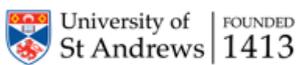




Community Heritage Scotland DISCUSSION DOCUMENT

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February - July 2018



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Section 1

Introduction

Community heritage is riding high in Scotland in many respects – in terms of interest, commitment, energy, engagement, and truly superb outputs, plus an increasing confidence and awareness of its own value in the wider heritage sector.

Recognising and celebrating the achievements of the sector is vital, but alongside this is a need to listen to the often-articulated needs of the sector itself. This project grows precisely out of these two angles, seeking to start drawing together the strands which will help communities to manage their heritage, and in turn for people to be served by their heritage.

This document may seem to dwell more on challenges than celebration, but the intention is to tease out issues and bring people together to try and find some solutions. What is not in question is the value and excitement of community heritage: that is the bedrock to the project.

It is important to note that this is only the beginning – a short survey, one meet-up, and a deliberately open and occasionally provocative discussion document. There is a great deal more talking to be done, and this should take place in and with communities. Only then would it be right to start talking about a strategy for community heritage.

An additional short ‘next steps’ summary will give an outline of the project so far, and where it might go.

Discussion not strategy

This paper is offered as a discussion paper and is not intended to serve as a strategic document. The observations it contains are based on a first scan of the extensive and complex data from the survey – and are just that, observations. Alongside this are comments, underlining that this short project is only aiming to open up an arena for discussion. This is effectively a record of the project and discussions so far – survey outcomes, internal discussion in the project team and with the steering group, in emails with people who have corresponded, with the participants at the meet up.

It was originally written as a live document alongside the gathering of the data, picking up on themes and patterns as they emerged. There is still a great deal of work to be done around specifically evidencing points, and this document is necessarily a first response in a very short project which was only active and funded for around 12 weeks. It incorporates information and views gathered at the well-attended and lively meet up event at Birnham.

In its current form as presented here, it includes **authored comments** from members of the steering group which was drawn from some (but by no means all) sections of the heritage community. These are shown in text boxes throughout the document.

The commentators are sector leads Archaeology Scotland (green), Museums Galleries Scotland (orange) and Historic Environment Scotland (blue), University of St Andrews (pink), and by community heritage representatives from the High Morlaggan Steering Group (MRSBG) in red. We have added comments (in purple) ourselves to reflect addition and ongoing developments.

Who are we?

A consistent question throughout the project has been ‘who are you’? The full steering group and project development process is covered in more detail later, but an introduction to the core team feels necessary at the top of this document.

The answer is ‘we are grass roots’. It is an unusual scenario – a project with national scope being run by a group which is not part of any sector lead organisation, but it has been brought about by people working and volunteering in the community sector. We are genuinely an independent grouping of people with a pedigree in community heritage.

The project has been developed and is being run by Ergadia Museums and Heritage in collaboration with Northlight Heritage. Ergadia is a small consultancy which works almost exclusively with community heritage, and especially more rural communities. Northlight is a larger organisation with similar credentials veering more towards place-making and whole community projects, and with a slant towards archaeology. Both are third sector organisations – Ergadia is a ‘not for profit’ company limited by guarantee, and Northlight is a charitable trust.

We feel we can claim sound knowledge, experience and empathy for community heritage on the ground. This is not the same as saying “we represent you”, and if we are fortunate enough to be able to progress the project further then, in line with much feedback, we will be aiming to ensure full and democratic representation from across the community heritage sector.

CVs for Ergadia team members can be found here <https://ergadiaheritage.com/about-ergadia-museums-heritage/>, and Northlight here <http://northlight-heritage.co.uk/conc5/index.php/team/>

All about information

Thanks to Historic Environment Scotland who funded the first stage of the draft, we have been able to finally get this project off the ground. The intention was always to start with gathering data, and a survey has been at the core of the work. There is real scope for mining the data further, breaking it down and extracting really important information. There is also a myriad of questions which will repay further research.

The survey is offered discretely as Section 4 rather than incorporating it into the document, as it is now being actively worked on with museum studies researchers at the University of St Andrews and will yield more complete analysis in time.

As part of gathering information, we had hoped to do some useful comparisons with other networks to support the possibility of creating a new one for community heritage, and to select case studies. It quickly became clear that it was premature to select models, and that more discussion with the sector itself is needed.

The process will also include examination of existing mechanisms which could be adapted for delivery of Scotland’s community heritage (such as the Community Heritage Conference).

All this only confirms that we need to allow more time for the project to develop, and that presenting this document as an informal prompt for discussion, disagreement, and ideas is the right way to go for now.

Early responses from some of the organisations represented on the steering group have been encouraging, indicating that they will be working with the data to address questions which relate particularly to their remits.

Museums Galleries Scotland (hereafter MGS) are finding the survey data very useful and have already started examining it with particular reference to training needs articulated by respondents. MGS are delighted with the number of independent museums which responded to the survey, and the outcomes will be feeding into discussions for their forthcoming national strategy review. They are keen to continue working together collaboratively with the steering committee to build on support for museums in the community.

Further work still needs to be done – certainly some case studies, but as Archaeology Scotland has made clear, to ensure they are useful we first need to decide what we want to learn from them and be rigorous in the process of selection of subjects.

We are always open to feedback, so please feel free to feed your responses back to us at info@ergadiaheritage.com.

E/N: Thanks to Dr Karen Brown at the University of St Andrews, the project has now achieved international exposure at the EU LAC conference on community museums at Valencia and useful advice is being offered from projects as far afield as Mexico. The process for selection of case studies should be rigorous and wide-ranging, but further research is needed before we can even reach that point. It is increasingly clear that community heritage is globally extremely active, and that while Scotland's communities are delivering outstanding heritage work, the overall framework and strategic management lags behind practice elsewhere. Identifying the right case studies should be a major goal for the next stage of the project.

Background

Community Heritage Scotland arose out of the sense of a need for positive change in the community and independent sector. This was based on feedback, and sometimes vocal calls to action, from people working and volunteering in community heritage and independent museums across Scotland.

AS: It has coincided with some thinking around Scotland's Archaeology Strategy and the need to understand better who is doing what in Scotland, particularly around lifelong learning opportunities.

The sector is growing rapidly and has changed markedly over the past 25 years. Some change has been organic, based on social development in communities, but there have been at least five key external factors that have propelled the sector into its current status:

1. **Heritage Lottery Fund [HLF]**. This has been the primary influence on local heritage in Scotland since it was launched in 1994, and has enabled many projects to develop from scratch, as well as allowing countless projects to go ahead. At the same time, it has led to disparity between projects which have the skills and capacity to apply for funding, and those which have not. Alongside the better equipped independent heritage organisations, there continue to be those which have never applied for HLF grants, and have remained fairly static, often operating on tiny budgets.

2. **Local government reorganisation.** The shift of direct funding for independent museums from district councils to unitary authorities after reorganisation in 1996 was a sea-change with winners and losers; the pattern of which endured and is only now levelling out as all councils cut their museum costs to the bone. In addition, taking place so soon after foundation of the HLF, it created a confusing pattern of funding with councils' commitment to both local museums and match funding varying considerably.
3. **Development Trust Association Scotland.** DTAS was founded in 2003 to support community-led regeneration and began to normalise community management of assets and projects (following early ground-breaking cases such as Assynt and Eigg). It provided both active support and, critically, recognition of heritage as a social and economic regenerative tool. In this it expanded the pioneering work of regional bodies such as the Highlands and Islands Development Board to cover the whole country. There are now around 250 development trusts in Scotland.

Note: The notion of community heritage covering various types of project and output begins to emerge around this time, marking a change from the network of independent museums and historical societies which had been more or less the only recognised mechanism for community-run heritage.

HES: We also feel that the localisation agenda from Scottish Government since 2007 is another key driver, particularly for government. (This can be seen in their [Principles and Priorities: The Government's Programme for Scotland and in the national outcomes](#).)

4. **Community Empowerment Act Scotland 2015.** With parallel funding support offered by the Scottish Land Fund, this has enabled communities to buy local assets. These comprise both land and buildings; inevitably many of them older and often Listed buildings such as town halls and large houses which have fallen out of use. This has coincided with a rash of **Capital Asset Transfers** – typically schools, halls etc - as local authorities seek to jettison property and cut costs. Overall this has contributed to a substantial rise in the amount of real estate owned and run by local community groups, and correspondingly a rise in social enterprises as communities strive for sustainability.
5. **Historic Environment Scotland [HES].** Historic Scotland and the Royal Commission for Ancient and Historical Monuments merged in 2015 to become Historic Environment Scotland. A great upheaval with a new mission and priorities, it is continuing to shake down in its role as the dominant heritage body in Scotland, as reflected in the existing overall National Cultural Strategy which is currently under review, and Our Place in Time, the Historic Environment Strategy for Scotland and Scotland's Archaeology Strategy. Communities have become a key target for engagement initiatives including as potential managers of their own heritage assets, a combination which has noticeably raised the level of expectation on local communities over the past 2 years.

Within the archaeology sector there has also been a drive in the last 15 years towards increasing skills and empowerment for communities through organisations like Archaeology Scotland, SCAPE and the wider community as a whole. [It is worth noting the following national programmes that have been delivered over the last 15 years:

- Adopt-A-Monument
- Scotland's Rural Past
- Scotland's Urban Past
- Scottish Coastal Archaeology and the Problem of Erosion (SCAPE)]
- Scottish Graveyards Project

HES: A key driver is Our Place in Time - The Historic Environment Strategy for Scotland <http://www.gov.scot/Publications/2014/03/8522> . developed by the people of Scotland. The decision to create a new lead body, to be called Historic Environment Scotland, was made in the context of the development of Scotland's first Historic Environment Strategy: Our Place in Time. Through this flows the Archaeology Strategy and policy reviews such as What's Your Heritage that look to engage local communities further.

Developed by and for the whole sector one of the key aims of Scotland's Archaeology Strategy from 2015 to 2025 is:

- *to broaden and deepen the impact and public benefit of archaeology within and beyond Scotland* through communication and innovative practice, to foster a culture of collaboration and ambition locally, nationally and internationally.
- *to enable and encourage engagement with our past through creative and collaborative working, active involvement, learning for all ages and enhanced archaeological presentation* to maximise the role archaeology can play in learning for people of all ages, benefiting from everyone's contribution towards valuing, understanding and promoting our past.

AS: I think it's interesting to note that the community, voluntary sector and heritage NDPB's (*non-departmental public bodies*) are more influenced by historic environment strategies but museums have their own strategy. Scotland's Archaeology Strategy looked closely at the museums strategy but the Culture Strategy remains somewhat removed from our sector and this ought to change and become more integrated. We need to start showing how community heritage can help deliver the higher level strategies (Scotland Performs) – that's a role for the NDPB's and voluntary sector organisations but we need time, space and resources to do so.

MGS: Likewise for museums – the main driver in the National Strategy for Scotland’s Museums. With the six high level “aims” driving the focus of our funding programme, advice and training activities.

1. Maximise the potential
2. Strengthen connections
3. Empower a diverse workforce
4. Forge a sustainable future
5. Foster a culture of collaboration
6. Develop a global perspective

Likewise the Museum Accreditation Standard provides a basic standard for Scotland’s museums and enabled us to support development activities.

The process of communities taking on heritage assets is very much live and ongoing, and it is probably too early for useful statistics showing level of take-up. Our own experience is that communities are welcoming the opportunity to manage their own assets, with the caveat that there are also reports (verbal – not formal) of situations where the community is being encouraged to take on assets beyond their own ambitions, and this has not always been welcomed. Either way, there are significant challenges which are increasingly being articulated from within the sector itself, notably (but not exclusively) around capacity.

In addition, in the midst of all the change that has occurred and the crescendo in the last two years, there is now a fundamental question around what constitutes community heritage; how can it be defined and where are the boundaries? Also - who is doing what, and where are they doing it?

The traditional structure of independent museums and historical societies has been overwhelmed by diversity and expansion of remit and activities, and all at a rapid pace of change. Museums and historical societies remain core organisations but are sometimes not even touched tangentially by heritage projects which happen independently of the old certainties of a building or museum collection, becoming bypassed by intangible heritage, free-rein activities, and landscape initiatives. Digital access and the ability to generate content have added to the democratisation of heritage, delivering access which no longer depends on the complicity or input of ‘experts’ (in that they are now rarely involved at core level, except in the case of archaeology projects where professional archaeological input is still strong. They are more likely – if at all – to be brought in as required.

In essence, community heritage has become a self-generated, ‘own work’ scenario, as local groups and individuals respond to an impetus to develop a heritage project and just go ahead and do it, fostered by the new atmosphere of encouragement around community activity generation. However exciting this undoubtedly is for the sector, the survey respondents have clearly indicated that they need professional support and expertise, and that they are left having to overly rely on volunteers. All round this poses questions about the role of expertise in managing often complex heritage.

