

Communities, Equality and Local Government Committee

Inquiry into the Welsh Government's Historic Environment Policy

Response from Civic Trust for Wales

Background

The Civic Trust for Wales is a charity, established in 1964. Its remit is concerned broadly with quality in the built environment. Its interests therefore span the themes of conservation, planning and urban design, and these are reflected, for example, in the content of our magazine, *About Wales*, and web site. Our financial support comes in the main from Cadw. We draw additionally a modest income from membership subscriptions, and events. We are currently also benefitting from a HLF grant to support a community focused project on urban characterisation.

The director is a member of the government's Historic Environment Group. He and colleagues are taking part in the current round of consultations regarding the proposed heritage bill.

The Trust has 2.4 FTE staff. The director (FT) and the development officer (0.4 FTE), are funded via core grant. A project officer is currently employed as a FTE. Initially employed to lead the characterisation project and funded 0.4 FTE by HLF income, she has also taken on a 0.6 FTE post on a short-term basis to manage the Trust's Open Doors Days programme for this year.

The Trust is overseen by a board of trustees, chaired by Maureen Kelly Owen, an architect. The board includes built environment professionals and people active in the network of civic societies that the Trust supports.

There are more than fifty civic societies in Wales. They have a primarily urban focus. Societies register with the Trust, but are not 'members'. Registration associates them with the objectives of the Trust and entitles them to advice, support, exposure to wider public networks, invitations to events, and free copies of our publications.

The Trust's activities and historic environment policy

Uniting the Trust's activities is the theme of *sense of place* and what this means to people in Welsh towns and cities. The Trust's areas of interest enable it to promote an holistic approach to the everyday environment of local communities. We seek to promote understanding of the historic and built environment; enable access to the heritage – past, present and future; and facilitate active engagement on the part of our member societies and their partners. Through our magazine, web site and social networking we reach a varied constituency of partner organisations, voluntary sector

groups, decision-makers, academics and individuals. While we have a special remit for civic societies, we communicate with and engage a wider range of voluntary sector interests, not least through Open Doors Days, the Welsh contribution to European Heritage Days. This is the largest voluntary sector led events programme in the historic environment sector in Wales, drawing further strength through its relationship with a wider UK and European initiative.

Currently, historic environment is packaged with regeneration and housing in the definition of ministerial responsibilities. We believe this is appropriate, enabling synergy between key policy areas, and reflecting the contribution conservation and protection of the historic environment make to the physical and social regeneration of communities.

Issues

The Trust is a small organisation, with limited resources. We are grateful for the support Cadw has consistently offered. Inevitably, we experienced a modest reduction in core funding in 2011-12, and we are aware that the support we currently receive is under review. We believe we offer considerable value for money. There are strengths and weaknesses to our organisation, and in our capacity to deliver.

Strengths

- Open Doors Days is a successful programme. The support given to it by Cadw means that we have been able to mobilise significant voluntary sector effort to develop a rich and varied programme. The event takes place throughout September, on weekdays and weekends. In 2011 it built on previous years' success to offer local people and visitors an opportunity to explore the Welsh heritage. It involves key partnerships with Cadw, the National Trust, local authorities and third sector organisations and is the largest volunteering event in the heritage sector. More than three hundred sites took part; there were over five hundred individual events; more than 1,800 volunteers led and supported local activities. Its USP is free access to sites of historic and architectural interest. This year's programme will be on broadly similar lines, but there has been additional direct and indirect support from Cadw to enable the development of better promotional material and to support improved media exposure/promotion. Currently, the programme is supported by one 0.6 FTE project manager, with support from colleagues. To meet its potential, Open Doors needs at least a full time development worker and an enlarged budget for marketing and training. We believe there may be the opportunity for a more formal partnership structure behind the management of the initiative that could involve other third sector organisations.

As part of the development of Open Doors we have encouraged the growth of clusters of events in Welsh towns. These have proven successful in terms of building local investment and local promotion of the programme and in ensuring that local activities reflect the aspirations, concerns and voluntary effort of each community. Important clusters have developed or are being pursued in areas of economic and social stress, for example in Holyhead and the South Wales valleys.

