collaboration, or intent to collaborate.

In these instances, the funding supported those opportunities for peers to engage with each other, but there was also a significant focus on using the network as a route to bring in training and expertise which individual organisations would not be able to access on their own. The following reflection from one of the grantees' reports encapsulates this:

'The [training] sessions were not only incredibly informative, but also presented in an entertaining and interactive way. It was also beneficial to do this learning alongside representatives from other museums - to share feedback and experience of fundraising across different organisations.'

On the whole, therefore, the impact of these network grants can be seen more clearly in the way in which organisations take that learning away and apply it within their own activities. From the interviews and network reports, we can see that some organisations which attended training and other similar activities, were given useful ideas and prompts, and there is some evidence of organisations very directly adjusting or developing activities or approaches, building on what they had heard in those sessions. There is also some evidence that these sessions were valuable for individuals and their organisations, in:

- Helping them to carve time out of their busy responsibilities for learning and reflection
- In some cases, enabling small teams of staff and/or volunteers to spend time together, away from the day to day, to think about their plans and activities.

Other grantees had network arrangements which were more substantial – including some formally constituted networks – and/or where there was ambition to grow the network itself, in order to build the potential for more collaborative work. For two of these grantees, the network funding was being used to support activities which aimed to provide both networking opportunities and a chance for network participants to get together and explore areas in which to collaborate, as well as an element of training, or opportunity to learn about interesting projects or practices. From the end of grant reports, there is evidence of network participants gaining value from both of these aims, finding specific training or presentations and sessions interesting, as well as benefiting from the sense of exploring collaborative possibilities. There is also some evidence of unexpected outcomes: greater collaborations and relationships than had originally been anticipated emerged, often because the combination of timing and resources had worked to unlock these possibilities.

One network grant supported a well-established network to review and refresh its own constitution, including addressing questions of membership, values and purpose. Both this grant, and other grants which aimed to support collaborative thinking, found that they were addressing questions of what the purpose of a network and collaborative work was with their members and participants, for example:

‘By working together across [network], we moved from being wholly competitors, to long-term collaborators and communicators - seeking joint solutions which benefitted each of the collaborators and the wider cultural sector. This development will ultimately impact on audiences and has done so already through one specific collaborative pilot.’

‘It’s not just about your organisation. It’s about a collective of people who come to work together. And that is quite interesting, because of where most people are in their heads, means that they can only think about their own organisation. And it’s all about, you know, we must, yeah, all the competitiveness of what you’re doing and what we’re doing, you know, who’s doing what. So, it’s been quite hard in some ways to, I suppose, say to people look, actually, we love our organisations, we’re all important. But if we come together as a group, above our organisation, as a collective, that can be really powerful...I think we’re still in that process of people understanding that aspect of - ‘what is a network?’

Overall, when reflecting on the grant application and drawdown process, grantees were grateful for a relatively light-touch process, which felt appropriate to them. When we interviewed grantees, we asked them about other sources of funding for this kind of networking. On the whole, grantees were unable to identify any other regular sources of funding to support developing the capacity of small organisations through networks or developing collaborative working.

The resources required to run networks, particularly those where the network itself sought to generate collaborative opportunities, were a challenge for some grantees. In some cases, networks were resourced via some central facilitation and support, but only very minimally. In other cases, individual organisations were leading and often carrying the burden of administration and support for networks. Both of these situations suggests that these kinds of

grassroots networks are fragile. Given their value to those organisations which participate, which is evident through the impact of the network funding given as part of the Heritage Compass programme, this opens up an interesting question about what kinds of resources and funding are available for small and very small heritage organisations, and what kinds of networking activities it might be valuable to support, in order to ultimately support the greater resilience of organisations in the sector. For grantees where a lead organisation from the network had previously taken part in the full Heritage Compass programme, there was a clear connection and follow-through of learning and development from participation in the full programme, through to sharing that learning with their networks.

## 7 Strategic Support Resilience Grants and Guided Strategic Training Programme

In this round of the Heritage Compass programme, the programme also included two new elements, to support organisations at an individual level to develop their planning and thinking to support their resilience. Organisations were invited to apply for up to £5,000 (up to a maximum of 20% of their turnover). 34 applicants were successful (from 151 applications overall), suggesting that this type of funding is both needed, but also not widely available elsewhere to small and medium-sized heritage organisations. A total of £149,068 worth of grants were made across these successful applicants.

Looking at the successful applications, applicants applied for a range of activities and resources, including:

- Consultancy support to develop funding bids and fundraising strategies, including developing and launching new fundraising initiatives and systems
- Backfilling for key staff members, to enable them to engage in strategic planning, or supporting key projects
- Extending fixed-term contracts of key staff members, to extend the benefits and impact of particular interventions
- Funding for bringing in specific, targeted expertise (e.g. marketing)
- Design, updating or installing new hardware, software and other physical fit-out
- Support for the development of business plans and cases, and other associated plans, including audience development plans and evaluation strategies
- Support for governance and change management in organisations.