While considering the extent and scope of this burgeoning sector, there are increasingly calls from within people and independent groups involved in managing their local heritage to take stock of the impact of rapid change, and this project aims to start addressing that.

Community Heritage Scotland project development

The project has been developed by Ergadia Museums and Heritage, a consortium of museums and heritage freelance professionals who work almost exclusively with community heritage and understand the sector well. They have been joined by Northlight Heritage, expanding the skillsets across archaeology and a wide spectrum of community heritage and place-making activities.

The initial development of the project was undertaken on a pro bono basis to enable it to move forward. This Early Stage Engagement Project represents the first funded phase.

The route to the current position has been:

- 2015 Initial discussions with leading stakeholders about the potential for a national survey of independent museums in Scotland to address shortfalls in knowledge.
- 2016 Development frustrated by lack of organisational structure for attracting funding. St Andrews University Museums Galleries Collections Institute (MGCI) agree to act as umbrella organisation to facilitate process and grants.
- 2017 Parameters expanded to include all aspects of community-driven heritage.
June: meeting of key strategic stakeholders held in St Andrews, attended by St Andrews MGCI, Historic Environment Scotland, Museums Galleries Scotland, Archaeology Scotland. Agreement by all stakeholders to be involved, and for project development to go ahead.
November: project presented to Community Heritage Conference, with agreement to proceed endorsed by a clear majority vote.

The Museums Galleries Collections Institute (MGCI) at the University of St Andrews is the umbrella lead for the project, serving as a valuable administrative and charitable structure and a non-aligned and secure repository for raw data from the survey. They also provide a natural home for the research which is an essential part of this early stage project, and which they have identified as a goal for MGCI going forward as it aligns closely with their management of the international EU-LAC-MUSEUMS project on community museums and sustainability.

Active stakeholders so far are:

- Museums Galleries Collections Institute, University of St Andrews: Dr Karen Brown, Ann Gunn, Dr Ulrike Weiss
- Historic Environment Scotland: Laura Hindmarch, Eve Boyle
- Museums Galleries Scotland: Loretta Mordi
- Archaeology Scotland: Eila Macqueen

Representatives from the community heritage sector are part of the early phase project on an invited basis. The intention is to enable people to put themselves forward for involvement once the database mechanism is in place. In the meantime, they are:

- Sue Furness - High Morlaggan township project, Argyll.
- Susan Kruse - ARCH Archaeology for Communities in the Highlands.
- Bob Hay - Lismore Museum
- Andrew Johnson - St Andrews Preservation Trust

Historic Environment Scotland have shown vision and generosity in providing the 75% of the funding and enabling the project to launch, with some additional funding provided by Museums Galleries Scotland, the Association for Independent Museums and University of St Andrews. Archaeology Scotland has provided strong in-kind support. Ergadia and Northlight continue to commit substantial pro bono time as a contribution to the funding package.

HES: We grant aided this phase of the project as it aligned with the aims and objectives of Scotland's Archaeology Strategy – www.archaeologystrategy.scot, particularly around Encouraging Wider Engagement aim. The Strategy is all about collaboration and working together. It is sector led with Archaeology Scotland being the lead body for this aim. To help deliver this aim, Archaeology Scotland set up an Archaeology and Learning Working Group (ALWG) with a focus on archaeological education. This group outlined opportunities and challenges. One of these was that it was hard to deliver elements of the strategy on lifelong learning opportunities as they didn't have much information on what was going on across Scotland at a community level. This year, to help deliver information on this, we grant funded the first phase of the Community Heritage Scotland (CHS) project, which is a national survey. The benefit of this project was it was working with the museum sector and would allow us to reach new and different audiences and provide additional benefits to both parties.

The project also wanted to scope what was out there in relation to community networks for archaeology. We felt, as well as being potentially beneficial to help us to encourage wider engagement, there was also possible benefits in scoping what was out there to communicate more meaningfully with community groups carrying out archaeology nationally across Scotland. We felt the project provided an opportunity to find out if communities were interested in this.

We welcome the views of local communities and will take the results of this project going forward to look at what we can do to help going forward that might be able to address what has been raised.

Broad aims and objectives

The aim of the overall community heritage project is to improve knowledge and understanding of the sector in order to develop clear and effective strategies to support it going forward.

Issues facing the sector have been broadly articulated, principally around lack of knowledge of who is participating, capacity, and outputs, together with the lack of agency nationally.

HES: As this is a broad study some of the issues raised may be more applicable to some sections of the heritage sector than others.

The broad aims for this project were to develop a bottom-up, collaborative approach to try to address community groups' needs and opportunities and provisionally (dependent on consultation outcomes) encourage:

- creation of a community heritage network
- a community voice at a national level
- a community-led approach

- improved lifelong learning opportunities
- diverse and new audiences

HES: We also feel that the project has the potential added benefit to allow national organisations to engage with local communities more easily to share opportunities and advice where needed.

Although some work had been undertaken in 2010 in the heritage sector (<https://www.museumsassociation.org/download?id=227823>), and an audit of all Scottish museums in 2001 (no link available, contact Museums Galleries Scotland if required), all studies are out of date both due to both the passage of time and the major government and sector initiatives which have impacted on community heritage. There are key gaps in knowledge concerning existing groups and societies across Scotland, ranging from basic knowledge of who is doing what and where, to aims and objectives, outputs, and capacity. This project is the first to focus solely on community-driven heritage, without the imbalance which larger or statutory organisations can bring to surveys and data.

Divisions between disciplines, such as museums and wider heritage activities, are also not necessarily readily discernible to people working and volunteering in the independent sector. Their sense of place and community is more holistic. By collaborating across the parameters of community heritage activity this project provides an opportunity to gain a better understanding of the broader sector. It should also add value by engaging with a wider audience as it goes forward.

Early Phase Engagement Project – approach and methodology

The scope of this early phase project has necessarily been limited, but a few carefully targeted actions have the potential to achieve useful outcomes long term by:

- Opening a conversation about the community heritage sector.
- Creating a platform to support informed planning of the wider project.
- Taking positive steps towards effective models for networking and strategic planning.

Key issues going into the project were identified as:

- There is no clear definition of what community heritage is.
- There is no central knowledge about who is doing what and where.
- The diversity of the sector is its strength but can also be a weakness.
- There are many networks and forums but minimal cohesion across the community heritage sector.

The **aims** of the early phase project were:

- To gain a better understanding of who is doing what and where.
- To explore the potential models for a national network.
- To expand understanding of the community heritage sector's capacity, activities, opportunities and needs.

These were achieved by taking the following **actions**:

- Inviting all participants to complete a survey about their project or organisation, with key questions around status, activities, engagement, and capacity.
- Encouraging individuals and groups to sign up to a contact database.
- Bringing members of the new network together at **Community Heritage Scotland - Going Forward**, an open meeting/event day held centrally in Scotland.
- Reviewing existing comparative models for similar networks to recommend a best practice sustainable approach going forward.

The **core outputs** are:

- Copy of the survey data (encrypted)
- Final Report on Survey Information
- Database of individuals and groups
- Report on network models and recommendations

Overall this Early Phase has been characterised by enquiry combined with options for creating robust structure as a pathway forward for the next stage. It was never intended or feasible that this phase would have the capacity to deliver strategic detail, but rather provide the tools to start the discussion.

Delivering the project – challenges and findings

Aside from the actual survey data and research, this first short project proved to be a significant test of how the heritage sector works on a national, local and internal level.

Reaching communities

The physical process of getting the survey out to the right people and organisations was challenging and labour intensive.

The survey and communications were extensively circulated through a variety of digital means:

- Through the networks of sector leads (HES, MGS, Archaeology Scotland etc).
- Through secondary networks circulated from the first mailing, with follow on circulation by groups and individuals.
- Through specific targeting of organisations identified by the Ergadia/Northlight team.
- Through broad spectrum digital marketing.

Despite this, the reach was patchy. Some organisations notified us (either directly or via lead organisations) that they had received the survey email multiple times, while throughout the survey period we met people and groups as part of our other work projects who had not received it at all.

Some of the major participating organisations had extensive networks but their connections were with known circuits rather than the overall community heritage sector. The process demonstrated beyond doubt that there is no effective or core network covering the whole diverse community heritage sector.

National networking

Participation by Historic Environment Scotland, Museums Galleries Scotland, Archaeology Scotland (and of course University of St Andrews as the lead partner) on the steering group was a priority and a starting point for the project, a position which has since been echoed by responses in the survey which support a collaborative approach going forward. This looks set to be expanded with new national participants in subsequent phases.

However, an interesting observation of the project process has been that there seems to be little working connection between national-facing organisations in the different sectoral disciplines. For example, museums and galleries appear to operate in isolation from built environment and archaeology, and in discussions with organisations such as libraries it was found they similarly have minimal contact with organisations at a distance on the heritage spectrum.

Sector leads and intermediaries on the steering group have indicated that they do work together and have questioned this observation (which was initially just empirical evidence from the project process). However, it seems to be supported by the survey, with respondents referring to frustration with what are described as ‘silos’ at a higher level.

Taking all comments into consideration it seems likely that all perspectives may have an element of truth, but it does suggest that if networking at high level is happening, it is not filtering down or visible to people involved with community heritage.

This is also reflected in survey responses citing difficulties of access to national level organisations, and overly complicated multiple routes to different funding sources. A key request was articulated in the survey, at steering group level, and at Birnam; that national organisations and funders to present a unified system of support and funding which is better tailored to the needs of community heritage organisations.

After all the discussion, the conclusion from the community heritage perspective is still that there is a significant disconnect within the operation of the heritage sector as a whole in Scotland. This could be seen as being highlighted by the distinctive demands of the rapidly growing and confident community heritage sector which is asking questions of a system which continues to run along largely traditional lines.

A skim of the survey data and top-line analysis will bear this out, with the need for genuine partnership working, crosscutting activity and wider vision showing as a recurring theme.

Note: for a discussion of the extent to which the community heritage sector networks amongst itself see ‘Is there enough genuine networking and partnership activity?’ later in this document.

HES: Our organisation is committed to working collaboratively, both with other national organisations as well as with those in the historic environment sector, including communities to help Scotland understand, protect and value its cultural heritage. Although this can be difficult at times as there are many organisations and groups all with different roles and remit, our aim is to **“never miss opportunities to work together and learn from each other”**, which is one of the reasons for funding this community driven project.

Some of our recent initiatives through [Our Place in Time \(OPiT\)](#) bring organisations, groups and individuals from across the historic environment sector together at a strategic and working group level to focus on key areas that include: Heritage Tourism, Volunteering, Built Heritage Investment and Climate Change.

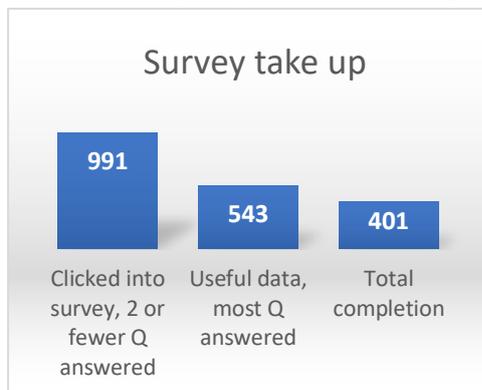
[Scotland’s Archaeology Strategy](#) is delivered by a committee made up of representatives from across the sector. To help them, the lead bodies for each aim bring together individuals from local authority archaeologists, universities, archaeologists, teachers/higher education staff and museum staff through working groups to help deliver improvements. We are also trying to include wider involvement and collaboration through our website and the many projects helping to deliver the Strategy.

Engaging individuals at local community level can be hard due to time pressures, geography and knowing who to contact but we are keen to do this. We hope that this project will help us do this more effectively.

E/N: Funding has been identified as one of the root causes of difficulties in working effectively together, and this was raised on several occasions during the project: whether trying to navigate all the different funds as a community organisation, or securing and keeping it as a sector lead, or the responsibilities of each grant-giving body as a funder. Representatives from the community heritage sector reported finding it impossible to get lead organisations to work together on often simple projects, which can and have stalled as a result.

Response and Survey Feedback

The survey yielded 543 useful sets of data, with 401 completing the entire survey at a 74% completion rate. The survey was clicked into 991 times with people completing one or two questions or less. Anecdotally we heard that people started but realised it wasn’t aimed at them – several from national heritage organisations. Most people were generous when faced with yet another survey, with only 5 (i.e. 0.5%) sending complaints or comments about the survey itself.



However, we received a fairly constant stream of direct emails from people welcoming the initiative and asking how they can support it going forward or asking to be kept closely in touch. We had emails from organisations keen to tell us what they were doing. We were invited to contribute to or attend three conferences or seminars to talk about the project during the 8 week active phase of the project.

It is important to note that this group of 543 respondents represented the engaged part of the sector. We also heard anecdotally of groups and people who were varyingly hostile to the survey, typically: “Why should we do this – we have our own local network”.

“This doesn’t apply to us”.

