

# Heritage Trust Network Strategic Plan 2025-30

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## 1 Why Heritage Trust Network is needed

### Our members

Tens of thousands of people are engaged in community-led heritage action throughout the UK:

- rescuing well-loved local buildings, structures, spaces and landscapes,
- restoring adapting and finding new uses for them,
- maintaining and managing them as social enterprises.

This work is needed because:

- people passionately want to maintain the buildings and spaces that embody their memories and give their communities identity and meaning,
- it provides vital space for community facilities, independent businesses, homes, visitor attractions, leisure, education, arts and culture,
- it provides jobs and supports local economies,
- it provides fulfilling volunteering opportunities,
- it rescues heritage at risk and ensures it has a sustainable future.

This ecosystem of local heritage action has a breadth and reach that the larger national heritage bodies cannot achieve, into local communities, neighbourhoods, town centres and remote rural areas.

As local authorities and other public bodies come under financial pressure and often dispose of heritage assets, it is often the community that can provide solutions that find futures for those assets while continuing to deliver public benefit.

The community heritage sector does not have boundaries. It is part of the heritage sector but is also part of the community ownership and enterprise space. Community heritage organisations have links to the wider voluntary sector, local businesses, regeneration partnerships, arts and culture and all aspects of local life.

### Our Network

To achieve all this our community heritage organisations need information and guidance, they need expertise, they need opportunities to learn from each other, they need help when they face obstacles. This is what the Network provides, by facilitating peer-networking and peer-learning, connecting members with partners and business, providing expertise, support, inspiration and a sense of community.

## 1.1 Impact

### Our members impact

Results from our 2023 impact survey of members indicates that our members completed 240 heritage restoration projects during 2023 spending nearly £30million and restoring 46,000 square meters of space and 65 hectares of land. This removed 43 properties from the at risk register while they acquired 54 more sites for future restoration.

Between them our members employ over 3,800 people with a further 4,000 employed on the sites they manage. They engage 18,000 volunteers.

There are 1,520 homes on sites managed by our members

The total turnover of our members was £138 million

£66m of their income was from trading activities, £5m from donations and £45m from grant funding.

### The Network's impact

The Network has a major impact on the success of community heritage organisations.

In 2023 the Network organised 53 events attended by 1,113 people

192 member support cases were recorded in 2023. This is likely to be an underestimate as support is often informal and not recorded.

There are 364 pages and 350 documents in Toolkit. In a typical year they are referred to 13,000 times.

"The Network has great potential to do more of what it does as there are gaps in support for Heritage projects which the Network fills extremely well."

"I don't know what I would do if we didn't have Heritage Trust Network behind us."

"Our experience of the Heritage Trust Network has been nothing short of brilliant! We couldn't imagine life without them to be honest, and goodness knows who we would have turned to for advice had the Network not been in existence."

"We have learned a lot from the various workshops/online sessions to help us make progress on our journey to save our building."

"We have benefitted from the wealth of knowledge of the Network staff and members and their advice and guidance has been second to none, especially around some of the complications associated with writing such massive funding bids like ours."

"The content at the event was super, very well-orchestrated. The case studies and learnings reported were so very insightful. I touch-typed 9 pages of notes!"

## 1.2 Mission

Our mission is to empower people to rescue and reuse historic buildings and spaces for the benefit of their communities.

## 1.3 Vision

Our vision is that in the four countries of the UK, independent not-for-profit heritage organisations are flourishing and play a significant, and widely recognised, role in regeneration, community development, climate action, the promotion of wellbeing and rescuing heritage at risk.

## 2 Values

	What we mean	How will we live our values
<b>Responsive</b>	We are responsive to our members. We offer friendly interaction and engagement. We listen to member needs and develop resources to meet those needs as quickly as we can. We adapt what is on offer to help members. We operate under a collaborative approach in dealing with our stakeholders.	Ensuring we build in a feedback mechanism as to how we gather it from members in order to shape what we deliver. We need a way to understand their ongoing needs. Staff training in how to deal with everyone via email/phone/face to face. Brand guidelines/tone document (later phase of this work). Build in a way to create collaboration in terms of 2 way communication, feedback and tailored approach with stakeholders.
<b>Reliable</b>	You can trust us and in turn, our members. The advice and guidance that the Network gives to members is grounded in their experience, evidence and the knowledge of industry experts. Our support improves how members operate and how they meet the needs of communities, funders and stakeholders.	Offer high quality content to members. Be transparent and clear about what we do and why we do it. Clear communication.
<b>Inclusive</b>	We strive to take the lead in creating a more diverse, inclusive and equitable heritage sector. We reach out to new groups of people, remove barriers to participation and actively support those who experience disadvantage and discrimination.	Have diversity and inclusivity as a thread that flows through all work streams, projects, tasks, strategies etc.
<b>Courageous</b>	We are ambitious in terms of what we set out to do and how we strive to continuously improve and be more efficient and effective. We are innovative, take risks and learn from failure as well as success.	Regularly review the strategies of the organisation and aim high! Build in regular opportunities to be more efficient.