Across all the successful applicants, fundraising was the area most commonly identified where applicants were seeking specific support. This was often, however, tied to a bigger picture about organisational and business development.

Another new element of the Heritage Compass programme was a Guided Strategic Training offer. Launched in 2023, this guided training programme provided participants with the opportunity to receive additional bespoke support. Delivery took place from October 2023 through to January 2024, with 19 organisations supported in total.

The initial call-out welcomed applications from Heritage Compass participants to select a strand that they were most interested in developing. This was separated into four cohorts:

- Cohort A – Fundraising Strategy: support with the development of a fundraising strategy, including organisational analysis; benchmarking; recommendations for messaging and resourcing plus a light-touch fundraising plan.

- Cohort B – Earned Income Strategy: support with the development of an earned income strategy, including background information, need, future plans, outcomes, monitoring and evaluation and a clear budget.
- Cohort C – Business Planning: support with the development of a business plan, including background and context review; SWOT analysis and benchmarking, plus a review of existing KPIs and support with setting new ones across your team.
- Cohort D – Audience Development: support with the development of an audience development plan including context analysis, audience segmentation, and the development of KPIs.

As part of the application process, participants were asked to provide a 450-word summary of: what support the organisation needed and why; how the support would benefit the organisation and its communities; and how the organisation would maximise the opportunity.

26 applications were received in total, with 19 organisations being selected as part of the programme. Participants were then separated into their chosen cohort, and participated in the programme, which included:

- Three 2-hour training sessions with the cohort lead, which supported each participant to learn key skills in establishing and developing a specific strategic plan.
- Between each session, organisations were then asked to complete an element of the template provided and received robust feedback from their cohort lead.
- At the end of the programme, participants created a presentation summary of their strategic plans, and presented this to their cohort lead and a panel of experts, who provided feedback and guidance on next steps and implementation.

Participants applying for this support were able to articulate work which they had already undertaken through the Heritage Compass programme, and how their planned area of specific focus, fitted into the wider picture of their organisational development.

## 8 What has been achieved?

The interim and final evaluation reports for the earlier rounds of the Heritage Compass programme conclude with reflections on the Theory of Change and Outcomes Framework, developed as part of the evaluation. The conclusions to this report offer some briefer reflections on this round of the programme and its contributions to the outcome framework. They go on then to explore some wider learning, including:

- Perspectives on resilience and what this means for small and medium heritage organisations
- An overview of what else the sector needs, reflecting discussions at the Symposium Day and the Reflection Day, and material from the Learning Journals.

### 8.1 Outcomes

When we worked with the delivery partners on the Theory of Change and Outcomes Framework, we discussed the challenge of understanding the likelihood of longer-term outcomes which may not take place within the lifetime of the programme itself. The evaluation collected data within the lifetime of the programme and has no current access to post-programme data or feedback from participants. Thus, what we have looked for across the existing evidence are plans and ambitions from participants to work towards these longer-term outcomes.

1. Participants are involving a wider number of people in heritage.
  - Clear in the application data, and across the planning of many of the participating organisations, is a desire to attract a greater number and a greater diversity of visitors, audiences and participants. From the application data in this round of programme participants, we can also see that, at the beginning of the programme, some organisations were already thinking carefully about how they remain important to their communities, and how they develop overall.
  - From the feedback on training courses, we can see that participants are building their skills and knowledge in this area. In the applications for Strategy Support on Audience Development Planning, we can see organisations which already have specific ideas about the target groups they want to reach.
  - Across the grassroots network grantees, at least three organisations identified potential future collaborative working to grow their audiences, visitors and participants; a key example, also explored in a case study, is North East Family Arts Network, which used both their participation in the main programme and their grassroots network grant as a way to make their work more strategic, and to target their work to address key groups and issues, including child poverty and disability.
  - Taken together, we can see a commitment to, and significant planning for, heritage organisations getting a **wider number of people involved in heritage**.
2. Participants continue to be better networked.
  - In this round of the programme, there is some evidence from the Learning Journals that participants have made some stronger connections through participating alongside each other in the modules and other activities than we saw amongst previous cohorts.
  - The addition of grassroots network funding in this has substantially supported a range of organisations to develop their networking, supporting learning in a peer environment, enabling organisations to make connections, and in some cases,

building the capacity of the networks themselves to support more collaborative working. In this area, we can particularly see the potential for **more resilient organisations** whose ambitions are supported by this kind of collaborative working.

