

CITY HERITAGE TRUSTS - REVIEW REPORT & RECOMMENDATIONS



HISTORIC
ENVIRONMENT
SCOTLAND

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Background

Circa £3 million or 20% of the Historic Environment Scotland (HES) annual grants budget is currently allocated to support City Heritage Trusts (CHTs) on an annual basis – a figure that has remained constant since the CHTs were established in 2004.

CHTs operate in seven of Scotland's eight cities and were set up in response to recommendations made by the Scottish Government's Review of Scotland's Cities (2002). The CHTs are independent organisations primarily funded by HES but often receive additional funding from their local authorities and, in some cases, private trusts, foundations, and individuals. Funding from others is frequently project-based, whereas HES funding can be used for both project and core funding requirements.

When initially established, the primary role of the first set of CHTs was to act as a local grant-giving body, dispersing primarily capital funding on behalf of HES in Scotland's cities. They worked as a three-way partnership between HES, the local authority, and the CHTs. The principle behind this was that local experts working collaboratively with others in the locality would be best placed to understand local needs and be more able to direct resources.

The structure would also provide a human resource on hand to stimulate and coordinate projects that may involve properties in multiple ownership, where individual owners within one building may have differing appetites for conservation/repair projects. Over time, the role of CHTs has evolved into supporting training, awareness raising, events and activities to engage a diverse audience. This evolution results from both the CHTs changing priorities and direction from HES.

Initially, four CHTs were established in 2004 in Aberdeen, Dundee, Inverness, and Stirling, with funding also made available for the same purposes to Edinburgh World Heritage. A further Trust was created in 2007 in Glasgow, and in 2012, a City Heritage Fund for Perth was established to be delivered by Perth and Kinross Heritage Trust, who were already in operation. Perth and Kinross Heritage Trust and Edinburgh World Heritage Trust were already operating when the CHTs funding was established, so they have a wider remit than others.

There are minor differences within wording between the CHTs, but the common strategic objectives can be defined as:

- To safeguard and enhance the quality and condition of the city's conservation areas, historic environment, and sense of place
- To promote wider understanding, enjoyment, and appreciation of the city's historic environment
- To work with others to amplify the impact of wider initiatives to improve the city and make it a better place to live, visit and invest

- To be open, transparent, effective, and efficient

Previous Reviews

Prior to the current review, Jura consultants have undertaken two CHT reviews over the last ten years. The first of these was part of the 'Impact of Historic Environment Grant Investment' report, which was a general review of all HES grants programmes in 2013. The second, 'City Heritage Trust Review' was finalised and shared with the Trusts in 2016.

Purpose of the Review

The review's purpose was to examine the City Heritage Trust programme's achievements and explore whether they remain fit for purpose in their current form.

Methodology

The Review has taken the following methodology:

- **Internal review of key documentation:** historic records held by HES have been reviewed to build a picture of the historic engagement with CHTs.
- **Engagement with CHTs:** workshops, questionnaires, and meetings have been held with CHTs at officer and Board level.
- **Informal stakeholder engagement:** conversations with key external stakeholders have taken place to sense-check findings within the broader context.
- **City site visits:** each Scottish city with a CHT was visited and between 5-10 capital projects were viewed by the Review Team in each place. Where possible, meetings were held with grantees onsite.
- **Internal HES engagement:** senior colleagues in HES reviewed draft findings and reports and were given the opportunity to comment. The review has a HES Board sponsor and will be presented at a meeting.
- **External consultant support:** EKOS consultants were appointed to review the work done by the Review team and develop a new monitoring and evaluation framework.

CHT Achievements

The CHTs engage in a wide variety of activities spanning online community engagement, from education and training to direct building funding. There are examples of activity across the full 13 HES grant outcomes from multiple CHTs, and certain projects can also span multiple outcomes. High-level achievements of the CHTs are as follows:

- Over the last 3-4 years, CHTs awarded £5.6m in conservation and repair grants through their main programmes to nearly 500 projects.
- From 2018-2021, the total value of works completed was over £22m, giving an average leverage rate of £2.98 of private/other funds committed per £1 of CHT grant.
- Over 6,000 people have physically attended CHT-led skills workshops, training, and community events, with thousands more connected online to community interest cascades

Key Report Findings

Some of the key findings include:

- When working well, CHTs can provide an invaluable source of local heritage expertise, a linchpin for engagement and a keen promoter of community identity through the historic environment.
- However, a consistent data baseline is lacking on the operation of the CHTs, making it hard to assess the impact across the programme.
- Reporting and evaluation from the perspective of HES and the CHTs could be more streamlined and effective.
- CHTs were designed as a 3-way partnership between the CHT, HES and the Local Authority, which partnership has not been maintained in all cases.
- HES support and guidance has not always been consistent over time, as internal priorities have shifted alongside reorganisation.
- Not all findings from previous reviews have been implemented.
- Some elements of the CHT-funded projects and activities have not been universally successful in achieving value for money.

Recommendations

The following are the recommendations of the Review Team:

- Develop an application and monitoring framework that allows for the establishment of baseline data for all CHTs
- Support stronger relationships between the CHTs and HES staff to assist in the delivery of priority outcomes for the historic environment
- Support stronger relationships between the CHTs and their local authorities
- Increase the funded period for CHTs from 3-5 years, such that they are enabled to undertake more challenging projects
- Give CHTs more opportunity to develop their own delivery programme
- Propose core and optional strategic themes for them to explore
- Support additional capacity within CHT

Conclusions

The Review process has demonstrated that CHTs have the capacity to be key delivery agents for the sector's priorities, given the right level of financial resourcing and expert support and guidance from HES. Central to their ability to deliver is their relationship with HES as their main funder, and with their local partners. HES remains committed as an organisation to the CHTs and looks forward to working more closely with them in future.

Historic Environment Scotland is the lead public body established to investigate, care for and promote Scotland's historic environment.

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