

Seminar summary

Over fifty delegates attended this seminar, held at Llandrindod Wells under the aegis of the Civic Trust for Wales, and with the support of Cadw, the historic environment service of the Welsh Assembly Government.

In the opening session, *Matthew Griffiths*, Director of the Civic Trust for Wales, explained how the proposal for an historic environment network had developed over the past two years, to the point where a project outline had been submitted to Cadw and the Minister's Historic Environment Group for discussion. This had been circulated to participants in advance of the meeting. The National Trust, the Institute of Historic Building Conservation, and the WCVA had taken part from the beginning in the discussions leading to this stage. Dr Griffiths also commented briefly on the structure of Heritage Link, and on discussions about a support infrastructure for the historic environment underway in Scotland.

Following this introduction *Kate Pugh*, secretary of Heritage Link, sketched out the organisational and funding structure of her organisation, and set out some of the issues participants would need to consider.

Erika Kluge (National Trust) and Bethan Lewis (WCVA) spoke briefly to indicate their support and the ways in which a network could be of benefit to all partners in the historic environment.

Two workshop sessions followed, focusing on

1. What should a heritage network do?
2. How should a heritage network be organised.

Groups reported back on these issues to a plenary session.

Plenary session

Groups were asked to report back in sequence. Comments were invited from Jean Booker (Cadw) as well as from the floor.

The feedback opened with one group proposing a formal motion:

“That the Civic Trust and the National Trust and WCVA be invited to form a steering group to draft terms of reference based on the recommendations made today for an historic environment network, co-opting others as they see fit and using today’s participants as a consultative forum.”

The meeting generally supported this way forward, given that any such process would acknowledge and seek to reconcile issues raised within the groups. It was accepted that an immediate step would be for the three bodies named, together with the Institute of Historic Building Conservation, which should also be on the steering group, to engage in discussions with Cadw about practical support for a project to develop a network, based broadly on the outline that had been tabled by the Civic Trust.

Participants in the seminar would be kept in touch via e-mail, while a show of hands indicated that most of the groups represented would be willing to be engaged in a steering group.

Feedback and discussion points

Groups were asked to feedback their priority remarks. The full output from each group would also be logged in the report of the seminar.

Role

Group 1 stressed that the importance of facilitating networking, and that the new structure should have the flexibility to adopt a lobbying role. It needed to have a clear representative structure and be responsive, flexible and able to adapt. It should be a tool for its members, able to offer and represent a sectoral view. It should communicate regularly with its constituents and be a source of specific advice, help and training.

Group 2 stressed the importance of information sharing, and the role of the organisation as a source of contact with the sector. It should be linked to HEG. It endorsed the comments made by Group 1.

Group 3 emphasised that information exchange should be “sideways and upwards”. The opportunity to act in an advocacy role for the sector was stressed, and the network should be able to unite members and define collective opinion. It should have the broader tasks of raising environmental awareness and sharing and promoting best practice. It should be a point of contact for information for organisations and networks. It should act in a consultative role with central and local government. It should be a champion for the historic environment.

Group 4 expressed its broad agreement with the Civic Trust proposal and the actions undertaken by Heritage Link. It was felt that the network should begin with modest ambitions but hit the ground running. There was a need now to move from talk into action; to get into the development phase. A priority should be to establish a communications medium for supporting organisations via a web site and e-mail list. Beyond that it stressed the advisory role. The group suggested the metaphor of a family tree of like-minded groups orbiting around a hub. It proposed an acronym to represent its ideals and reach: HICCUP (History, Identity, Cultural, Community, Understanding, People).

Group 5 argued for a broad view of heritage, comprehending people and events, not just sites, buildings and places. Their priority would be advocacy. The network should go forward as an independent voice. It should offer links to other partnerships and networks. Its acronym could be “WHeN”. There was a need to work bilingually.

Organisation

Group 1 argued that the differences between Wales and England should be reflected in a membership structure that differed from that of Heritage Link. It should engage all with a relevant interest, and could be split, like WEL, into subject groups providing a means of detailed engagement within topic areas. There should be an effort to embrace non-traditional heritage groups such as the Church in Wales. They noted that “voluntary sector” had been defined in 2000 by WAG’s voluntary sector scheme. Links with the public sector and professionals needed to be designed. Terms of reference

should be taken from current policy drivers and translated into a business plan and a work plan. A steering group should develop such a work plan and identify a funding model. There should be rapid progress to the establishment of a charity with a governing constitution.

