

HLF Consultation – BEFS response

Submitted via online questionnaire, summarised here.

BEFS ‘Tended to Agree’ that HLF’s role in future should be to inspire, lead and resource the UK’s heritage to create positive and lasting change for people and communities because: as a funder, HLF is well positioned to inspire and lead - making sure heritage can create positive and lasting change for communities. However, HLF should ensure it works WITH those organisations already doing so - adding value, rather than creating additional lead-body style structures.

In relation to the different aspects of HLF’s role, other than grant-giving, BEFS selected the following as the most important aspects for future focus.

- Building strategic partnerships and collaborations
- Supporting the capacity and resilience of the heritage sector as a whole
- Sharing learning
- Advocating for the value of heritage
- Supporting organisations within and beyond the heritage world to come together, collaborate and network

This is because HLF should remain focused on the Heritage aspect of its work. Enabling partnerships and collaborations to get best-value for its investment, is essential. HLF have many years of data, and much experience across a wide range of project types - sharing their learning with the sector, in the form of workshops and open-data would be of great benefit to the sector.

When considering the most important heritage needs or opportunities that investment from the National Lottery should address in the UK, BEFS considered that HLF should examine its own data. It’s many years of experience within this arena could well provide the answers.

BEFS responded to ‘the most important heritage needs or opportunities that investment from the National Lottery should address in your region or country’ as relating to HLF being mindful of: The split between Rural and Urban investment and funding. Rural projects and locations may individually have smaller audiences and less 'benefit' in terms of pure numbers, but their impact upon a community can be far greater.

HLF ‘should’ give priority to heritage considered to be ‘at risk’ -

However, BEFS supports this being ONE of a number of criteria, rather than a specific priority – giving priority to at risk heritage could encourage neglect, which is to be avoided. Any ‘heritage’ needs to be seen within a wider context. Perhaps, if something is unique *and* at risk then it may deserve higher priority. If an At Risk heritage site had no possibility of long term feasibility then this was not seen to be a good use of HLF funds.

BEFS responded that HLF should take account of different priorities for heritage in England, Northern Ireland, Scotland, and Wales within a UK-wide framework, but only to an extent - BEFS would be keen to note that priorities may well be related to communities, rather than geographical boundaries. This response was related to concern that HLF has tried to address different priorities previously, without significant success. Perhaps HLF could consider working more closely with organisations already active within under-represented areas to lift perceived barriers to application.

BEFS ‘Tended to Agree’ that HLF should address under-representation in their funding of geographical areas that experience deprivation. However, best value for investment still needs to be considered, if an area is not ready for investment then suggesting heritage-led development at a later

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stage may be more appropriate. Perhaps HLF could consider working more closely with organisations already active within under-represented areas to lift perceived barriers to application, and enable greater readiness for appropriate projects.

HLF could most effectively support organisations to collect better data on who is benefiting from heritage projects by providing clear and simple evaluation techniques - shared automatically with fund recipients. HLF could:

- tell organisations what data is poorly collected currently, so they know where to focus their energies
- incentivise data collection as part of fund recipients responsibilities
- ask about data gathering as part of application process

BEFS believes that frameworks from HLF, and HLF sharing data, will make it easier for fund recipients to 'fill the gaps' and report accurately on the information most useful.

Below is the list of outcomes HLF propose to cover in our new Strategic Funding Framework – these will be used to prioritise funding and measure impact.

- 1. Heritage will be in better condition**
- 2. Heritage will be identified and better explained**
- 3. People will have developed skills**
- 4. People will have learnt about heritage**
- 5. People will have greater well-being**
- 6. A wider range of people will be involved in heritage**
- 7. The funded organisation will be more resilient**
- 8. The local area will be a better place to live, work or visit**
- 9. The local economy will be boosted**

BEFS 'tended to disagree' that HLF should focus on these nine outcomes as:

- a single project should NOT be required to meet all criteria
- BEFS has concerns that **5** in particular (and also 7, 9) are extremely hard to evaluate, particularly for: a small organisation; where a project is short-term (1yr or less); and where baseline information may not be available. BEFS would recommend that Wellbeing and Place Betterment could be Aims rather than Outcomes.

BEFS comments on how people might gain greater well-being through heritage projects was related to: a lack of a baseline for involved individuals personal wellbeing - any further information gathered can appear positive, but in reality be relatively meaningless.

BEFS 'tended to disagree' that HLF should focus on putting heritage at the heart of place-making across the UK. BEFS saw this aim as too broad for HLF – there are other funders, including other Lottery charitable arms which deal with wider community aspects. HLF should focus on Heritage, particularly if it wishes to extend its leadership role within the sector. Place-making is an essential part of heritage work, but placing *heritage* at the centre of HLF funding should be the primary focus.