Tensions between neighbouring community heritage organisations were apparent on some occasions. While not hostility, there was sometimes confusion about the fact that the project had grown up from the community sector itself, rather than being delivered by a statutory body which would perhaps be the more usual source of surveys and strategic work.

Overall the steering group is very much aware that not every community heritage organisation or individual has been captured by the survey, and that there is more to do.

The discussion day event Community Heritage Scotland – Going Forward was scheduled for 3rd March, to be held in the North Muirton Hall in Perth. It was quickly booked up, with a waiting list in double figures. It had to be cancelled due to the weather and was rescheduled for 21st April in the larger venue of Birnham Arts & Conference Centre with capacity of 120.

Take-up of the event exceeded expectations and can be taken as a clear expression of interest and commitment to the project.

What is ‘Community Heritage’?

Terminology

This project originally grew out of a mission to explore the independent museum sector but evolved to include a much broader palette when it became clear that they were only one section in the reach of heritage in communities. Furthermore, the term ‘independent museum’ only refers to their status rather than describing what they do.

‘Community heritage’ has been adopted as a term for this project, growing out of the aims and outputs of the Community Heritage Conference run by HES and Archaeology Scotland. There is no attempt made here to define it as that is for further discussion, but our premise works on a general understanding that community heritage amounts to a broad range of heritage-based perspectives and outputs developed and run by communities themselves.

Status

Delivering heritage in communities is, of course, not solely the preserve of community heritage organisations. This project has certainly thrown up some confusion among respondents to the survey from larger organisations who do work with communities.

A key designation lies in status and funding: community heritage refers to organisations/individuals working with heritage in their communities which do not receive core funding through the state heritage system: they are independent.

The museum sector provides a useful model for this discussion, as their classification as ‘independent museums’ is well-established with Museums Galleries Scotland as the National Development body for museums. It should also be noted that the same status applies to all community heritage groups or projects, just without the recognised formatting.

The full set of museum classifications plus other leading heritage managers (exception National Trust for Scotland with established membership + portfolio) makes it clear:

Nat Museums	Loc Auth etc museums	University Museums	HES	Nat Lib Scot	Nat Archives	Nat Heritage	Community heritage
Core funding	Core funding	Core funding	Core funding	Core funding	Core funding	Core funding	No core funding

There are variations:

- After the Scottish Museums Think Tank in 2000, the industrial museums (all independent) made the case for and gained special group status and core funding as national specialist museums.
- In some rare exceptions a small amount of core funding creates a straddle between state and independent management of a heritage site (typically), but the overall status is still independent trust.
- A small number of independent museums continue to receive annual grants from the local authority, depending on local policy, to support their running costs. Most do not, and those that do are dwindling, with even the most aware local authorities (such as Highland Council) are planning to phase them out.

Museums Journal news 29.3.18

None of these revenue grants make up the majority of income, which continues to be overwhelmingly self-generated.

The Museum of Lead Mining in Wanlockhead, Scotland’s highest village, has had its budget cut by a sixth after Dumfries and Galloway Council reduced its annual contribution from £25,000 to zero for 2018-19. The decision was confirmed at a meeting yesterday.

Wanlockhead Museum Trust, the volunteer-run organisation which manages the museum, had a total income of about £150,000 in 2016-17 and spent around £90,000 on wages and salaries. The venue employs one full time staff member and about 15 part-time seasonal workers.

In addition, the independent sector not only does not have an annual core grant but is expected to do all the same

work in reaching audiences, looking after collections, delivering learning and so forth, on top of which they have to spend a lot of time and energy on the following:

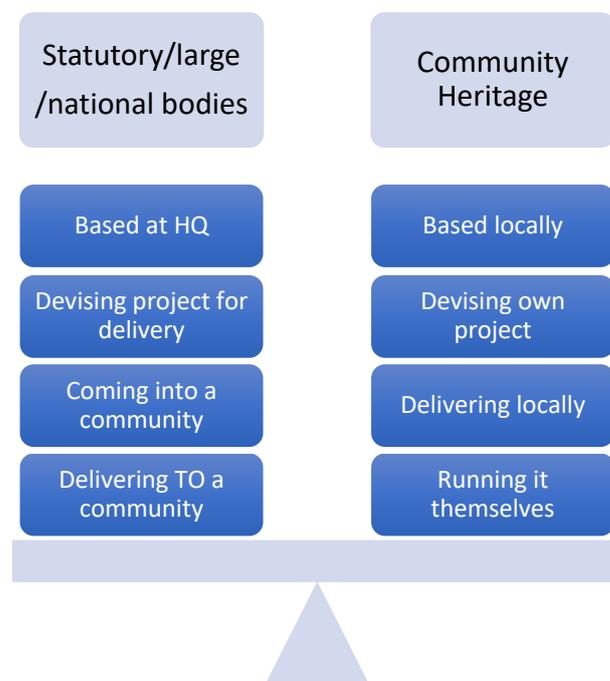
- chasing donations
- chasing sponsors
- operating friends schemes / regular giving schemes
- fund raising events
- renting out rooms
- running gift shops / thrift shops
- running a cafe
- getting some / all of the tasks done by volunteers

- finding and managing volunteers
- trying to save costs / share costs.

Generation and delivery

Aside from funding, the distinction between statutory organisations and community heritage is also around where the wellspring and delivery of activity starts from.

The 6 month AHRC-funded study by Alex Hale in 2011 on [Linking Communities to Historic Environments](#) contains findings and recommendations which remain pertinent 7 years on, but in this immediate context identifies ‘top down’ and bottom up’ generation of community engagement projects, represented by the graphic below.



There is a third ‘middle way’ which combines the two, with varying levels of bringing in expertise as required. An example of this is Archaeology Scotland’s Adopt-a-Monument scheme which is community-led but professionally supported.

There are also intermediary organisations who act as important enablers, providers, and advice hubs and which are neither core funded statutory lead bodies, nor organisations/projects which grow directly out of communities. Typical of these is Archaeology Scotland, which is membership-based while relying on core funding for which they apply as a grant. The Architectural Heritage Fund relies strongly on core-funding from HES but fulfils a specific advisory and small grants role. It is notable the majority of these organisations are connected to built environment and archaeology, which are the primary remits of HES.

This group is a broad church, with some enablers also functioning as networks ([Society of Antiquaries of Scotland](#)), adding to questions around form and function of networks around Scotland.

However, a notable distinction is that while these groups work with community heritage, they have not grown organically from it and are not nested in a specific community. More work is needed to add this important sector into the discussion of the framework of community heritage in Scotland.

HES: Another difference with statutory organisations is the additional services they are also delivering to communities (on top of national enabling projects and site/collection/archive management) – such as regulatory services (designation and consent), advice both statutory like planning and wider technical advice on management/good practice, advice to Scottish Government more generally, grant funding, national statistics and so on.

MGS – agree with this

AS: It would be nice to see some more positive things in the report. We have a vibrant community and voluntary sector in Scotland. We have a supportive new lead body, HES. We have opportunities.

Agree – MGS also undertaking a strategic review and refocussing of engagement with museums sector in Scotland

E/N: It is important to be clear that there is no single lead body for heritage in Scotland. Despite the dominance of HES it does not speak for any sectors apart from built heritage and environment, and archaeology – and there are many community heritage projects which do not involve any of these. HES does not cover museums and collections (other than their own), archives, libraries, historical societies and general non-specific community heritage activity such as social/health facing activities, performance, music, arts/crafts, learning and so forth which often focus on intangible heritage or non-object/building based themes. These elements may be part of HES funded projects, but that is different from independently developed projects which pursue these activities for their own sake. In our view the perception at national level that they are the lead or central body is unhelpful and restrictive for communities managing their heritage. The problematics of lead sectors being able to work effectively – and equally – across all aspects of heritage in Scotland has been articulated repeatedly during this project and emerges in various ways through the survey. A more effective model needs to be articulated and put in place in Scotland.

Outputs

None of these boundaries help to describe what ‘community heritage’ covers or does, or indeed should do. It remains a core question for discussion, and as a starter platform these are some observations:

1. Community heritage is managed and/or ‘owned’ directly and solely by a people from a community or individuals.
2. Community heritage is not defined by industry sectors (museums, built heritage etc) but by people: how they deliver and engage with their heritage, and what it brings to a community.

3. It covers a wide variety of activities around a shared interest and theme of heritage. As such, it defies the categorisation offered by the existing structure of statutory bodies which are clustered around heritage type.
4. It is suggested that it may not be useful to define community heritage by a single term, but rather that it represents a shared purpose, for example: *the ambition to deliver community interest and benefit through heritage based activities.*
5. ‘Community heritage’ includes a wide range of organisations, groups, and individuals involved directly in their heritage, but potentially also other individuals tangentially involved (as revivers of heritage skills in an artisan bakery) or perhaps participating in activities regularly or as a one-off.

Alternatively, it may be that there is no need to find an exact definition of the sector, which would be self-defining through participation and take-up. This is echoed by Alex Hale in *Linking Communities* who suggests that definition could be perceived as exclusion:

...the inclusiveness of the term is considered an important strength, based on the assumption that any person or group of people wishing to engage with any aspect of what they consider to be a part of the historic environment, should be considered to be part of the 'community'.

USTAN: Although there is a resistance to “defining” community heritage, in the next stage the governing group would do well to come up with a mission statement; one clarifying among other things the role of community-level agency in decision making as the movement goes forward.

Communities and heritage – understanding the perspective

Perspective is a core factor in understanding community heritage, in that there are different lines of sight between the statutory bodies and the communities managing their heritage. In the simplest language, it is about ‘coming at it from different places’.

There are shared activities – such as direct management of heritage – but at a fundamental level statutory heritage does not occupy the same space as community heritage.

Statutory organisations such as HES, and MGS are strategic top-level organisations charged with enabling and sometimes managing heritage, with clear mission and parameters under tightly controlled governance. Intermediary groups such as Archaeology Scotland are sector leads with a national focus and a more engaged delivery on the ground (active projects). Community heritage is a bespoke and complex spectrum of individual people, organisations, activities, and governance models.

This graphic below is simplistic but aims to capture the distinction between organisations such as HES and MGS as primary enablers, and the community heritage sector as 100% deliverers – while continuing to reinforce that their governance and funding are wholly different.

- Paid staff [some volunteers in service roles].
- Statutory governance model.
- Enabling management of all heritage [some direct managing].
- Rolling out corporate /national policy.
- Core funded.
- Spending off budgets.
- Holders/dispersers of national funds.
- Some business enterprise.
- Protected risk/liability.
- Providing advice

Statutory bodies

PRIMARY ENABLERS

- Volunteer organisations with some paid staff .
- Bespoke/own governance model.
- Independent ownership/ management of local heritage.
- Setting own mission statement, aims and targets.
- No core funding.
- Raising all funds/self-reliant .
- Running heritage as a business.
- Minimal protection as independent board members and trustees.

Community heritage

DELIVERERS

In addition to the operations and outputs, both ‘sides’ have their own ambitions for the roll-out of heritage in local areas and therein lie some major differences. A useful addition to this document may be an appendix outlining the top-line mission and aims of the various lead bodies in the sector.

All the sector leads, plus the major funders such as Heritage Lottery Fund and Big Lottery Fund (often a key funder for heritage enterprises), now have community engagement embedded in top-line aims to an unprecedented level, which in turn has created unprecedented interest in what communities are doing. This creates one perspective of demand leading to an inevitable question-mark about supply:

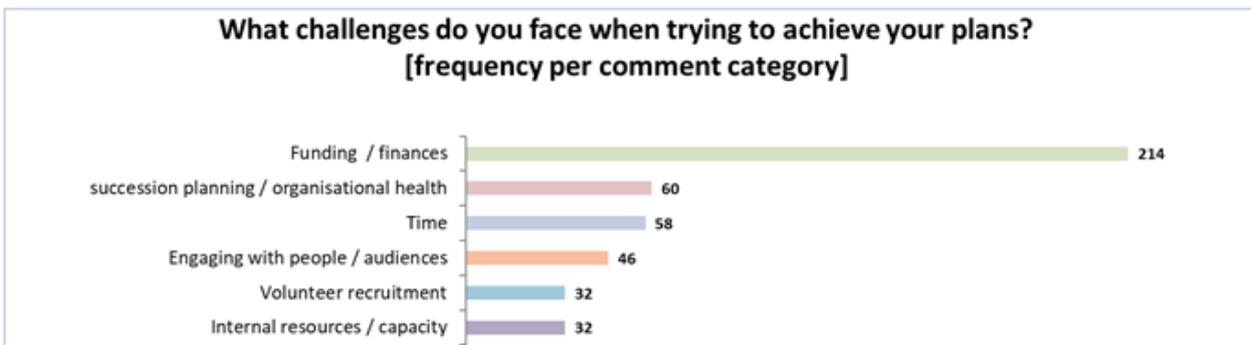
Statutory bodies/larger organisations	Community heritage organisations
<p>How can we engage better with communities?</p> <p>What activities are communities engaged in?</p> <p>How can we connect people with community-run heritage activities?</p> <p>How can we provide advice to communities about good practice/expertise?</p>	<p>We run activities/museum/events for local people and visitors.</p> <p>How can we do more projects and reach more people?</p> <p>How can we keep going when we are so short of money/time/volunteers?</p> <p>How can we improve our skills and capacity?</p>
: tapping into the resource	: delivering the resource

There is no conflict between these aims: all sector leads, funders and community heritage organisations share a common goal of connecting more people with heritage. This is clearly reflected in the survey findings with audience development and community engagement at the top of 'Plans for the next 2 to 5 years'.