3. There is evidence that skills are shared widely within organisations which participated in the programme.
  - As with previous cohorts, we can see that some participants have been able to include multiple staff members, volunteers or trustees in their training, critical friend and mentoring opportunities. Again, we can see specific plans in Learning Journals to share that learning more widely across their organisations.
  - Some participants were already putting their skills into action within the lifetime of the programme. The case studies have given us an opportunity to return to some participants from earlier cohorts, and with this group, we can see that participants have applied their learning, developing new business plans, fundraising approaches and bids, and sharing that learning with their colleagues is clear evidence of **skills development within the sector**; a key example from the case studies, is the way in which Black Heritage Walks Network has developed material through the Heritage Compass programme which colleagues across the organisation are now able to use to present the organisation to stakeholders.
  - The addition of the community grants, strategy support and the grassroots networks, also provides different ways in which organisations are able to spread the learning and skills across staff and volunteers.
4. Participants have diversified income streams, strengthened business models and are boosting the local economy.
  - Particularly important for applicants in this round of the programme was the development of business plans, income generation strategies and audience development plans. This is very similar to previous rounds of the programme, and we can see that these priorities remained the same over the course of the programme, and are strongly reflected in the grassroots network grants, the community grants and the strategy support programme.
  - From the case studies, and particularly the updates with participants who engaged in the first round of the Heritage Compass programme, we can see evidence of successful funding applications for both project and revenue funding, and of participants building a range of income streams in key areas. Key examples include Marlborough Productions becoming an Arts Council England National Portfolio Organisation and gaining significant NLHF funding; the Historical Diving Society gaining a NLHF development grant; Red Archive gaining their first ever grant; and Black Heritage Walks Network positioning themselves within the tourism offer to commercial conference organisers. These successes reflect organisations which came to Heritage Compass with significant ambition, and which have been able to use the programme as a way to support that ambition. These plans begin to contribute to the potential longer-term outcomes for **more resilient organisations** and for **boosts to the local economy**.
5. The Heritage Dashboard is being used by participants.
  - Across the programme, the Heritage Dashboard has typically been less well-understood than other elements of the programme. From feedback across all cohorts, however, when participants are introduced to it properly, it becomes a

really meaningful tool for benchmarking, and financial planning, contributing to the potential longer-term outcomes for **more resilient organisations**.

## 8.2 Wider learning from the programme

From the Learning Journals, we can see that there has been a great deal of specific learning from the training modules, which was described at length in our earlier report on cohorts one and two and has remained consistent for the new intake. We can see this learning happening at different levels. There is an immediate change in participants' awareness of different tools and models for thinking about strategy and planning, which have been demonstrated and which many have started to apply with additional support from critical friends and mentors.

At a deeper level, the training courses taken as a whole, have provided participants with a model for what a well governed and managed heritage organisation looks like, and they have been able to compare this model with their own practice and see what needs to be done to improve. In our previous evaluation, we identified the crucial role played by critical friends and mentors in the Heritage Compass programme, and this remains the case with this round of participants. Critical friends and mentors have helped to create that crucial space to reflect on the learning and to think about how it really applies in individual organisational environments. **As a result of this, we can see some organisations starting to understand better what kind of changes they need to make** and making good progress in implementing them.

A crucial aspect of the learning from applying the resilience model to the Heritage Compass process, has been to **recognise the interrelationship between different types of resilience at different stages of the process**. Ultimately, many organisations have needed to address questions of 'mission' resilience – the purpose of the organisation, and its relationship with the communities it wants to reach and serve – as well as identifying the right tools to address questions of financial resilience. For organisations which described the programme as transformative – for example, North East Family Arts Network – the programme has provided the space and support to shift their mindset, to engage with their goals strategically and to build a pathway towards them.

**People resilience has remained in many ways the most significant challenge for organisations participating in Heritage Compass.** Across the main programme participants, those seeking community grants and strategy support, the grassroots networks and what we have learnt from those who contributed an update to case studies – the fragility of organisations which are staffed only minimally, means that individuals (both paid and unpaid) carry the significant burden, not only of keeping the lights on, but also of trying to prepare for the future. Where individuals have really benefited from Heritage Compass, we can see that their confidence has grown, they have new skills and knowledge and they are leading change in a wide variety of settings and circumstances. There is, however, a real cost to this significant work.

At the Reflection Day, where members of the delivery team, including critical friends and mentors, staff from NLHF and participants from the programme met in a small group to reflect upon some key aspects of the programme, one of the themes which emerged was **the question of the wellbeing of workers and volunteers in the heritage sector**. Many of the participants in the programme are deeply passionate about the heritage that they preserve and promote, and it is this passion which keeps them doing that work. The resilience model demonstrates, however, that even with significant support and training, individuals can find it

difficult to take their ambitions forward. **There is a significant tension between the ambitions and potential of some organisations, and their capacity to drive change and new opportunities forward.** As NLHF does in its support for volunteers, it is important to acknowledge that significant unpaid labour underpins this part of the sector; in future business development support, and more widely, thinking about the wellbeing of those people who are caring for and sharing heritage, will be valuable in ensuring that organisations can develop without risking the resilience of their key resource: their people.