- Supported by the HLF we are developing resources that will support community groups in undertaking urban characterisation projects, either in partnership with local authorities or as independent initiatives. The formal project is three months old, and has seen the Trust engaging with civic societies and their partners in Abergavenny and Newtown. We are developing a field manual but also documenting the process of community engagement so that at the end of the project the toolkit we offer will consider organisational and capacity-building issues as well as a field guide, and advice on the structure/means of publication of local studies. The programme will be extended to Machynlleth in due course; meanwhile we have also encouraged and supported a survey being carried out by our affiliated group in Kidwelly. Cadw is closely supportive of this project, as are relevant local authority partners. We believe that this form of local community engagement can contribute significantly to an agreed and sustainable approach to the management of change in the urban environment and to more formal regeneration initiatives.
- Independently of the HLF project, we recently completed an urban characterisation report on Barry Island, carried out to support the activities of the Barry Regeneration Partnership. This was commissioned by Cadw and will be published alongside its own reports on Welsh towns, whose structure it adopts.

Weaknesses

The Trust recognises a number of weaknesses in its organisation and delivery which need to be addressed.

- The focus on the development of Open Doors Days over the past five years or so has severely limited the time staff have been able to devote to support of the Trust's network. Grant applications to develop a focused capacity-building programme have so far been unsuccessful. We need to be innovative in addressing this deficit.
- Open Doors itself is not supported to enable it to meet its full potential.
- Our magazine, *About Wales*, is attractive and well-regarded. However, a funding shortfall in 2011-12 meant that two planned editions were cancelled. We resumed publication in May, and hope to produce a further edition this year, subject to financial and human resources.
- Likewise, limited time has been devoted over the past twelve months to development and enrichment of our web site. We plan to re-launch a more manageable site shortly but have concerns about our capacity to ensure that its content is fresh and varied.
- Governance needs to be strengthened, and the Trust plans to restructure its board to create a smaller and more effective executive body, on this basis recruiting new trustees who can take the organisation forward during what is likely to be a period of change and difficult financial circumstances. This will involve a revised approach to formal engagement with the network, with an annual conference (from 2013) envisaged as a forum within which liaison with civic societies can take place, and enable us where appropriate to reflect their views and aspirations to government.
- With staff resources severely stretched, the Trust does not engage as it would like in policy matters. We are represented on the Historic Environment Group; we try to maintain

engagement with the formal voluntary sector process whereby representatives of the sector meet twice-yearly with the HRH minister, but have missed one cycle; we have suspended engagement with the equivalent forum for third sector groups concerned with the planning system. We are currently focusing on our contribution to the discussions around the planned heritage bill.

Moving forward

Our operational plan 2012-13 supports a programme in which the Trust

- Restores publication of the magazine, and continues the planned development of related online material, achieving greater integration of website and print publication.
- Maintains the quality and character of Open Doors, supported by fresh marketing material and by a new bilingual website.
- Runs a successful grassroots characterisation project, funded by the HLF
- Achieves the remodelling of governance envisaged by the Board in December 2011
- Takes steps to restore a satisfactory measure of support for civic societies, and in particular sets the scene for an improved structure of formal engagement through an annual conference.

These steps are designed as the prelude to actions that will further strengthen the Trust's ability to support local amenity groups; develop and expand Open Doors; and provide a stable platform on which to bid for and manage future grant-supported projects.

The Plan identifies **Open Doors** as a separate cost centre, and disaggregates staff costs, premises costs, support costs and promotional costs from core activities, with the exception of the Director's management and governance time.

Core activities are defined as:

- **Network support** time devoted to provision of support to the civic society network – for example, visiting local groups, providing written or oral advice, developing informational literature. We plan to prepare the ground this year for a significant extension of support/capacity building/network growth in 2013-14, as envisaged in the Moving Forward document. Civic societies represent a significant volunteer contribution to the understanding, interpretation and safeguarding of the historic and built environment. A new approach to Open Doors will enable a renewed focus on this core element of the Trust's role.
- **Project support** In 2012-13, primarily time devoted to support of the characterisation project and in particular development of a toolkit appropriate to grass roots engagement with urban characterisation.
- **Audience development** Time primarily devoted to the writing, editing, design, illustration and layout of the magazine, and to the development, design, coding and management of the Trust's website, including a significant new microsite devoted to characterisation. The Plan envisages ever closer integration between print and online publication

Strategy overview

However, we know that these steps need to be the prelude to actions that will further strengthen the Trust's ability to support local amenity groups; develop and expand Open Doors; and provide a stable platform on which to bid for and manage future grant-supported projects. We foresee a scenario

- in which Open Doors expands as a focus for public access to and engagement with the historic and built environment;
- in which the Trust is able to provide an effective support and capacity-building service for the voluntary effort represented by civic societies and allied groups; widens its constituency amongst local third sector organisations; and works successfully to ensure their fitness for purpose;
- in which new and old media are exploited to support these goals; and
- in which the Trust forms successful partnerships with other third sector organisations, and national and local government in delivering these core objectives alongside a programme of project and event delivery.