Some members of the steering group (sector leads) have demonstrated the differing perspective, expressing a desire to gain a better understanding of what community organisations are doing, and how people can connect with them and participate in opportunities.

However, there is a potential disconnect where the core funded sector seeks to build partnerships around a resource created and delivered by an unfunded sector.

These dangers of a mismatch of supply and demand are not hypothetical; they dominate the survey findings – the upper section of the *Challenges* graph says it all:



A key question for consideration must surely be to create a better interface which enables both ends of the spectrum to function, and for community heritage to contribute to the national heritage sector in a sustainable way.

Quantifying community heritage

The problems within the community or independent heritage sector are empirically known on the ground: anyone who has worked in or with community-led organisations is familiar with the triangular deficit of money, time and people. What is missing, and this project is attempting to address, is evidence of the challenges from the community perspective.

The survey has been at the core of the project, and has asked:

- Who is doing what, and where?
- What would you like to do and what is stopping you?
- Would a network be a good idea, and how do you network at the moment?

It is clearly not exhaustive, and key areas such as quantitative/qualitative data on heritage and collections, diversity and equality, and other important areas were left out on the basis that this is

only the beginning, and that long surveys are more at risk of being abandoned. Baseline data was the key, and the relatively brief survey has been rewarded by a satisfactory response level.

It is the first time any organisation has attempted to speak directly to people engaged in community heritage through a national survey, specifically tailored to the whole broad sector rather than defined by the heritage itself and excluding all other players.

Previous national surveys, such as the National Audit of Museums and Galleries in 2000, included all museums, with the perhaps inevitable consequence that the independent museums gained minimal traction alongside the national, local authority and university museums, National Trust for Scotland and Historic Scotland.

The findings of the community heritage survey are extensive. Basic categorisation has been carried out, and the process of mining the data will continue as the project progresses.

Section 2

Exploring Heritage Network Models

Both the survey and the discussions devoted to networks at the meet up day showed that a network was a desirable goal. Exactly what form it would take is a subject for further discussion, and some hypothetical models are outlined as a prompt.

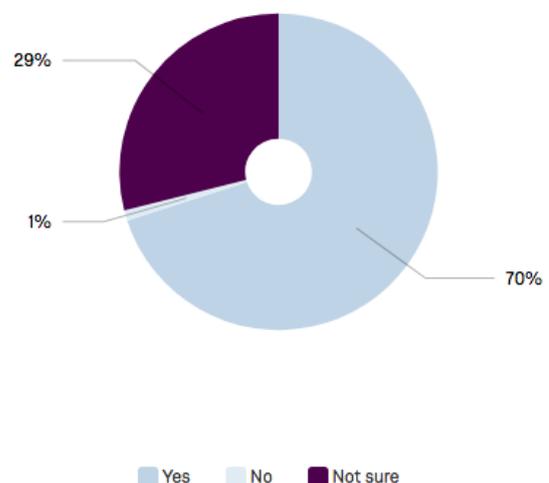
During the course of this project it has become clear that there is a great many heritage ‘networks’ operating in Scotland; the parenthesis around ‘networks’ because the nomenclature is hazy, with confusion around forums, networks, email lists and so forth.

It is has also become apparent that the networks are generally subject-specific but do not always regard themselves as so, with titles that imply a broad – even total – coverage of the sector while in fact they are historic buildings, or perhaps focused on history.

What has not emerged from the ongoing identification of networks is a single network which represents the interests of the community heritage sector as a whole.

The survey asked the question: *Do you think a heritage network for the whole of Scotland would be useful?*

It recorded 264 people for ‘yes’ to just 4 for ‘no’. ‘Not sure’ accounted for 109 respondents, opening up a healthy route for debate about if and how this might work.



Methodology

In this section we explore the nature of existing networks in order to inform discussion about the potential scope of Community Heritage sector network options in Scotland. In the first instance, there is a brief consideration what a network is and why the community heritage sector might want or need it?

We will then review some examples of existing networks relating to the heritage sector and beyond in order to learn how they function.

Ultimately, we will consider what insights have been gained from this rapid network review process, and from which consider more broadly potential different outline models and related issues for a community heritage network.

Networks and Forums

A network can be defined as ‘a group or system of interconnected people or things’. Networks can therefore be considered as an organisational tool designed to facilitate and maintain connectivity around a particular shared focus or issue. Connectivity requires awareness of the different parts to be connected and mechanisms to connect via communication and exchange of knowledge.

However, the organization of people and organizations into systems is not limited to issues of communication or knowledge exchange, but rather the organization into a system of previously un - or poorly - connected elements may have purpose to deliver on more specific shared goals.

For contrast another potential tool for connecting people or organizations around shared interests are forums. How then does a network differ from a forum? A forum can be defined as ‘a meeting or medium where ideas and views on a particular issue can be exchanged’. While a forum may connect people and organizations through dialogue around a specific issue, it could be argued that it may be more limited in the range of activities and systemic goals.

It should be noted that there are other organizational tools such as societies and associations which are used to link people around shared interests, and exploration of a network option implies interest in delivering on a number of key goals.

Insights from computer networks can reveal further issues about how they are structured or organized, complex networks (where each point is connected to each) are more resilient, where as a simple hub and spoke network is vulnerable to communication (and activity) breaking down when the hub no longer functions effectively.

This brief consideration of what a network represents highlights two key issues for developing effective network models for the community heritage sector:

- 1) Maintaining effective connections and communications between each element is fundamental.
- 2) Clarity of purpose and goals and reaching consensus as to how they are best delivered, is fundamental.

Bearing these points in mind we will now review examples of existing networks in the heritage sector and beyond.

Networks in the heritage sector

Collectively answering the question, why should we want or need a community heritage network, allows issue 2 (*clarity of purpose and goals*) to be addressed more clearly.

A recent example which provides one explanation of the aspiration and principles of networks in the heritage sector can be seen in the [Networked Heritage](#) initiative delivered by the RSA. It recognized the value of heritage in terms of localism and place-making agendas and recommended:

‘heritage organisations large and small to become more open and better connected—both within organisations and between organisations; within the heritage sector and beyond. This will support pro-active heritage citizens to step up as producers, participants and co-commissioners in managing and using heritage—already evident in many instances across the UK. We want to see a broad, inclusive and dynamic heritage model that delivers valuable, discernible social impacts. We call this ‘networked heritage’ ‘

It then sets out key reasons why heritage networks, at both local and national level, are important. Also of note in this context is the way in which the associated RSA [Heritage Index](#) project refers to six domains of heritage:

- Historic Built Environment
- Museums, archives and artefacts
- Industrial Heritage
- Parks and open spaces
- Landscape and natural heritage
- Culture and memories

It clearly demonstrates the breadth of interests which a Community Heritage Scotland Network could articulate.

USTAN: There are a number of short to medium- term funding opportunities available to keep the momentum going through workshops and networking, such as Royal Society of Edinburgh and AHRC grants. HLF theme of Community Heritage also obvious.

Heritage Networks in Scotland

The Heritage Sector in Scotland, if considered across the six RSA domains, is complex and diverse in terms of existing bodies, societies, trusts, forums, associations and networks. This section does not therefore attempt to exhaustively present and analyze all of these but rather

presents a series of examples of approaches to networking which can inform thinking about a potential Community Heritage Scotland Network.

HES: We also need a piece of work that looks at whether any of these networks/organisations could be fit for purpose to deliver what we want rather than re-inventing the wheel.

It should be noted, however, that several National bodies perform significant roles as sector leads such as Museum and Galleries Scotland and Historic Environment Scotland. Other organizations are membership based, including Archaeology Scotland, Society of Antiquaries of Scotland, National Trust for Scotland, and were formed for distinctive purposes but have important wider influence for example in terms of broader advocacy and capacity building. To different extents, such nationally operating bodies and organisations operating at a national level maintain networks around their distinct and overlapping interests but are not of themselves networks.

A significant group are the forums which often include 'heritage' in the title but have a strong focus around the independent museums. There are twelve in Scotland, and the list is currently being updated by Museums Galleries Scotland (more information to follow).

Organisations so far identified include:

- Built Environment Forum Scotland
- Scottish Local History Forum
- Scottish Museums Federation
- Association of Independent Museums
- STICK / Go Industrial
- Association of Preservation Trusts
- Heritage Trust Network
- Community Archaeology Forum (*UK wide*)
- Fife Heritage Network Group
- The Scottish Archive Network
- Heritage Volunteering Group (*UK wide with regional group - Heritage Volunteer Organisers Scotland (HVOS)*)
- The Conservation Volunteers
- Civic Voice
- Scotland's Sounds
- EU-LAC Museums (*EU Horizon 2020 consortium research project*)
- The Heritage Alliance
- RTPI Historic Environment Network
- Lanarkshire Heritage Forum
- Community Craft and Culture project (*USTAN/Scottish Funding Council*)

Useful social media models might be:

CHArts <https://www.chartsargyllandisles.org/>

Scottish Learning Group

<https://www.voluntaryarts.org/>

<https://dribbble.com/meetups>

USTAN: Some proper scoping of online tools that remote communities in Scotland engage with already would be useful to know the next way forward for the project communications – blogs, Facebook, Twitter etc. Also wiki can be a powerful democratic tool, as demonstrated by Scotland ICH initiative.

MRSRG: We need another step in the process to bridge the gap between the end of the current funding/production of the final report and whatever model we choose to pursue. This development phase should:

- Aim to reach more groups by a range of outreach approaches (e.g., contacting non-heritage-based networks, web searches, roadshow...)
- Set up a basic website to facilitate communication
- Gather more information on the types of heritage activities that people are involved in and consider how these might usefully be categorized
- Gather information on the wider impacts of engagement in heritage-related activities
- Identify relevant agencies and statutory bodies and keep them informed
- Further consider feasibility of various longer-term network options

How could this be achieved? By applying for a grant? This would have to be a project with its own self-contained benefits in addition to having the potential to support and inform any subsequent network plans.

Who might apply for such a grant? ‘Community Heritage Scotland’ as a constituted organization with a membership (= steering group?)?

What would a grant need to pay for? A person (appointed by membership/steering group?), travel, expenses, website etc.

AS: Totally agree there needs to be another step. Would suggest adding “reviewing other research” to the list above. There’s a current survey out about funding needs for example.

We believe that Built Environment Forum Scotland has offered to facilitate a discussion on the final report – we’d be in favour of that.

Less in favour of CHS being constituted at this stage. We have an example of how HLF have funded a consortium and if just needs a lead partner to do the application and monitoring etc.

Outline Community Heritage Network Model Scenarios

Should the final decision be taken to progress with a new network, there will be much to discuss in terms of its form. The models presented here by no means exhaustive and may prove to be quite different once further discussions are held with the community.

They are nonetheless presented as a series of incremental stages, with the first being the least complex and requiring least resource to operate. Subsequent models add further depth and complexity to the goals and aims of potential networks but would require additional resources to deliver further specific objectives and activities.

HES: Going forward the project should be encouraged to also assess more flexible and organic network options as well, such as forums. Although these may be more limited they are known to work well and may be more sustainable. The project should also consider existing networks/forums and whether these could be expanded or built upon.

MGS: MGS will not be prescriptive in what shape or form a Heritage Network should be. We however have 12 museum forums and networks across the regions that are operating effectively. The Highland Council Forum, Tayside, Fife and East of Scotland Museums Forums are examples of these.

Model 1 – CHS Communications Network

Goal: to deliver better connections and communications across community heritage Scotland

Aims:

- identify all community heritage organizations and participants who contribute to community heritage Scotland.
- regular communication about issues and events relating to Community Heritage

Minimum elements:

- Steering Group
- Website
- Mailing List

This model envisages a steering group of 6 to 8 people, who meet four times per year virtually and once per year face to face (potentially as session at Community Heritage Scotland Conference). It assumes steering group and contributors of content is provided in-kind.

AS: Community Heritage Scotland and Scottish Community Heritage Conference is confusing, especially when talking about different conferences/roadshows!
When Scotland's Community Heritage Conference went out and about a couple of years ago (3 mini conferences), it was well received but could have done with additional resources to follow up on actions probably. Roadshows are a good idea and should be built in to funding bid with associated costs for follow up actions

Costs:

Design of Website (potential for In-Kind)

Hosting of Website	Est £100
Print Costs – promotional materials	Est £150
Steering Group Meeting Travel Costs*	Est £800
Estimated Total	£950

*where appropriate one night accommodation and subsistence costs for annual Steering Group meeting

Income: possibility of small subscription / membership fee (e.g. c 100 people at £5 per year / c 20 organisations at £25 per year), possibility of donations and possibility of small grant applications.