Many of the challenges set out in this report were strongly reflected in the breakout sessions run as part of the Symposium in January 2024, in which organisations were asked to think about what challenges they were facing, and what support they needed next. Amongst the topics raised, there was significant enthusiasm for further networking and collaboration. This last group of participants have on the whole, been more likely to report successful networking through the programme, suggesting that the smaller cohort size may have been beneficial. This is a useful finding for future programmes of this kind. The success of the grassroots networks grants is significant, as is the relative absence of other sources of similar funding. On the whole, the networks which received grants were themselves small, and therefore limited in their capacity to run networks and networking activities. **A key question for the future resilience of the sector is where the resources exist to support the development of networks and collaboration, particularly for small and very small heritage organisations.**

Over the course of the Heritage Compass programme, some organisations engaged in online training and networking for the first time. On the whole, wider digital development of heritage assets and activities, and of engagement with audiences, has not been a significant part of the Heritage Compass programme. At the Symposium, however, we heard that, increasingly, organisations are aware that they need to be engaged in the opportunities which digital capacities, including AI, might offer.

Identified in our final report for the previous round of this programme, and in the views of participants in the breakout sessions at the Symposium, is the **ongoing challenge of organisations finding the time and space to think strategically.** The absence of funding for core delivery, means that many organisations of the size of Heritage Compass participants, effectively move from one project to another in funding terms, with very little space to plan longer-term. The overwhelming interest in the community grants suggests a huge appetite for this kind of funding, designed to support this thinking and enabling organisations either to invest in external resources, or to support staff to take the necessary time out of operational duties to think strategically.

Ultimately, **the Heritage Compass programme has had a significant impact on a wide range of organisations.** The updated case studies enable us to see that this impact continues significantly after the programme is finished. Key areas of impact which are evident in the case studies include:

- Successful fundraising and income generation, for example with Marlborough Productions, the Historical Diving Society, Red Archives and the Black Heritage Walks Network, where Heritage Compass has helped to organisations to develop their fundraising case for support and provided advice and guidance at key points.
- Making a significant step up or forward in thinking, planning and – in some cases – doing. Several organisations describe a kind of maturing or transitional process, with Heritage Compass as a key resource to underpin this change. Examples from the case studies include:

- Marlborough Productions has developed its profile and confidence as a heritage organisation.
- Black Heritage Walks Network has significantly expanded its profile and offer, including their positioning as a tourism organisation.
- Historical Diving Society has upgraded its governance and finance processes to be funder-ready.
- North East Family Arts Network has moved its work into a strategic space, influencing programming as well as marketing.
- Causley Trust has developed its internships programme and raised its profile and visibility at a time of significant challenge.
- Red Archive gained its first grant and identified new income streams.
- Stradling has underpinned its transition to become more self-sustaining by reviewing its governance, producing an audience development plan and options for building management and use.

Innovations in this last round of the programme have addressed and tested the effect of intervening in key areas and provided support for organisations to plan in detail for their own resilience. The programme has also recognised people resilience – time and resources – as a crucial challenge for these organisations. This has been reflected in the support offered through strategic support resilience grants and guided strategic training programme. Additionally, the network funding has provided space and expertise for networks to support skills development, and to engage in exploring collaborative ways of working, in which smaller organisations can extend their ambitions beyond their own resources. Heritage Compass has been a vital resource, in enabling organisations to develop their skills and knowledge and to plan with confidence to achieve their ambitions.

Overall, the key learning from Heritage Compass for future business support programmes seeking similar outcomes includes:

- The importance of bursaries or other mechanisms to allow staff and volunteers in very small organisations to participate in the programme.
- Organisations begin from different starting points, and this affects not only the progress they make, but also their ability to engage significantly in a business support programme.
- The critical friends and mentors have been crucial in helping participants turn knowledge (from training and other resources) into skills, and applying those skills in the specific context of their organisation and the challenges and opportunities they face. The Strategic Support Resilience Grants and guided Strategic Training have built on these relationships, enabling organisations to access the resources and develop deeper understanding and capacity in the areas they really needed it.
- The length and intensity of the programme has helped organisations make space to think strategically, to move beyond the day-to-day and consider their mission and purpose, and what is required to achieve their ambitions. This has been fundamental in underpinning successful grant applications and income generation, and in supporting wider business planning.
- Small organisations gain significant benefit from building networks, and from some of the things that networks allow them to do – e.g. share training and development opportunities – that they cannot do alone. This programme provided crucial funding, which is not otherwise widely available for networks.



This report was written by Tamsin Cox and Kate Rodenhurst