In the immediate past, the Trust has been handicapped by limited resources, and, in focusing staff time on the maintenance and expansion of Open Doors, has been unable either to deliver the support it would have liked to civic societies, or to develop its publications as intended. Notwithstanding this, it has proved capable of securing Lottery funding for an important project that will engage local communities and civic societies with characterisation methodologies, as well as undertaking the Barry Island characterisation study for Cadw.

The future we envisage is one in which the productive partnership between Trust and Cadw sustains its core activity in relation to its network and its publication programme. To achieve this, a new approach may be required to Open Doors. In addition, the Trust will welcome opportunities to form strategic partnerships with parallel organisations.

We believe these goals are important, because both the Trust, and the amenity groups it supports, offer something special which cannot be matched elsewhere in the third sector in terms of public understanding of the local historic and built environment and what this means to communities in Wales. There is an obvious synergy between the way the Trust and its network have, historically, thought about places and what makes them special, and government's recognition that the historic character of towns is key to sense of place, local identity, and successful management and regeneration strategies.

The Civic Trust is special because, uniquely as an environmental charity, it combines a focus on historic environment with an appreciation of urban design, planning and sustainability issues. It has always thought about the urban environment holistically, and in a way that makes connections between past, present and future of the places where we live and work.

The Trust has a focus on the quality of life in Welsh towns, how this is influenced by community engagement with urban character, and how a sense of place should in turn influence decisions about growth and development. Analysing how and why places have developed and changed, and what is positive about the physical legacy of the past feeds through into approaches to urban design that respect the significance and value people sense in their familiar surroundings.

These concerns have been expressed historically through support for a network of civic societies and through partnerships with government and other organisations to deliver specific actions and objectives.

In praise of civic societies

Civic societies are special as a model of grassroots environmental concern, advocacy and action. They predate the foundation of the regional civic trusts in Scotland, Wales and England. Concerned about sense of place and local character, they engage with conservation and development issues through planning casework and actions to promote public understanding. The membership of civic societies forms an important volunteer resource dedicated to understanding the historic and built environment of Welsh towns and cities, sharing this knowledge within communities, and taking action to ensure that future development respects the best of the past.

Civic societies are unusual amongst voluntary environmental groups in that they combine concerns for good design, conservation and economic vitality, and therefore have the potential to contribute to the character and focus of regeneration initiatives. To be effective, however, they need to be fit for purpose, and this is an important objective for the Trust.

Building on this model for the new century

The new century brings new challenges, as the process leading up to the Heritage Bill underlines. New political frameworks, new approaches to planning and design, new technologies each provide opportunities for the network to engage with partners in national and local government and the third sector. At the same time new environmental and economic challenges face local communities and the places where we live and work.

The Trust needs to evolve in order to help civic societies and allied groups do their job better, at the same time as it builds on its successes in pioneering free access to the hidden heritage and developing publications promote understanding and discussion of place and character. A strategy for the next ten years should focus on

- Ensuring the Trust has the organisational strength to develop and expand its network
- Building on the success of Open Doors
- Securing a future for the magazine and developing its online presence
- Successfully bidding for project support which enables ideas to be transformed.

This strategy sets out short-term proposals to address the difficulties the Trust has experienced over the past few years, and longer-term actions that will enable the Trust to deliver on this exciting agenda.

The Trust's partnership with government is at the heart of this strategy. It represents a successful expression of government's co-operation with the third sector. Inevitably such relationships will adjust as government matches resources to its priorities. The Trust welcomes the opportunity this scenario represents to develop new partnerships within the sector that will enable the successful delivery of collective goals. Such partnerships may offer a way forward for Open Doors. There is also the potential to look afresh at the roles third sector organisations concerned with the historic environment play in Wales and consider how joint working and collaboration could prove effective in achieving both greater value for money and synergies which ensure quality delivery.

Moving forward: civic societies

The need to rebuild and remodel the Trust's relationship with and support for civic societies needs to be at the heart of its strategic development. As a result of the demands of the Open Doors programme we have had reduced capacity for society support and development. Notwithstanding this, we continue to promote society involvement with Open Doors, and our characterisation project has been developed in association with relevant civic societies. The Director is initiating a series of talks to societies in which he aims to show how characterisation insights can enhance their understanding of place.

In 2010 the Trust carried out a searching audit of civic society aspirations and capacity, identifying a need to support societies in developing their knowledge of heritage, planning and sustainability issues; promoting themselves within their communities through new and old media; organising themselves with greater efficiency; and developing local partnerships. We made an unsuccessful bid to the Big Lottery to support a capacity-building programme, and are now exploring options for a revised bid.