MRSRG: We would not be in favour of charging a membership fee because of the risk of excluding particularly individuals or small organisations, which would inevitably skew the demographics.

Model 2 – CHS Advocacy Members Network

Goal: to grow capacity and skills in Community Heritage in Scotland ensuring more effective delivery and better recognition (by heritage professionals, organisations and local/national government) of what is delivered.

Aims:

- As far as possible identify all community heritage organizations and participants who contribute to community heritage Scotland.
- regular communication about issues and events relating to Community Heritage
- to collate evidence of and provide advocacy for benefits delivered through Community Heritage.

MRSB: We think this is a vital role! To empower the community heritage sector and provide a validated voice for it at all levels.

- to coordinate training and skills development relating to Community Heritage

MRSB: Not sure what this implies? We don't think the network itself should be considering providing training courses as these are/can be provided by many other bodies. The network however could play a major role in raising awareness of existing opportunities and in influencing the type of support available.

- to coordinate training and skills development relating to Community Heritage

Minimum elements:

- Committee
- Website
- Mailing List
- Research and Advocacy Activities – relating in annual impact delivery summary
- Training Provision
- AGM

This model envisages a management committee (Chair, Secretary, Treasurer) of up to 8 people, who meet four times per year virtually and once per year with membership at AGM (potentially as session at Community Heritage Scotland Conference). It assumes management group and contributors of content is provided in-kind but additional capacity could be created by fundraising for project or task specific roles.

Costs:

Design of Website (potential for In-Kind)

Hosting of Website	Est £100
Print Costs – promotional materials	Est £150
Management Committee AGM Travel Costs*	Est £800
AGM (venue hire, refreshments)	Est £250
Training Fees	Est £2,500

Community Heritage Impact Report Est £2,500

Estimated Total £6,300

*where appropriate one night accommodation and subsistence costs for annual Steering Group meeting

Income: membership fee (e.g. c 150 people at £15 per year / c 30 organisations at £75 per year) £4,500, possibility of donations /fundraising £500 and possibility of small grant applications for issue specific training events £1,500.

Model 3: – CHS Active Delivery Network

Goal: to increase quantity and quality of Community Heritage activity in Scotland through supporting and enabling network members and by delivering strategic projects on their behalf.

Aims:

- identify all community heritage organizations and participants who contribute to community heritage Scotland.
- regular communication about issues and events relating to Community Heritage
- to collate evidence of and provide advocacy for benefits delivered through Community Heritage.
- to coordinate training and skills development relating to Community Heritage.
- to provide additional support for members.
- to identify and deliver strategic projects which increase quantity and quality of Community Heritage delivered in Scotland.

MRSG: Don't think we should be going down this route....

Minimum elements:

- Committee
- Website
- Mailing List
- Research and Advocacy Activities – relating in annual impact delivery summary
- Training Provision
- Membership Support Service
- Project Delivery
- AGM

This model envisages a management committee (Chair, Secretary, Treasurer, Communications, Fundraiser) of up to 10 people, who meet four times per year virtually and once per year with membership at AGM (potentially as session at Community Heritage Scotland Conference). It assumes management group and contributors of content is provided in-kind but additional capacity could be created by fundraising for project or task specific roles.

Costs:

Design of Website Est £2,500

Hosting of Website Est £100

Print Costs – promotional materials	Est £250
Management Committee AGM Travel Costs*	Est £1000
AGM (venue hire, refreshments)	Est £550
Training Fees	Est £3,000
Community Heritage Impact Report	Est £2,500
Membership support	Est £10,000
Project Delivery	Est £10,000

Estimated Total £29,900

*where appropriate one night accommodation and subsistence costs for annual Steering Group meeting.

Income: membership fee (e.g. c 100 people at £20 per year / c 40 organisations at £100 per year) £6,000, possibility of donations /fundraising £750 and need for grant applications for issue specific training events. Membership support and project delivery by fundraising specifically for project officer(s). Potential for social enterprise activity as one dimension of funding model.

MRSG: Notably none of the currently proposed models include any funding for someone to manage the network... Even the minimum model (Model 1) requires someone to keep the database and website updated and provide regular communications, while the more comprehensive model also requires someone to act as an advocate for community heritage (among other things). We don't think it is reasonable to expect anyone to do this on an in-kind basis. This would also raise the possibility of a conflict of interest that would compromise the ability of the individual to act as an independent advocate for the community heritage sector.

AS: Agree that these models are light on costs and resources required. I think there is merit in keeping our powder dry on the possible network scenarios until we have more understanding of needs.

Network Models considerations

There are a range of key issues which any potential Community Heritage Scotland network would need to consider and agree – and this will include looking at whether an existing network could be used or expanded to deliver the model. At this moment, there is no network which could cover all bases but in exploring options and models this will certainly be considered.

Scope and Scales of Activity

A potential **Community Heritage Scotland** network could connect interested organizations and individuals on a National basis in terms of communications and knowledge exchange.

Should there be further network activities, beyond connecting and communicating, they could be facilitated and supported on a variety of different geographical scales ranging from National, Regional, Local and indeed International. For example, there could be shared 'regional' focus on

different parts of Scotland, where opportunities and needs may vary, and as such network supported activities could be more targeted.

Depending on the range of agreed activities, there is potential for a network to support a regionally based delivery focus relating, for example, to: network 'member' support, skills and capacity building, fund raising, project delivery and impact.

A regional approach may allow closer connections between active members and the 'on-the-ground' issues they are facing. It may also contribute to a more resilient national network due to increased skills and capacity through wider participation.

Membership

As a proposed network there will be a need for some mechanism for organizations and people to register to participate.

A membership model may help distinguish who is actively involved in the network. Membership could be freely open to anybody who supports the aims of the network and wishes to participate in its activities. Another option could be for an annual membership fee payment.

The level of fee for organizational and individual membership would in part depend on the range and level of network activities and / or membership services which are planned.

MRSG: As noted above, not in favour of charging a membership fee.

Governance

Should a Community Heritage Scotland network be created, and depending on its scope of activities, there will be a need for some form of Governance model to be established. Even if the network is restricted to connecting and communicating agreeing a constitution would be wise. In most models a bank account would be needed and annual accounts prepared for the members.

Depending on its aims and scope, the group may need to be formally established as a legal entity. The ramifications of this would need to be considered by members through the establishment of a management committee.

In one model, with a focus on support and delivery on National and Regional levels, another approach could be a partnership of Community Heritage base organizations to coordinate the Network.

Sustainability

MRSG: It's very difficult to envisage how a useful network could be sustained without some form of core funding....

Establishing a community heritage network will take some level of initial investment for setup costs. This is likely at a minimum to include volunteer time as an in-kind contribution and a need for cash to pay external set up costs.

Ensuring effective and continued network activity will incur an ongoing series of costs which will require to be met on an annual basis.

The scope and scale of activities which a Community Heritage Network seeks to undertake will have ramifications for ongoing financial costs, and what is by and large not clear is the balance of grant and sustainable income.

A number of forms of funding exist which may include membership fees, donations and grant aid for activities.

Social enterprise should be a given for the sector, but there is a sense both from the survey and empirically that this is not always understood, or always supported by attention to planning for outcome and impact. Therefore, there continues to be an opportunity to explore a social enterprise component to the funding and impact model.

Beyond the financial issues of sustainability, there will be issues of vision and leadership for a Community Heritage Scotland network which will be key to sustaining interest and active support among members. The risk is that the network is (or is perceived to be) dominated by only one part of the community heritage sector. This is the issue that several existing networks with a national focus (but with their own specialist area, such as buildings, museums, archaeology etc) need to grapple with: do they stay with their core area or broaden out to encompass the whole sector? Do they actually want to be the lead organisation? Or should this more properly grow as a new organisation from within the community heritage sector itself? Either way, leadership and vision will be critical.

MRSB: In order to truly and independently represent the sector, the network should be set up and managed from within the sector itself, with representatives of all relevant statutory bodies included on a steering group.

A model which has a regional component to it may also help build capacity in the community heritage sector, potentially more effectively learning from successes and good practice in some regions and supporting growth in regions where community heritage is less well established.

MRSB: While we agree that some regional elements may be valuable, it may be difficult to specify what comprises a 'region' in terms of extent/location? Would need to be careful to not to create regionally exclusive 'silos'.

AS: It's important to think about the impact on existing organisations/fora and how best to add value. There's scope for a sea change but it should be inclusive. We would love to be able to do more in partnership with others and support groups better!

Community Heritage Scotland – Going Forward

Consultation Event

The informal consultation event *Community Heritage Scotland – Going Forward Event* was held on the 21st April at the Birnam Arts Centre, Dunkeld. It had been previously organised for March but was cancelled due to bad weather conditions. Due to a long waiting list and significant interest in the first event, the opportunity was taken with additional support from Historic Environment Scotland, to offer more spaces at a larger venue for the rescheduled event.

Ninety five tickets were booked (with another 10 released to waiting list not taken up) and 87 ticket holders attended on the day. A further 14 people from steering group and volunteer facilitators present, giving as total of 101 participants.

The event was run to provide information on the results of the survey and to allow issue around a potential Community Heritage network to be explored.

The structure of the day comprised:

9.30 – 10.30	<i>Networking Breakfast and Registration</i>
10.30 – 10.40	Welcome
Introduction to project Structure and goals of day	
10.40 – 11.40	Group Session 1
Community Heritage Network Issues	
11.40 – 11.50	Presentation on Initial Results of Survey
11.50 – 12.10	Discussions on Initial Survey Results
12.10 – 12.20	Report Back on Session 1
12.20 - 1.00	Discussions on report back from Session 1
1.00 – 1.40	<i>Lunch Break</i>
1.40 – 3.00	Group Session 2
Exploring Community Heritage Network Scenarios	
3.00 - 3.30	<i>Coffee Break</i>
3.30 – 4.15	Reporting back of session 2 and discussions
4.15 – 4.30	Summing Up & Next Steps

The key method to gather insights from attendees about the potential network was a work shop process.

The Workshop Process

Assuming that there was some interest / support among attendees for a network in principle, but further details needed to be explored about the nature of a potential network before any decisions are made by people and groups who may advance with its development. The workshop sessions allowed people to:

- 1) Discuss possible issues associated with a network at a broad level.
- 2) To explore possible scenarios of how a network could function, its scope of activities, etc

Ultimately the process will inform scope of further network development should it be supported.

Workshop 1

The first workshop allowed for initial exploration of network proposal in general terms. It gave people space for brief introductions before supporting discussion around four key issues:

- What is community heritage?
- What are the specific opportunities or benefits which a wider network could enable or support?
- What are the specific concerns or problems relating to a wider network?
- What other issues or comments should be considered?

Workshop 2

Having thought about underlying issues, attendees were then supported by the facilitator to work up a network scenario. We asked them to explore the scope of a potential network, so rather than suggesting pre-structured models, we wanted people to imagine, design, explore, and provoke us with ideas for what a network could look like. There is a huge amount of experience and expertise in the sector so we wanted to listen and learn, around four key questions:

GOAL: *what is the overall goal of your network?*

AIM: *what would be the aims of your network?*

e.g. widening participation, advocating for heritage, providing training for members?

NETWORK ELEMENTS: *what would you need to deliver your network aims?*

e.g. a committee? website? training? other activities? staff? how might it be resourced?

OTHER ISSUES: *what other issues might you need to consider?*

e.g. sustainability, governance etc

Workshop Scenario Responses

The 12 groups reported back on a shared scenario of what a Community Heritage Network could comprise.

Discussion ranged widely with key points emerging around:

- a) Achieving clarity and mission around the purpose of any network.
- b) Ensuring it is inclusive and relevant.
- c) Ensuring that it is sustainable – in terms of staying live and responsive, and financially.

The combined results are collated in **Appendix 1** (at the end of this document).

Section 3

Discussion going forward

There are two discussion forums within this project process which will feed into this report:

1. Community Heritage Scotland – Going Forward: public discussion day at Birnham Arts & Conference Centre 21st April.
2. Steering Group workshop: during May (tbc).

We are using information gleaned from during the project process, survey data, other feedback, and own experience to start exploring potential areas for discussion and possible further research.

The survey yields a great deal of information about aspirations of groups, activities and outputs, including giving a useful view of how they share (or aspire to) their heritage. This data adds considerably to understanding of the sector, but survey also paints a stark picture of the barriers and frustrations.

This project aspires to bring about positive change, and if it is to break through existing and recurrent themes then the debate should go beyond the detail and explore broad themes. The remainder of the document explores several thematic issues relating to Community Heritage which may be relevant to the potential vision and nature of a Community Heritage network in Scotland. How the sector responds to such issues has ramifications for what can be sustainably delivered in the future.