HLF should fund more commercially focused approaches to support projects with a focus on enterprise and skills. With caveats: There are many positive aspects to this, but it is not appropriate for all applicants/applications. There is benefit in HLF being open to, for example, partnering with Local Housing Associations and enabling heritage assets to become housing stock. However, there are concerns that the grant timeframes can make it difficult to form partnerships enabling this level of enterprise change.

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In relation to how HLF can best work with other organisations to support the viable reuse of existing underutilised buildings, BEFS suggested knowing the heritage and inter-related players in any geographic area can help HLF to suggest appropriate partnerships for long-term enterprise and investment strategies.

Recent research by Nesta in partnership with Heritage Lottery Fund and Arts Council England demonstrated significant financial and non-financial benefits arising from a matched crowd-funding approach, whereby an institution such as HLF offered to match fund money raised by the ‘crowd’ for small and medium-sized projects (£4000-£40,000).

BEFS was ambivalent on whether HLF should provide match funding for organisations who use crowd-funding to win support for their heritage projects. Because: there is potential for this but BEFS would NOT like to see crowdfunding become an essential element of application assessment. Crowdfunding is an excellent way to build a supporter base, and to raise awareness. However it is extremely difficult to put appropriate staff/volunteer time into a campaign effectively. Funds can also be more limited in rural/remote areas with lower population. Small organisations may not have the digital know-how to launch and manage a campaign effectively. Poor cost-benefit analysis for 'fundraising' regardless of other awareness raising benefits.

BEFS thinks HLF could help organisations ensure that their digital content is accessible to the public now and safeguarded for the future by: providing a hub for legacy materials and digitally published information from HLF projects. HLF could provide a useful library of both case-study information, and demonstrate the wide additional value HLF has supported over many years. Projects funding a website for several years after the project has ended, but with no administrative support or ability to update/debug/fix as necessary doesn't help the sector in the longer term.

BEFS was keen that HLF support innovation in the use of digital technology by organisations that look after heritage and engage the public with it, but only sustainable individual digital projects; those with no longevity may not be the best use of resources.

In relation to whether HLF should support the heritage sector to engage internationally and deliver benefits for the UK, BEFS thought this was difficult to assess what would be best in the current Brexit climate, without full details of the details/impact that Brexit may have on the Heritage sector and related tourism.

HLF research highlighted the importance of decisions being made with the input from people with a range of backgrounds and experiences. BEFS thought HLF *should* involve the public in decision-making but had concerns around Capacity and Cost, both to applicants and to HLF. Could involvement be set within a participatory-budgeting model? Would this be a better form of true involvement? BEFS appetite for public involvement for much larger (Millions) projects was greater. With a larger grant the applicant would have more time to be able to ‘lobby’ the public effectively. BEFS viewed public involvement as too time consuming for smaller grants. BEFS also had general concern that the public that get involved will still be self-selecting.

BEFS considered that the level of grant HLF should consider this for was - over £2m

BEFS comment on HLF’s proposal for an *open grant programme* for all types of heritage project, was that: evidence based assessment and awards will need to be closely monitored to make sure certain kinds of heritage, or locations do not lose out from this alteration.

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BEFS agreed with the proposal that HLF increase the ceiling for single-round grants from £100,000 to £250,000 as this enables wider range of projects

HLF currently have no upper limit on the value of their grants. In the current Strategic Framework since 2013 HLF have made 20 awards over £5m and up to £19.7m, and given the green light to 11 further projects to develop their proposals. With a lower annual budget, BEFS did NOT think that HLF should set an upper limit on awards. An unpredictable future means you never know what essential projects may present themselves for funding, and a hard limit may prevent future projects, rather than enable.

BEFS view was that HLF should prioritize investment in smaller grants (under £250,000)

As: HLF's own data should enable the organisation to know if this would provide greater benefits/outcomes and opportunities. BEFS heard an example given of an organisation able to redistribute HLF funds locally for very small amounts. This may mitigate the administrative costs to HLF and add greater local knowledge and benefit. Perhaps this model could be extended. If you take away some larger projects would there be more, smaller, applicants? BEFS considered this an hypothesis worth testing.

BEFS was happy for HLF to maintain their current approach in relation to the % support applying organisations need to provide in match-funding BEFS saw this as currently a manageable amount which insures 'buy-in' from organisations receiving funding in relationship to risk and partnership aspects.

BEFS 'tended to agree' that all projects should embed environmental sustainability and that this should be part of HLF standard criteria for the assessment of applications. With the view that this was evaluated: where economically possible, and when well cost-assessed.

BEFS strongly agreed that HLF should introduce an Expression of Interest screening stage for larger grants as this process enables organisational capacity to be best used.