Group 2 suggested that a consensus on the meaning of “historic environment” could develop through the recognition of common purposes but different themes within the membership. The network should be an arena for common interests and concerns and a loud voice for a consensus view. Its approach should be strategic, engaging with legislation or issues connected to major infrastructure proposals, and acting as an information provider. It envisaged a membership structure of umbrella groups, with entry for special interests lacking a network of their own. The organisation would be a charity governed by trustees, working as a company limited by guarantee. Member interests would be reflected in the composition of the board.

At least one member of staff was needed, and it was likely that there would be a dependence on WAG funding.

Group 3 supported an open membership structure, made up of groups rather than individuals but open to all relevant groups not solely umbrella organisations. Individuals might have affiliate status. Governance should be based on a charitable structure with a steering group of no more than seven set up to develop the organisation. A facilitator/administrator would be needed at this stage. There would be a priority to identify sustainable funding and ideally membership would be free. The organisation would need a paid post and should not be Cardiff-centric.

Group 4 wanted an inclusive definition of heritage that would not discourage membership. There was a need to offer a home to some groups that lack an umbrella. There was the potential for a tiered membership and fee structure, and for sub-groups to focus on specific interest areas. Governance should be through the charitable structure that had been identified, with the Civic Trust as the initial host. Stakeholders should form a steering group; these could mutate into trustees. Ideally the latter would not be the usual suspects and the board should embrace a good mix of organisations and interests. WAG should be closely engaged in the development phase.

An initial staffing load of 2 x 0.5FTE was suggested. The development phase should take a year or less as it was thought that much could be done in six months. Thereafter a research officer should be an early priority.

Group 5 stressed an inclusive membership structure, made up of organisations rather than individuals. It could be a home for small groups to find a voice, and not confined to umbrella organisations. It would need links with Government, local government and academe. It was suggested that membership at start-up might be free and that income should be sought from grant-making trusts. Independence from funding sources was essential. A steering group should be drawn from amongst those present at the seminar, with participants forming a forum that could discuss proposals prior to formal establishment. Guidance from WEL could be sought.

As an initial step it was agreed that an e-mail list be formed based on those present and the output of the meeting circulated for comment.

In addition it was suggested all attendees be asked to submit a paragraph on a matter of interest or concern as the first step to ensuring grass roots involvement.

Response by Jean Booker (Cadw)

Jean stressed how helpful she had found the day. It had been focused and practical, and Kate Pugh's contribution had been extremely useful. Cadw was very supportive of the third sector and wanted to engage that sector in partnership. Not least, a link organisation would be extremely useful in responding to Government consultation. Jean reminded the meeting of the existence of Heritage Initiatives grant, with up to £5K on offer as match funding to small projects.

Cadw wanted to move along the development of a heritage/HE network and would help to fund this process. Moreover, Government recognised the need for an independent structure that would not be inhibited from adopting a campaigning role. In recognising the need for independence, it was important that it should not be wholly dependent on Government funding. Other partners also needed to chip in with resources.

She also emphasised the potential for a network to make links with other agendas within WAG and draw on these, for example by providing evidence for the added value of heritage in relation to regeneration, sustainable development and climate change impacts. There was a need to liaise with WEL.

She suggested that an affiliate membership structure might enable a connection with HLF and even commercial organisations.

The work involved at set up should not be underestimated. There was a need to establish a charity and put together funding bids. There was a need too to find outside contacts and make links with other disciplines: a network should look beyond its member to a wider audience and the wider world.

The Heritage Network would be on the agenda of Treftadaeth in July, when the Minister would be present; it was also on the agenda of the third sector meeting with the Minister on 2 June.

APPENDIX 1

Briefing by Kate Pugh: the role and structure of Heritage Link

Kate outlined the development of HL and the evolution of its role since the initial debate about a means of bringing together a fragmented sector in 2000. HL aims to provide a coherent collective voice for the sector, influencing policy, underpinning advocacy, and increasing capacity. The network provides a means to share information and to respond to consultations. Its role reflects the fact that the majority of those owning, caring and managing the “heritage” are in the non-governmental sector.

Heritage is defined in the same way as the HLF, with the exclusion of biodiversity. This implies “heritage”, not “historic environment” as it includes the mobile heritage. By contrast the Scots Built Environment Forum (BEFS) focuses on place-making.

Membership has risen from 42 to 78 organisations which are national with some regional in character. It is a network of networks/umbrella organisation. It defines “non-government” loosely, offering a big tent. It includes two non-departmental public bodies, which are also registered charities. It does not include single sites. No major gap is un-covered; essentially it is a bottom-up organisation.

It has a small, two-person staff. Its members work through groups reflecting overwhelming concerns (funding, planning and inclusion) which are reviewed on a triennial basis. Interests include spatial heritage protection, education and rural heritage. It organises national events, and an annual Heritage Day. A two-year project focused on diversity (2006-8).