We will look again for project-specific funding for an initiative of this kind. Societies need support to develop the skills and confidence to fulfil their potential to contribute to the revitalisation of communities and to share their recognition of the role of character and place in making the towns of tomorrow. With or without project-related funding, we need to:

- Develop the capacity of civic and amenity societies to act as civic champions for the historic and built environment within their communities, and thereby promote the physical and social revitalisation of communities through developing environmental awareness, campaigning and practical projects.
- Develop the organisational strength and confidence of civic and amenity groups as key voluntary sector agencies within Welsh communities, and hence their confidence and skills in running community environmental projects that contribute to community revitalisation and social sustainability
- Develop the capacity of individuals to act as champions of the local environment and as actors and enablers within their societies and within their communities

- Support societies in their development of assets that will help young people develop an understanding of the local environment, how it is changing, and how they can grow as local citizens

Consultation with the network tells us that we need to help societies develop

- Their knowledge of the historic built environment and related planning, design and development issues
- Their confidence in communications and campaigning
- Manage themselves successfully as charitable organisations
- Their ability to engaging with wider community, including young people

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Without specific additional project-specific grant for this sort of programme, the Trust has the current expertise that could enable it to focus its network support on actions to achieve these goals, provided that a new funding basis is identified for Open Doors, separate from the Trust's core grant.

Moving forward: widening the network?

Moreover, we believe that the societies within the existing network will benefit if the Trust is in a position to expand its constituency to a range of parallel local organisations – groups that often act in partnership with civic societies.

The Trust investigated the development of an historic environment network in Wales on behalf of Cadw, working with other Welsh HE groups to achieve this. While funding could not be identified to take this initiative further, the Trust retains the knowledge base and contact information that this project yielded. It remains the case that there are many local groups, unsupported by a national network or umbrella body, that have similar concerns, if a narrower remit, to civic societies. We engage with some of these groups through Open Doors, which in its own way is beginning to develop aspects of a network. ***We believe that it could be beneficial both to the Trust and to organisations of this kind were our network to expand through offering them membership and support. We continue to believe, independently of our own aspirations, that the wider historic environment third sector groups in Wales would benefit from a modest but robust network that would provide them with information, build their capacity – severally and jointly, and facilitate communication with central and local government.***

Moving forward: characterisation

The Trust aims to complete an HLF funded project on characterisation over the next twelve months. The project will deliver, *inter alia*, a toolkit to support community groups and local authority partners in undertaking urban character studies.

However, we envisage a longer term focus on characterisation. Concern for local character, and the need to learn from this in designing for tomorrow, is an intuitive understanding for local amenity

societies. However, a more formal approach to characterisation has a lot to offer civic groups, whether or not this is expressed through a character study. The methodology offers the means for societies to analyse the towns in which they work in a systematic way, using a vocabulary that is shared with planners, urban designers and decision makers. The Trust is currently responding to requests from societies for briefings on characterisation. We believe that the acquisition and application of this methodology will help societies be more proactive and effective in their dialogues with community partners and with local government.

We therefore propose to put a priority on developing grassroots understanding of characterisation in our programme of network support.

Moving forward: publications

The Trust is renewing publication of *About Wales*. This has evolved to become an attractively designed full-colour publication that publishes highly visual articles on topics related to urban character and sense of place. It is well-regarded, but has been handicapped by logistical and financial difficulties in achieving regular publication.

Much of the content of *About Wales* has the potential to be repurposed or developed online. Since it engages with urban character, and is supported by extensive high quality photography, the Trust needs to develop the value in this resource, for example through support for society capacity building, and the provision of targeted educational resources.

We will continue to distribute *About Wales* for free to societies, and to friends and partners. We have a small additional subscription income. ***We believe that there is potential to develop the audience for the magazine amongst organisations in the HE-related third sector, and that this effort should be linked with actions to extend the Trust's network.***

At the same time we will focus our web site specifically around content related to the content of the magazine, aiming for an effective integration of magazine and the primary elements of the site. Related microsites will promote project-related material will support society capacity building, specific projects, and Open Doors (which is likely to develop and independent web presence).

We will build on current experience of social networking so that it continues to develop our audience within the wider HE sector as well as to function as a key marketing tool for Open Doors.

Conclusions

The Trust programmes play a significant part in implementing historic environment policy. In a modest way the Trust has helped to influence and shape that policy. There are hindrances to our effectiveness, but we continue to be grateful to government, and particularly to Cadw, for its support for our role.

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