Is there enough genuine networking and partnership activity?

We have identified this as a potentially critical gap: from our experience in the broader community and development sectors we can surmise that heritage is perhaps 20 years behind in how it connects in; in the wider community sector funders began to demand active partnership and cross-discipline projects which fused into broad initiatives. After a minor struggle this was embraced, and is now routine.

Alex Hale identified going outside the heritage network as one of the three key findings in *Linking Communities*. Seven years have passed, and there is little to suggest that any material progress has been made. In 2011 he concluded his report thus:

Finally, the heritage sector needs to work with partners outwith the sector, to broaden the range of potential collaborators and ensure that community engagement not only embraces a small group of enthusiastic members but embeds the understanding and appreciation of the historic environment within the wider community. For example, improving and strengthening the links between heritage sector community engagement projects and the health and well-being agendas, which include a large proportion of community involvement.

HES: Many projects are beginning to go beyond the sector and we are seeing more and more. Northlight Heritage, Archaeology Scotland, SCAPE, Scotland's Urban Past, Venture Trust projects are just some good examples of this. Our funding priorities and Strategy as well as HLF also encourage this with the sector.

MGS: likewise – we have some great case studies of museums working in wider agendas and are currently working on social impact measurement – there is much to suggest progress has been made.

The survey does not readily support an assertion that there is a significant shift towards working across boundaries outside the heritage sector.

While some projects are reaching out, the majority are not, and the responses show that it remains a low priority for them. It is notable that the examples cited above by HES involve projects engaged or working in partnership with larger agencies, raising questions about how wholly independent projects are either able to achieve this or indeed want to.

This is not to suggest that community heritage fails at local level – it clearly doesn't, and it does create connections with different local groups and address local needs. But overall this perhaps raises questions about how partnership working is effected throughout different external or related sectors such as health. The survey showed no real evidence of working in partnership with the National Health Service or the Department of Work and Pensions – can this easily be achieved at local level or does it need a more formal framework which the heritage sector as a whole can tap into?

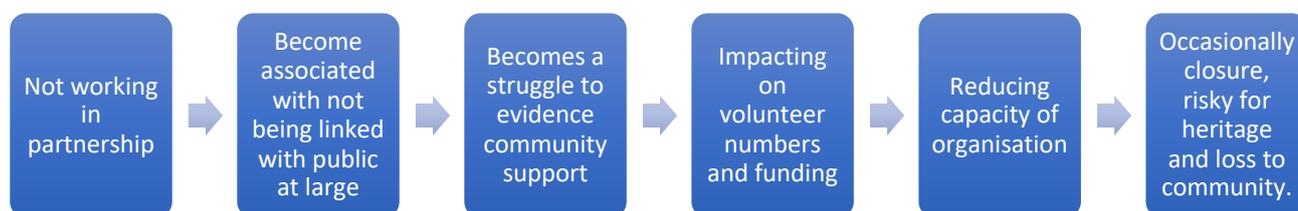
The Heritage Lottery Fund is in the process of a major review, and there are inklings that it is moving more towards place-making which demands a broad spectrum. It is possible that wide vision will be demanded – for example not simply referencing 'health and wellbeing' as an outcome, but actively partnering with health organisations at the early stages of project planning.

If it follows the Big Lottery's example, more emphasis on strategic planning may also be involved. Community engagement is already a central driver.

There is also the question of how much community heritage organisations actively work in partnership together. Organisations such as Museums Galleries Scotland actively encourage this to take place, but an observation from the survey data was that it is not happening to any great extent at local level. There are some local heritage forums, but the list of local heritage organisations under 'networks' was surprisingly low.

All round this shows that community heritage is not as active in working with other socially-facing organisations and initiatives outside heritage, and also not working widely with their peers in neighbouring or local museums. If there is a perception among community heritage organisations that the strategic heritage organisations do not work efficiently in tandem, then it is also interesting to note that there may also be insularity closer to home.

In terms of funding and how the wider community development sector is going, there is a sense that if heritage organisations do not look outside their own sphere they will lose out – and ultimately place the heritage at risk. It is a threat, but also an opportunity: unlike the large organisations, community heritage can be fast moving and flexible; it can effect swift change and try things out.



Are networks really networks?

The list of networks in the survey shows a mixed bag: some groups network almost exclusively with national organisations, while others (particularly individuals) list local clubs, groups, networks and sometimes just a business. Social media features fairly prominently as a network. Connections are largely with heritage-based organisations – but interestingly museums rarely seem to network with neighbouring museums.

AS: One aspect not really touched upon is competition – small museums vying for visitor for example; archaeological units bidding against each other for community-based work etc. These factors influence networks or the lack of them.

Often the networking appears to be predominantly contact lists or loosely affiliated ‘belonging’, rather than engaged activity or partnership. Or it can be just a talking shop rather than an effective tool. Where the networking is upward to large organisations there is a risk of non-reciprocal networking; receipt of information outflow but no real conversation. By and large the networking is inward-looking within the heritage sector.

By way of contrast, the most successful community-based generalist organisations (ie covering a range of general community activities) demonstrated a pattern of networking avidly across sectors and boundaries leading to finding free resources and useful people with skills and connections. This could form a useful area of further enquiry: identifying relevant examples and best practice in the wider community sector.

A key discovery of this project has been the vast quantity of networks which can be classed as heritage in Scotland (and further afield). With the survey only closing a week before this report, work is ongoing to identify, classify and explore the networks. The list is by no means exhaustive yet, and it is important to select the correct case studies if they are to prove useful.

How a new network might be structured and what it would aim to do are core questions going forward. With such a blizzard of networks already, it is vital that clarity of purpose and structure are clear and effective.

Is the current system a responsible way to manage heritage?

This is based on the *assumption* (none of the community heritage stats are measured vis-à-vis the other organisations) that community heritage accounts for a substantial part of the national sector, possibly delivering the majority of heritage projects outside the central belt and contributing the largest volume of unpaid time into the heritage sector as a whole.

Key factors in considering this:

- Unlike general community activity which is ‘here and now’, or creative industries which are creating new work (much of it temporal), the heritage sector has a continuing duty of care for a large body of physical historic things. The duty is no different for a national or local museum, for NTS and HES or the local occupiers of a historic building.
- Despite the fact that all the heritage sectors are charged with the same duty, community heritage is the only distinct sector which has no core funding mechanism. note: NTS has its different established framework).
- The former Scottish Museums Council audit (2000) described all museums as a dispersed national collection with the clear mantra that local was not lesser. Communities are therefore also managing part of the national collection.
- Unlike within the core-funded sector or the lead bodies, there is no framework. There is no statutory requirement to care for heritage by local authorities in terms of museums, collections and archives, or physically managing other types of heritage. Their responsibility is limited to protection of built and natural assets via designation and planning consents, with any other actions discretionary. Given the devolved framework of government this impacts on community heritage which operates at local level. It varies greatly in support, commitment and funding across the country from excellent to zero.
- Where there is no sympathetic local authority or framework, there is no agency, and no discernible route for it.
- Local heritage forums are variable in quality, and typically struggle where there is a void at statutory level.
- Lack of structure becomes a glass ceiling with several impacts: talented leaders in local heritage organisations cannot contribute to regional strength; networking can be poor; good projects struggle to spread the word; and there is generally a tendency to silo around places and organisations.

These factors speak of huge structural problems within the community heritage sector.

Therefore taken all round, and based on survey outcomes, is the community heritage sector being responsibly managed on its own and as part of the wider sector? Is there a desire for self-regulation? If so, what implications does this have on standards, the management / preservation of heritage and ethics?

If the conclusion is that the community heritage sector is not being responsibly managed, what would be a practical way forward? Further research is almost certainly required, taking a holistic look at the sector backed up by case studies which address issues such as:

- Auditing the heritage in care.
- Importance versus significance.

- Enabling advocacy and achieving effective agency.
- Proposing new structural models.

Is there enough recognition of what community heritage can do?

Or perhaps: is there enough *knowledge, understanding and respect* around what community heritage can offer, within the organisations themselves, in the wider heritage sector, and in public/statutory consciousness?

AS: Yes, there is within the sector, but this is not effectively translated to government at the moment. Need for advocacy and evidence.

MGS – also agree yes. Looking at socio-economic impact at the moment and regular case studies and data supplied to Scottish Government.

Currently (if not universally):

- Gift: millions of volunteer hours saving vast sums of money and saving / protecting buildings, sites, artefacts etc that would otherwise have been lost.
- Quality: volunteer skills / respect / parity of esteem.
- Offer: activities grown by and embedded in communities rather than ‘engagement’.
- Impact: health and wellbeing, social cohesion, social responsibility, providing community focus, learning, combatting loneliness, providing opportunities etc.
- Duty of care and conservation: caring for the national dispersed collection, preserving important buildings and monuments, researching history.

AS: Need for sustainable groups and legacy planning within community groups – who will continue their work and projects?

We need to unlock these valuable opportunities for members of our wider society to develop new skills

(linking to SG drive to re-invigorate volunteering –

<http://www.gov.scot/Publications/2017/09/8468/10>

<https://news.gov.scot/news/volunteering-in-the-year-of-young-people>

HES: Historic Environment Scotland recognise and respect community heritage and the role of volunteers. Our Scottish Historic Environment Audit (SHEA) highlights that ‘the historic environment...benefits from at least 17,100 volunteers’. While a piece of work commissioned on Volunteering in the Historic Environment - www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=9f05922b-0aa8-46dd-be3a-a61700dc8ed5 surveyed both community groups and wider organisations on their views on volunteering. It provides a rich source of evidence on the benefits volunteering can bring through case studies. This was commissioned by the Volunteering Group for Our Place in Time (OPiT), led by Volunteer Scotland, who are focussing on demonstrating and promoting the value of volunteering to the sector and establishing mechanisms for individuals, communities and organisations to engage with the historic environment. Through Archaeology Programme funding we also actively prioritise projects where activities are grown by/developed by the communities themselves. Our Place in Time is also looking to establish a Skills and Expertise Working Group to work with groups from public, private **and voluntary sector** to develop initiatives and address needs.

These impacts have not been quantified either of themselves or in comparison with larger organisations – it has not been a focus and is also hard to measure. In recognition across the whole sector, the Museums Association developed the initiative [Museums Change Lives](#). In partnership with the Esmée Fairbairn Collection Fund has just launched [Measuring socially engaged practice: a toolkit for museums](#); however this tool is overly focussed on collections and is of no real use to the community heritage sector with its wider focus. There remains a void when it comes to applying tools to the measurement of social impact from heritage.

HES: The need to measure impact of projects (including social impact) has been noted in the Archaeology Strategy and is in the Delivery Plan to review and improve where possible.

USTAN: Measuring the more intangible aspects of impact is a challenge that it would be interesting to explore through a follow-on project.

Community enterprise has successfully crossed this Rubicon and understands its offer. Community heritage rarely defines itself as ‘enterprise’ but is in fact social/cultural enterprise. Is this another deficit from ineffective networking and connecting in; perceptions (self/wider) being blocked by narrow focus on the heritage and the ‘patch’ itself rather than celebrating the very real contribution that grows from it?

But who has the time or energy to do this within the organisations, and is the measurement really their responsibility? Or it is a reflection of disparity of esteem, recognition and support from the wider sector? Has it become a self-limiting cycle?

A similar self-limiting cycle could perhaps apply to what seems to be a lack of awareness of wider social issues and needs; whether from simply not seeing it, or denial, or just ‘nothing to do with us’? This carries inherent dangers: the smaller and remote the community, the more critical is the need to work together to address the issues for people in the community (e.g. poverty, loneliness, lack of access to services). Yet it appears that some heritage organisations seem to sail on regardless of this.



Does the current funding system work?

This project has the opportunity to inject an extremely valuable perspective into three current reviews: National Cultural Strategy, Heritage Lottery Fund, Scotland’s Archaeology Strategy, and the National Strategy for Scotland’s Museums and must be a key topic for debate.

This topic will draw together all aspects of this paper - not least the issue of heritage as a service industry with a duty of care, a fact underlined having by a core state funding system (common to all of Europe and many countries worldwide) which is clear acknowledgement that heritage cannot be cared for without direct support. What place does heritage managed by communities hold? Why does it apparently lie outside this logic? Is it that the system of support has simply not caught up with the expansion and state of community heritage – or perhaps it, and its grant funding partners, are not flexible enough to be effective in communities?

HES: All funding models have pros and cons. A counter balancing argument might be that there are reasons for a model based on injection/project funding. It can reach more groups and more geographical coverage than long term management funding model (which has been used in the past in monument management). It also allows new groups with fresh ideas to be able to evolve, which can increase new audiences as well as reduce the risk of a closed community. To try to combat the issue of long term management, injection/project funding has tried to make sure sustainability has been modelled in to project outcomes so that other ways of funding can be leveraged to allow added value/benefits in the wider historic environment sector.