Engaging members in consultation responses raises profile and strengthens cohesion.

The web site is a major platform for sharing good practice.

Campaigning and lobbying has focused on VAT, heritage protection, local government resourcing, and Lottery funding.

The E-bulletin, *Heritage Link Update*, reaches 10,000 mailboxes in the UK.

In structure HL has a chair and board, who are members in a personal capacity but from stakeholder organisations. There is a regular audit of competencies and skills at board level. Recruitment is open and members can nominate to the board.

Start-up funding came from the National Trust. English Heritage provided capacity building funding. Currently 67 percent of income comes from Government; this is regarded as too high. Subscriptions were originally a flat rate £100. There is now a tiered subscription based on turnover. More substantial donations are accepted. Projects are externally funded (Places of Worship Group, Discovering Places, Embracing Difference), and appear as “received funds”.

Premises are currently shared with Wildlife and Countryside Link; this has been useful while Heritage Link has been growing up. It now seeks its own home.

Heritage Link needs to continue to secure wider support; to sustain its credibility; to demonstrate its effectiveness; and to embrace new methods of engagement (for instance, through social networking), as it adapts to a changing environment.

APPENDIX 2

Group outputs

Output from groups: role

This section lists the suggestions and debating points identified in the workshop.

There is a need to define “heritage” and a balance needs to be struck between inclusivity and exclusivity. Sub-groups could focus on specific topics within the broader definition.

A broad definition of heritage would embrace:

- People, places and events
- Landscape in the broadest sense

The organisation should be characterised by passion, persistence and professionalism

A map of existing support mechanisms would clarify where a network would fit. Smaller groups are often unclear about who currently does what to whom.

Initial ambitions should be modest: the organisation will need to establish its relevance and develop a structure of communication embracing large and small member groups. A newsletter and a web site are priorities. It should then focus on capacity-building and good practice sharing. Advocacy will come once credibility and trust have been established. An advisory service should be considered.

Membership should define roles: it should be open to all, but focus on member organisations not individuals

Information sharing

Information sharing should be “upwards and downwards, relevant and targeted”

Information exchange should be “sideways and upwards”

Networking – a huge potential benefit

Advocacy for members and the heritage

It should enable other interests (e.g., the Church in Wales) to have an input into heritage debates

A roving eye across policy areas would enable the heritage to be considered within different policy agendas.

Contact hard to reach groups

An advocate for good practice/a promoter of best practice – by example

A heritage champion

Neutral and objective as a forum able to influence Government policy

A partner with, not subordinate to, Government

Co-ordination within the sector

Provision of a voice for the sector

Ability to provide sectoral backing to messages given out by larger organisations – network-wide backing would validate consultation responses and campaigning activity

This voice should be independent

Ability to respond quickly and flexibly

It should have direct access to Government

It should be able to contact local government and decision-makers at this level

Liaison with local government on topics such as conservation and regeneration

Liaison with owners (buildings, historic gardens)

As in the case of WEL, a coordinated interface with politicians could allow for the capacity to develop a joint voice at election time.

A network would not preclude individual members from lobbying decision-makers on their own behalf or submitting their own consultation responses.

It should have links with other partnerships (e.g., WEL)

Communication between the sector and wider society

Platform for community engagement via ICT

An E-bulletin, weekly or monthly

Consultation responses

Events and meeting for the network

An annual event

Advice on funding

Advice and information on the relationship between heritage and social and economic regeneration and tourism

Representation (for example on HEG)

Directory of contacts

External relationships – for example, with Heritage Link, with the potential for joint campaign (VAT, for instance)

Dissemination of experience and best practice

Use of web/ICT to support members

Add value to the work of its members through networking and educational activity

Provide a home for groups without an umbrella organisation

Output from groups: organisation and governance

This section lists the suggestions and debating points identified in the workshop.

Membership structure

The organisation should define the historic environment as “whatever people think it is”. It should allow for different interests, with a wide reach that facilitates networking and provides an arena for different groups and opinions. It should be able to unite the fragments, and articulate common themes and concerns in a loud voice. Its focus should be strategic rather than specific. It should be able to advise on legislation or museums good practice.

“The historic environment should be defined broadly, enabling a wide membership. It would include the built heritage, landscape, archaeology and culture. It would respond to anything with a physical presence, and to traces of human activity.”

“To acknowledge the present we need to make the past speak.”

“Definition should enable the organisation to inform current practice and projects, and give it an educational capacity.”

“The area of interest should be “historic environment”; the organisation should be as inclusive as possible, but not subservient to the “arts”. It would include built environment, matters with a physical presence, landscape, archaeology, and people, myths and legends that connect with a sense of place.”