## 3 Strategic objectives

- A. Encourage people to get involved in rescuing, restoring, reusing and managing heritage buildings, structures and spaces by forming new, or through existing, not-for-profit organisations (charities, community organisations and social enterprises).
- B. Help our members and other not-for-profit organisations to succeed in rescuing, restoring, reusing and managing local heritage for the benefit of their communities
- C. Raise the profile of not-for-profit organisations working with local heritage among key stakeholders whose decisions will influence whether they succeed

- D. Increase the diversity of people involved in grassroots action for heritage and ensure that our Network and the wider sector is an inclusive and welcoming place
- E. Improve the legislative, policy and funding environment to facilitate grassroots action for heritage

## 4 Strategic actions

To achieve our strategic objectives we need to take the next step up in our development as an organisation, positioning ourselves to connect and support many more community heritage organisations, heritage businesses that support them, local authorities that want to work with them, and young people aspiring to join them.

- A. Develop our services to our members and the wider community heritage sector
- B. Grow our membership bringing the overwhelming majority of eligible organisations into membership
- C. Bring new groups of people and organisations into membership where this supports our strategic objectives and builds our resilience.
- D. Raise the profile of our Network so we are recognised as...
  - the go-to place for independent non-profit heritage enterprises to seek advice, support and learning from their peers and other industry experts,
  - an effective advocate for non-profit organisations restoring and managing heritage sites
- E. Become a more diverse and inclusive organisation at all levels
- F. Build relationships and partnerships with key organisations
- G. Become a more effective and resilient organisation

## 5 Measuring success

Our approach to measuring our success and evaluating our projects and activities is:

Creating a performance measurement, feedback and evaluation framework for the organisation as a whole which can then provide the data, analysis and reflection that individual projects need.

Developing our digital systems so that we are capturing all aspects of engagement and can analyse these in various ways

Capturing qualitative and narrative information in the form of feedback, case studies and member stories.

Ensuring that reflection and learning are the core activities of our evaluation practice (rather than just processing and presenting data)

The table on the following page relates our strategic objectives and actions to success measures.

Strategic action	Strategic objectives supported	Quantitative measurements	Qualitative measurements
A. Develop our services	B. Help our members succeed	Range of services Number of service elements delivered (e.g. events, cases) Number of people engaged	Customer feedback Member stories
B. Grow our membership	A. Encourage community heritage D. Increase diversity of people involved	Membership numbers Renewals and upgrades Member/customer profile data	
C. Bring in new groups	B. Help our members succeed D. Increase diversity of people involved	Membership numbers in target groups Engagement in target groups	
D. Raise our profile	A. Encourage community heritage C. Raise the profile of community heritage E. Improve policy environment	Communications outputs Communications engagement	Mentions by key individuals/organisations Spontaneous approaches from key organisations
E. Become more diverse and inclusive	A. Encourage community heritage D. Increase diversity of people involved	Member/customer profile data	Customer feedback Engagement with diversity organisations
F. Build relationships	A. Encourage community heritage B. Help our members succeed C. Raise the profile of community heritage E. Improve policy environment	Referrals from other organisations	Records of meetings with key organisations Spontaneous approaches from key organisations Joint actions/partnerships with key organisations
G. Become more effective and resilient	Underpins all above	Financial metrics Earned income	Customer feedback Staff and trustee recruitment and succession Reported blockages/inefficiencies

## 6 Implementing the strategy

These are our plans for implementing the Strategic actions in 4 above.

### 6.1 Develop our services to our members and the wider community heritage sector

Our core services to our members are:

Casework: responding to questions and support requests that come to us from members (and sometimes non-members)

Learning and networking events, in-person and online.

Providing information, news and opportunities through our newsletters.

Toolkit: providing an online knowledge bank of advice and guidance to members

In addition we offer members introductions to other similar projects, listing in a member directory, job and volunteer opportunity advertising, special offers from Partner members.

We aim to continuously review and improve our services and (particularly during the development phase of Essential Networks) we have sought to both improve the way we delivery member services and pilot new services.

#### Improvements

Refining the casework system to ensure cases are processed and closed in a timely way.

Redesigning the newsletter and offering a separate member only Opportunities Bulletin

#### Innovations

Introduction of structured learning programmes for members at different levels of development

Development of a Health Check tool to thoroughly review member organisations functioning and performance.

Development of an Expert Panel to help support members (either paid or pro-bono)

**We will continue to develop and refine our member services, learning from our experiences and from what other organisations do. The improvements and innovations above will be continued and reviewed.**

### 6.2 Grow our membership, bringing the overwhelming majority of eligible organisations into membership.

We know that the demand for the support we can give is much greater than our current membership. We have 1,347 potential members listed on our CRM and we know that there are many more. In fulfilling our charitable objects. We do not want to exclude anyone from accessing the support the Network has to offer.

Hence, we are committed to growing our membership. Increased membership grows our earned income and earns us respect from funders and other key partner organisations.