Do the requirements by funders distort the community heritage sector?

Against the backdrop of the tailored review of the Heritage Lottery Fund, it is a good time to consider the synergy and effect of a highly-structured funding application process with reference to the community heritage sector. It is solely the province of HLF, but it returns to questions of perspective.

The broad national agenda, crossing all disciplines within heritage, is about engaging with communities, but what if your organisation IS the community and all activities grow from WITHIN the community? It becomes a circular argument of engaging with self; hard to evidence in terms of additional people reached/new activities delivered/additionality evidenced.

A key focus from sector leads and funders is on engaging with people as audience/participants in activities and outputs – but does this miss the essential point that community heritage is as much about the internal activities as what it pushes outwards? In a small community, the biggest offer can be about creating the active ‘family’; volunteering, learning new skills through training, sharing a goal and a mission, working together – whether restoring a historic boat, helping in the tearoom, cataloguing collections, running an event.

HES: Although engaging with people and bringing in new audiences is part of our national agenda, building up skills and training in communities is as well. At HES through the Archaeology Programme we don't prioritise one over the other. We want to try and consider community engagement in a more holistic sense. The sector's aim through Scotland's Archaeology Strategy is 'to develop and promote the supply of training and learning resources and opportunities at all levels to equip current and future generations'.

The funding pattern demands a listed activity programme and means of sharing heritage outwards – forcing community organisations to create burdensome programmes aside from what they already deliver as optimum community sharing activities. Sometimes it is surely not all about sharing outwards, but also about attracting people to come and join in the process of enjoying heritage through normal every day activity?

The result of enforced funding structures can potentially lead to:

- organisations trying too hard;
- identikit activity programmes, many of which don't get properly delivered because they are rote solutions to bespoke situations;
- additional stress on already overstretched committees to deliver more;
- big museum/organisation solutions to small-scale local situations

Is it time to open a dialogue with funders about recognising intrinsic worth of community heritage as a shared activity, and accepting empirical (or alternative) evidence of worth?

HES: For most funding it is necessary to know what it is to be spent on as there is a duty of care in spending public funds. For Archaeology Programme funding this does not mean that activities have to be new outward facing programmes but there does need to be seen to be a value/benefit. This could be training, recording a site at threat of loss, enhancing our understanding of the past, using the research to help others manage the site or engaging the wider community.

Is the whole heritage sector too inward looking?

An observation from *Are networks really networks* above is that they appear to be inward-looking, an important point which speaks of “comfort zones” and resisting change or challenge to what we know.

Pulling together observations and survey data, key markers appear:

- working in silos
- patchy or ineffective networking
- not connected in/out with wider community initiatives
- reluctance to look outside heritage (happy inside it)
- lagging behind broader partnership initiatives in the community
- happy to talk amongst ourselves
- conservative in engagement methods
- happy to follow well-worn routes

It would be no surprise to conclude that the community heritage sector is generally not inclined to push boundaries. It is probably in the psyche to some extent, and also perhaps generational especially in the community sector which is dominated by volunteers participating in their retirement. There are fewer jobs overall (especially at the creative and curatorial end), and limited turnaround, causing a deficit in young people entering or working in the sector.

If a debate concluded that the sector was inward looking, then this should fuel aspirations for any potential community heritage network, and also for setting down benchmarks for trying to be better at working across boundaries as a sector.

In conclusion

The complexity of the community heritage sector on its own, and in relation to the wider heritage sector, is challenging to say the least. It is also, in the view of the authors, the most vibrant and exciting platform for heritage in Scotland with truly extraordinary energy and outputs which belie the struggles underneath. Self-driven community groups and individuals have a unique freedom to think and create, to take projects in any direction and work with whoever they like, to be light on their feet and try to make their own luck.

There is huge untapped potential in the sector to do more, not only in the roll out of activities but by contributing directly into the web of social structure of which all communities, urban or rural, are made – and nowhere more so than in smaller and remote places.

This discussion paper has found significant disconnects, among them:

- **Between the demands of heritage management nationally and the position of community heritage managers:**
 - o Community heritage manages an increasingly large part of Scotland's heritage which lead organisations and core-funded museums would be hard-pressed to pick up if it fails. An interesting parallel is with carers; forgotten for decades, and now being progressively moved to centre stage because without them the whole system of social care would collapse overnight.

- **Between top down organisations and the communities managing their heritage:**
 - o The depth of the offer arising from how communities choose to put their heritage to work, and how sector leads choose to deliver help, encouragement, support and recognition.

- **Between community heritage organisations and the communities around them:**
 - o There is clear evidence in the data of wanting to engage with local communities and develop audiences, however this is different from actively pursuing community interest: none of the respondents said they wish to identify community priorities and work with heritage to achieve these priorities. This may explain why some organisations struggle with relevance in their communities.

- **Between the service aspect of community heritage and the need to be self-sustaining:**
 - o The independently managed sector has none of the certainties of the statutory sector, which has a specific job to do and receives core funding to do it. However, the river that runs throughout is the problem of duty of care and the need (and desire) to connect heritage with people; both of which skew the whole sector towards a service industry and make it almost impossible to run as a commercial business on its own.

For all the disconnects, there are commonalities of purpose across the whole heritage industry, and these should be laid as bedrock under future discussions about community heritage, while also celebrating the differences.

The answer is unlikely to lie in homogenising the heritage sector, which would almost certainly not be welcomed by the community organisations themselves. It is almost certainly also not a matter of tweaking current systems but rather proposing radical new approaches to tackle the combined problems of increasing responsibility versus dwindling resources of money, time and people.

This project aims to stimulate change in the community heritage sector; this early phase is about exploring where it is now and opening up discussion about where it might go in future. As expected, the process so far has produced a set of questions rather than answers, and the conversation should be for the whole sector.

Appendix 1: Community Heritage Scotland – Going Forward: collated response

GOAL: what is the overall goal of your network?

Group 1. The Mission Statement: To encourage a vibrant and sustainable heritage sector in Scotland (throughout).

Group 2. Raised awareness within and of the community heritage sector.

Group 3. A cooperative body representing and advocating on CH institutes on behalf of stakeholders/members at a strategic level.

Group 4. To facilitate all the groups/Sdcs/Museums. Mission statement: To encourage a vibrant, sustainable heritage sector throughout Scotland.

Group 5. To create an information hub for the preservation and empowerment and sharing of community heritage.

Group 6. To become a vehicle for mutually advantageous communication, knowledge exchange and skills.

Group 7. To act as a community hub for community heritage groups in Scotland. Second stage-providing resources and support.

Group 8. Advocating positively for heritage - for effective working of the groups. Promoting heritage to a wider audience - everybody!

Group 9. To facilitate communication, sharing, understanding, between people and groups concerned with community heritage.

Group 10. Organisations in a better place through creating light connections through a range of interest groups to provide opportunity for further offline networking.

- Celebrate Scottish Heritage and promote it, and engagement with it.

- A route for providing voices at a national level.

- A route for consultation by national bodies/agendas.

- Legacy building.

Group 11. Keep community heritage alive and future proofed.

Group 12. Passionately, to present the past to the future

AIM: what would be the aims of your network?

For example widening participation, advocating for heritage, providing training for members?

Group 1.

- To facilitate awareness.

- Signposting - sites to go for e.g. data protection, legalities, responsibility. Go here for this-that. Updating grants funding.
- Facilitation - professionals putting on info to local volunteer groups. Facilitating access to the services of MGS, AIM.
- Optimise what we've got.
- Communication between groups.

Group 2.

- Aim to share knowledge: case studies campaign. Talent bank/skills share.
- To develop partnerships.
- To campaign/advocate on behalf of members.

Group 3.

- Promoting C.H and supporting members (e.g. training, fundraising).
- Inclusive/widely accessible (geography no barrier!).
- Ensuring C.H interests are properly taken into account in public policy i.e. in balance with other demands.
- Co-ordinate C.H interests; avoid duplication.

Group 4.

- Communication between groups.
- Sign posting of community heritage info e.g. update of grants funding -data protection/technical.
- Sharing best practice.

Group 5.

- To provide a national network of communication and mutual support.
- To provide information on funding sources and application advice to encourage personal development for individual groups.

Group 6.

- Build relationships between different sectors.
- To offer advice and practical support in funding, training, and governance.
- Promoting projects.
- How to deliver REAL change to funding process.

Group 7.

- Initially: Linking like-minded community organisation.
- Developing after: Establishing and unifying, facilitate connections, training and toolkits, marketing.

Group 8.

- Sharing info - how and where to find it.
- Providing advice - funding, technical knowledge, best practice.
- Links to finding info e.g. web links, speakers, consultant experts (recruiting volunteers).
- Promotion of events.

- Access to group archives, web links, resources link list.

Group 9.

- Sharing expertise, info and peer support.
- Making community heritage easier.
- Supporting, nurturing and improving what we do and how we do it.
- Promoting the importance of community heritage.
- Widening participation: not being an echo chamber.
- Sharing training and materials.

Group 10.

- Sharing skills/expertise/ successful solutions to problems. Contact professional advisors. Pairing up groups/speed dating. Providing peer learning. Create visibility for organisations.
- Place to ask questions about projects (citizen science). Place to promote projects.
- Allow two-way communication.

Group 11.

- Learning - educate groups, lift their ability and confidence.
- Link to wider participants (like the Shetland model).

Group 12.

- Provide support, encourage and share experience.
- Increase diversity and inclusion in community heritage - range of organisations and activities in this sector.
- Support and motivate volunteers.
- Provide advice.
- Lobby on behalf of community heritage.
- Become a public face for community heritage.

NETWORK ELEMENTS: what would you need to deliver your network aims?

Group 1.

- Website design.
- Management group.
- professionally maintained website
- paid staff run network (install calendar of groups events - refresh)
- membership fee?

Group 2.

- Steering group: Light touch-co-ordination. HES role? Revolving chair? Freelancer? One of members.
- Website/publicity.
- Annual meeting.
- Membership fee? Initially free. Happy scale.

Group 3

- Council community heritage main group.
- Off branches of paid regional officers and paid secretariat posts.
- Unpaid interest groups, projects, professional bodies, SLHF.

Group 4

- Foundation for Sustainable Development funding.
- Led by management group.
- Paid staff to run network, install calendar of group events.
- Professionally maintained website-with group info on it - updated and refreshed.
- Membership fee?

Group 5.

- High level of full time staff resource.
- Government funding.
- Full time members identify funding sources for network.
- Identify and signpost suitable professional advisor on feasibility, stability, funding applications etc.
- Identify training needs.
- Requires a meeting such as this to elect representatives for a steering committee.
- Individual member this would affect income streak.
- Third sector constitution, board - on a national base.

Group 6.

- The more you put in the more you get out.
- Mechanism for contributing, for potential benefit.
- High level information distributed.
- Case officers.
- Facility of refining objectives of project/criteria of your project.

Group 7.

- Co-ordinator - paid. Accountable.
- Website/Facebook page.
- Co-ordinating committee - Chair and committee members, fixed term, some continuity.
- 'Umbrella' National organisation, regional networks.

Group 8.

- Depends on size of network.
- May need a fully constituted body with a paid administrator/coordinator which would need funding!
- A smaller committee to manage a bulletin board/email approach.
- Maybe quarterly newsletter to begin with.
- Small vs Big! Pros and cons of both discussed.

Group 9.

- Digital portal and archive: Mapping who is doing what where, using channels YouTube, vimeo, sketch fab.
- Conference/regional meet ups - mindful of weather and venues, meet regionally around other events.
- Events/activities diary.
- Board representative of community heritage and is responsible and accountable to the network.
- Operational - blend of staff and volunteer - sustaining interest and engagement.
- Centralised funding, but independently managed - by the board and not another organisation.

Group 10.

- Listings/contacts - to allow offline informal networking/peer learning:
 - o Private forums
 - o Heritage Wiki
 - o Open forum?
- Promote activities/learning opportunities online. Online forum to ask research questions.
- Alerts/notifications on national agenda consultations.

Group 11.

- 'Bring and Buy' - Emulate what goes on in local communities. Know who can fix stuff, electrics, drive a minibus. All groups of people bring something to make available to others for free.
- Events - build your own event through selecting sessions.
- Clever digital platform - editable - interactive - Wikipedia – blogs.

Group 12.

- ACTIVITIES
 - o National get together (annual?).
 - o Mentoring/buddying scheme between organisations.
 - o Volunteer swap shop for inspiration and experience.
 - o Digital resources. Website. virtual forum?
- ORGANIZATION - Controlled by the communities.
 - o Membership scheme. Financial contribution varying according to means.
 - o Open to individuals and institutions.
 - o Clear statement of benefits.
- GOVERNANCE SYSTEM - Charitable organisation. Potentially with own board of trustees.
 - o This organisation will employ regional reps to support local groups. But no large centralized base.

OTHER ISSUES: what other issues might you need to consider?