“Membership needs to respond to a definition of heritage. One definition would be “what has gone before” – and relates to community, to culture and to identity. We have a preference for the term “historic environment” – comprising buildings, gardens, artefacts and landscape. We could call the network HICCUP Wales (History, Identity, Cultural, Community, Understanding, People).”

“Membership should be inclusive. It should respond to the historic environment. Interests would include archaeology, built heritage, historic landscape and townscape. It should engage any group concerned with the physical presence of the past and traces of human activity in the past. It should recognise and respond to gaps in the current system.”

Membership should represent an umbrella for umbrella group. Special interest groups could be included ; individuals might be offered affiliate membership. Every full member should have equal status.

Membership should be tiered and thus could attract all 600 or so groups that have a heritage connexion – with a minimum £10 fee per member organisation. Membership needs to be inclusive because many groups have no umbrella body. Sub groups could represent interest areas.

Membership should be by group, not individual.

Membership could include local, regional and national bodies.

Would the network membership accept local, regional or subject specific groups that are not represented in a national body – Heritage Link only accepts networks as members, but would this work in Wales?

Membership structure needs to recognise Wales's cultural identity and size and therefore need not mirror the structure of Heritage Link.

Membership should not be limited to national organisations, but should be open to any group.

Membership structure should not alienate individuals who can't find a group appropriate to their interests. Differential membership could identify groups as full members at the outset and find a means at a later stage of recognising individuals.

Information provision would include a database of groups: individuals should be pointed at an appropriate group.

A web site might have an open and closed structure.

Membership could be focused through interest groups and working groups. Membership could be organised in an interest-group structure (cf. WEL) but members would not be obliged to be part of a subject group, just opt to receive information and support the network's objects.

There is already a definition of voluntary sector body (WAG VS Scheme, 2000)

Organisations who are members need to be cohesive enough not to dilute network messages

Terms of reference should be drawn from current policy agenda drivers and current priorities: this would help to define the nature of the organisations that should be members.

Historic landscapes are a strong area of interest in Wales, "unlike in England or Scotland"

Local authorities should not be members

Governance/staffing/hosting

The organisation should be a charity and a company limited by guarantee, incorporated as a trust

Registered charity

A membership structure is need for charitable status and to attract WAG funding

Civic Trust should be the initial host prior to formal establishment

The Civic Trust could provide initial accommodation.

A volunteer steering group is needed.

A proto-trustee group is needed as an advisory body with a good mix of members

A simple structure – chair, board and executive

At this stage a small steering group is needed

Initial steering group should draft a constitution

Funding/staffing

Funding should be modelled on WEL.

Funding should be through member subscription (tiered?)

Subscriptions should be tiered according to turnover or membership

Funding: Cadw should be asked to provide 100% funding in Y1

A minimum of one person is needed (sic). WAG or HLF should fund a professional post. The initial postholder might be a secondee.

WAG funding should not hamper independence. The relationship should be with the Minister rather than Cadw.

Staffing: start with two (PT?) people – one strategic, one administrative

Development: start small, with phase 1 taking less than a year. This would lead to employment of a research officer and a full-time administrator

Bids to charitable trusts

Free start up for members?

Funders should not be in control

Planning/development

The organisation will need an annual business plan as a means to measure success. We need to be able to test whether members' expectations have been met and whether it has been effective in meeting its goals and targets.

Annual work plans must have deliverable targets which are measurable

The next step is to establish a steering group to secure funding and develop a work plan. This needs to be done now so as to harness momentum. Ring-fenced funds could go to a heritage organisation to begin this work.

The steering group should be small enough for consensus, large enough to count. Organisations might include voluntary representatives from HBC, APT, the Georgians, the Garden Trust... etc.

The steering group should have a maximum of seven members including the Civic Trust and built environment interests and should be drawn from across Wales. The first step is to construct a contact list and to secure a paragraph from each organisation that could be circulated as a means to setting up an information network.

The steering group should be a maximum of seven and should be representative of Wales; it could have a mix of public, private and voluntary interests.

The initial job is to establish a steering group. This will work with other groups to produce a constitution. In the interim, progress and policy/constitution drafts should be validated by those present at this seminar or in the Treftadaeth meetings.

Rhydywaith Treftadaeth Cymru?

One way forward

There should be a call for nominations to a steering group

A list of potential members should be identified

Could Civic Trust facilitate this process?

The proceedings of the seminar need to be summarised for delegates

Could an initial member of staff be a secondment?

There is a need to identify start-up funding.

A forum for consultation could be based on participation in this seminar.

E-mail responses should be sought.

The approach should be open, welcoming to large and small.

The advice of WEL should be sought.

Ask NT, CTW and WCVA to steer this proposal and co-opt a steering group from this forum.