Group 1.

- Sustainability: continuous funding from Scottish parliament. Refreshing/up to date.

Group 2.

- No comment.

Group 3.

- Scottish Local History Forum (National Library of Scotland).

Group 4.

- Sustainability - requires continuous funding from Scottish parliament.
- Forget about a network - someone to establish a heritage network/chatroom!

Group 5.

- Governing body should be 'national' not local but should be designed to support and work with existing local organisations.
- Over-arching group would never be responsible for running local projects.

Group 6.

- Available to all. Risks of that to quantify.
- Who will be responsible?
- Should be able to express point of view.

Group 7. Funding.

- Lead body/organisation

Group 8.

- When people leave positions.
- Broken web links.

Group 9.

- Moderator role - monitoring, accuracy and appropriateness.
- Prototyping models and collaborative working and sharing learning from these.

Group 10.

- Inundation-need rules for network.
- Keeping up to date/admin.
- Doesn't grow arms and legs - be organic, stay grass roots, informal.

Group 11.

- Possibly semi-permanent (and stop if not achieving performance metrics).
- Avoid people labels e.g. staff (everyone).
- Graft it on to an existing organisation or network.
- Avoid setting something up that requires constant grant chasing.

Group 12.

- As little as possible spent on the organisation.
- Set up a body which will be sustainable into the future.

Event Feedback

Feedback forms were in attendee's welcome pack and completed forms collected at end of the day. There were 62 forms returned. A rapid analysis has shown:

Attendees:

35 - Female

25 - Male

2 - declined to fill in gender

Average age: 60

Median age: 62

Rated Event:

23 Excellent

29 Very Good

39 Good

1 - Fair

Key Improvements:

- Quite a few said too much repetition.
- Wanted survey results before the event.
- Some had problems with the acoustics and couldn't hear.

Appendix 2 : Standout facts: from steering committee members and project team

Members of the steering group were asked to identify elements from both the discussion document and the survey, as a way of pulling key markers out of the wealth of information and discussion and identifying what particularly resonated with their situation.

From discussion document

<p>Robin Patel. Ergadia team member</p>	<p>1.) Lack of cross-sector networks / forums, despite clear trend to focus on broader issues e.g. health and economy.</p> <p>2.) Funders distorting need and not reflective of objectives of organisations. i.e. top-down and piecemeal.</p> <p>3.) Lack of recognition of impact and significance of community heritage at a national level.</p>
<p>Robert Hay Community representative: Isle of Lismore Heritage Museum</p>	<ul style="list-style-type: none"> • First of all, the extensive critique of the heritage sector is very valuable in itself. Moran taing, as we say over here. However, the final document for the "outside world" will need to be more concise. • I appreciate the emphasis on the voluntary care of heritage that would otherwise be lost. That is very much our activity on Lismore. In our public relations as a small accredited museum, we emphasise the fact that our collections are a component of the national treasure. • I was disappointed to learn of the silo culture amongst statutory bodies. Our experience of interaction with the statutory bodies is that successful interaction requires the development of personal relationships (i.e. the development of networks). • On the other hand, where local networks/fora exist, the widely contrasting nature of different members can make meaningful joint activity difficult. This is our experience with the Argyll & Bute Museums Forum. • I am agnostic about further analysis of the survey data. With such open-ended questions, activity of this kind can seem like chasing your tail. The existing findings look firm and helpful. • As a final point, as I was pondering about the range of bodies considered, I realised that there are other powerful/influential players at work - for example the Church of Scotland Trustees, who own (maintain?) more buildings of heritage value than any other organisation in Scotland. • As for the way forward, I would favour Option 1, in the hope that something more robust would grow out of it.
<p>Susan Kruse Community representative: ARCH</p>	<p>Report:</p> <p>1) One of the aims (and I think a very useful and valid one) is to find out who is doing what/where. However, there are still many more groups and people to reach. (I have a list of organisations and museums in the Highlands, and have supplied this to Catherine & Robin, so that the capture/missing rate can be calculated. This could then be applied to other areas to give an estimate of under-reporting). I think this is important to try and get more on board - and for all conclusions drawn from the report to note that there are still more</p>

	<p>voices and opinions to capture. I think that roadshows are important - bring the events locally/regionally.</p> <p>2) The network models are useful. BUT, I think we need to think carefully about including membership fees as part of the equation. This will certainly cause many smaller organisations to drop out/not participate - and we will then lose valuable input and insights.</p> <p>3) I think that regional-based options (p. 25) are very important, and have real value as a way forward, helping to support local groups, but also still can be seen as grass-roots.</p> <p>4) It is important to highlight the need to quantify what community heritage can do /contribute (p. 39), even if we can't do it yet. But this information is surely going to be necessary if the organisations are going to be supported and valued.</p> <p>5) Given the silo mentality of statutory and support groups, how will a community heritage network fit in / be effective?</p> <p>Other thoughts:</p> <p>1) Simply increasing funding is not an answer either. I know of too many organisations who have struggled with simply monitoring and rolling out the 'simplest' HLF programme. They rely on volunteers, struggle with the jargon, find the applications AND the monitoring difficult, and even logistics such as finding two signatories for payment can be a problem. Some have vowed never to do this again. Only a very small fraction of community groups can cope with LEADER applications!</p> <p>2) What sets this exercise apart from others is that it genuinely feels like it is trying to get the grassroots perspective and be bottom-up. As such it is very valuable. This is stating the obvious, but sometimes that's good.</p> <p>3) This is only the start of the process, and I for one would love to see Ergadia get more funding to continue.</p>
<p>Sue Furness, Fiona Jackson Community Representative: Morlaggan Rural Settlement Group</p>	<p>1. Model scenarios: None of the models currently include core funding for someone to manage the proposed Community Heritage Network. This is obviously a contentious issue, as current funds are limited and competition for them is fierce! Even the minimum model requires someone to keep the database and website updated and provide regular communications, while the more comprehensive model also requires someone to act as an advocate for community heritage (among other things). We don't think it is reasonable to expect anyone to do any of this effectively on an in-kind basis, in addition to whatever other tasks their job already requires them to do. Utilising time from someone already employed by the sector also means that they may experience conflicts of interest between their employer's aims and priorities and those of the community heritage sector, which would prevent them from acting as an independent advocate.</p> <p>2. What do we want to provide?: We don't think the network itself should be considering providing training courses etc. This is a hugely onerous task and risks duplicating existing provision. The network could act as a hub for people to advertise existing courses and could make other providers aware of the demand for specific courses, but doesn't need to go down the route of providing training itself.</p> <p>3. Membership: We would be against the idea of charging a membership</p>

	<p>fee if at all avoidable. This may not only be a financial barrier to some groups/individuals but is also associated with a lot of additional administration.... What do you do if people don't pay? (chase them/delete them from contacts etc?). It then automatically becomes an exclusive group...</p>
<p>Anne Tunnicliffe Ergadia team member</p>	<ul style="list-style-type: none"> - In the survey, the respondents' achievements look like things that the national organisations / funders would not go for ... because - Yes, the main "beneficiaries" are probably the people already involved in the heritage group. Example being the 40 MOTL volunteers in the floating men's shed. Yet the national organisations / funders always seem to want to fund "extra" beneficiaries. Inreach not outreach is needed Also look at Bannockburn House ... there is nearly half a million of revenue funding just sitting there but the volunteers are just doing stuff they want to do and probably are not aware the funding is sitting there ... all the revenue funders (BL, HLF, Leader, AHF etc) should just have signed up to put cash in a big pot and then there should have been a Robin-led process to ask the volunteers how they wanted to allocate it - Yes, agree on the "importance" of "importance". What the local groups think is "important" does not seem to be of interest to national organisations and funders (we suspect the national organisations and funders have no idea what they are missing nor any idea about what could be lost). As you suggest, maybe there needs to be a new way of assessing "importance". And "importance" is (I think) going to change over time more and more quickly. Will we see the first "A" listed 70s disco somewhere soon? Can you imagine the upsurge of interest in preserving petrol / diesel cars (like we have now) as we head towards driverless electric pods? - Why not have "heritage on prescription" so that people who get involved in community heritage each get a £500 voucher to fund the heritage group they join. That would recognise the fact that it is the people getting involved in the group who get the benefit - The attendees at the recent event clearly "recognised" like-minded people and seemed to enjoy their networking very much and want to do more. Perhaps they don't feel they have much in common with the arty people or the social care people in their communities, which is perhaps why they don't get "reached" by other networks / infrastructure - Average age at event 60! Perhaps it isn't possible to involve young people until they hit their 50s / 60s (look at me if you want an example!) Perhaps the age profile is something to celebrate (active ageing etc) with possible links to make with U3A etc - The outputs so far MUST be brought together somehow and then be a freely available report on "the sector we didn't know existed". Incidentally, this might still be in time to influence HLF who have yet to produce a UK business plan for new financial year 2018/9 - I think we ought to think outside the box in terms of some sort of online networking platform so people can link up and share stuff (how about a cross between Mumsnet and Gumtree as a model).
<p>Dr Karen Brown, Museums,</p>	<p>The long discussion document is extremely rich and valuable for all parties concerned and interested in this initiative. The evidence solicited provides an</p>

<p>Galleries and Collections Institute, University of St Andrews.</p>	<p>excellent provocation. However, it has only got so far in relation to geographical reach and research analysis. For me, three stand out points are in relation to a new Stage 2 project:</p> <ul style="list-style-type: none"> - To obtain funding for a further 1-2 years, so that the “roadshow” can take place Scotland-wide in more remote areas, and evaluate the best approach moving forwards at regional and national levels - To define the Steering Committee going forward, ensuring a balance between community representation and elected members from “sector leads” who are essential for such an initiative and surrounding discussions, as evidenced in this document. - To allow adequate time within Stage 2 for in-depth and accurate analysis of results, reporting and recommendations.
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From survey

<p>Robin Patel. Ergadia team member</p>	<p>1.) Cycle of survival :- succession problem ---> community engagement --> establishing relevance --> getting people involved</p> <p>2.) "not sure" responses to CHS network. Are accredited museums already engaged? Do they the navigational tools, skills and resources in place for survival?</p> <p>3.) Acquisition of property - rising trend of community heritage wanting to acquire property, often within places attracting strong communal affection.</p>
<p>Susan Kruse Community representative: ARCH</p>	<p>1) It comes out loud and clear that funding is by far the biggest challenge, with succession planning next. Implications: if this is not addressed, our organisations are going to be in real crisis. And as stated at the last meeting, it is not enough to just have more Resourcing Scotland's Workshops - I thought these did not really address the issues of smaller organisations, and moreover only mean more applications (needing expertise and time) as well as skills on monitoring afterwards.</p> <p>2) A large number of people are not sure if a community heritage network is a good idea. Implications: we need to drill down to see what specifically this network could do, and how it meets identified needs.</p> <p>3) The response rate to the survey was incredibly good, given 'survey fatigue' which I often encounter. Implications: this means people are engaged and I believe gives us the mandate to request continuation of the project.</p> <p>4) What stopped over half of the people completing the survey? Is this normal? Could anything be done to try and capture why, and if so get their opinions (eg: did the survey not ask questions they thought were pertinent? was it too long?)</p>

<p>Sue Furness, Fiona Jackson Community Representative: Morlaggan Rural Settlement Group</p>	<p>1. Age demographics: Certainly not surprising, but definitely concerning. Do we just accept that the community-heritage sector is always realistically going to be largely synonymous with retired and/or middle-class, and therefore play to the strengths of that sector (because it is a perfectly worthy sector to consider!), or do we need a major refocusing/rebranding to widen participation??</p> <p>2. Funding: No good denying that most groups find accessing funding something that stifles their ambitions. Suggest that it isn't that funding doesn't exist, but that it's far too hard/time-consuming for volunteers to access it. From personal experience, smallish amounts are relatively easy to get (not surprisingly), but for larger amounts that may need matched funding, the lack of coordination among different funding streams makes the process prohibitively complicated.</p> <p>3. People want opportunities to share ideas/problems: Aside from any advantages of a virtual network, people would really appreciate the opportunity to get together to talk and bounce ideas off each other. This kind of fits in with the Community Heritage Conference, but maybe that's become too presentation-focused at the expense of more networking opportunities??</p>
<p>Dr Karen Brown, University of St Andrews</p>	<p>1. The online survey response rate is exceptionally high and the team are to be congratulated on soliciting such an invested response. It shows how well designed the survey was (concise, not too onerous, and with interesting and relevant questions). A second survey could be considered in Phase 2.</p> <p>2. The survey has shown the diversity of initiatives around Scotland, and that groups have a lot to learn from each other. Everyone shares common issues, such as access to resources, but also distinctive successes shine through, such as when communally-owned assets work well.</p> <p>3. Some form of forum / networking would be welcomed to help overcome barriers facing community heritage groups, but more Scotland-wide consultation on the ground is needed in Phase 2 to define the most effective model to meet needs in remote areas especially.</p>