In recent years we have taken a more systematic approach to membership growth.

- Researching potential members and adding them to the CRM.
- Inviting them to regular 'introduction to Heritage Trust Network' events
- Promoting membership on social media

- Presenting to staff in key partner organisations such as funders to encourage them to refer people to us.
- Simplifying the joining process
- Introducing the free 'Connect' class of membership to remove any barriers to joining
- Undertaken the Outreach Project in the Midlands and East of England in 2023

This strategy has been successful, and the Network has grown by four times over its life.

**We will continue with this strategy and look for further initiatives we can take to grow our membership.**

### 6.3 Bring new groups of people and organisations into membership where this supports our strategic objectives and builds our resilience.

While our core purpose is to encourage and support not-for-profit organisations, our strategic objectives are supported, and our resilience is built by developing our work with other groups of members. None of these membership groups are totally new to the Network, but undertaking targeted work to develop them is.

#### Young people

The Network has developed its work with young people because of the benefits it provides for the young people themselves, supporting them to understand and access the breadth of careers and volunteering opportunities that the community heritage sector can offer. It is also helpful to our members many of which want to engage better with young people. While it should not be considered as a solution to the challenges of diversity in the heritage sector, engaging young people also widens other dimensions of diversity such as ethnicity and colour, sexual orientation and gender identity.

The Network has always offered students free membership. In the past four years we have developed our youth forum as a successful and vibrant aspect of the Network with over 100 members.

We have shown leadership in recruiting young trustees to our board.

We undertook the Heritage Fund project Digital Heroes to introduce young, digitally skilled people to our members with digital challenges and we have incorporated this work into our mainstream activity.

We have offered four heritage traineeships within the Network staff team.

In 2024 we organised a Heritage Futures event in Wales, particularly targeted at young people considering a career in heritage and heritage organisations seeking to engage young people.

In 2022/3 we delivered a project to engage 10 to 20-year-olds in social action around heritage. This was a partial success, but engagement was challenging, and we decided that for the time being we should not seek to engage directly with minors.

**We will continue to develop our work with young people and seek dedicated resource to develop these activities.**

#### Local authorities<sup>1</sup>

Local authorities are key partners for our core members. Some of our members have their origins in local authorities, others have benefitted from community asset transfers or have been partners in heritage-led regeneration initiatives. In other cases the relationship has been more difficult and local authorities have shown a lack of understanding of the benefits, or exaggerated the risks, of engaging with community heritage organisations.

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<sup>1</sup> Note that we are referring to local authorities at a district or county level. Parish, town or community councils are accepted into membership on the same basis as other not-for-profit organisations.

Through our delivery of events around High Street regeneration over the past four years we have engaged with a number of local authorities. We have found that we have a unique offer to make them in terms of learning and networking around heritage led regeneration. This has been confirmed by a special meeting of local authority officers where there was enthusiasm for such a network.

**We will develop and articulate our membership offer to local authorities and seek to grow our local authority membership.**

### Businesses

The Network originally had ‘corporate supporters’ and following the 2021 review of the membership structure this became Partner (and Partner plus) membership. The main benefit of Partner membership has been seen as access to our core members so that businesses can sell their services to them.

In 2023 as part of the development phase of Essential Networks we commissioned an Events and Partnerships Contract part of which was to recruit more Partner members. This was successful and 20-25 new businesses joined the Network as a result.

A meeting of Partner members early in 2024 confirmed that there was scope for developing Partner membership as a multi-disciplinary network of heritage businesses in its own right.

Most of our current supporter members are sole-trader heritage businesses. We intend to revise the membership structure to enable them to participate as Partner members alongside other heritage businesses.

**We will develop and articulate our membership offer to businesses and seek to further grow our Partner membership.**

### Supporters

Our supporter membership consists of individuals who pay an annual fee to join the Network and students who can join for free. This section concerns the former. Supporter membership remains small at just over 30 and as stated above most of these people are sole traders running heritage consultancies of different kinds. Only a minority are simply ‘supporters’ of the Network.

Our study of comparable organisations (see Business Plan) has shown the potential to grow individual supporter members to provide a source of income (in membership fees and donations) and to grow the breadth of the Network’s influence. To do this we have to develop a distinct offer for individual supporters which, while centred on the idea that they are supporting community heritage, probably needs to include some more tangible benefits, such as access to activities at member sites.

**We will further research, develop and test our membership offer to individual supporters and if it proves feasible, seek to further grow our Supporter membership.**

## 6.4 Raise the profile of our Network

The historic emphasis on peer-network on support (a source of strength for the Network) and its relative lack of capacity meant that it could not devote time and resources to raising its profile more widely. This has held the Network back as it sought to develop and grow. Awareness of the network was low among potential members and partner organisations. We missed out on potential contracts and partnerships which we would have been in a good position to deliver.

This has begun to change but there is still a lot to do to achieve the level of recognition and awareness that we would like in the heritage sector and beyond.



The Trustees have agreed to undertake a partial rebranding, adopting the trading name 'Heritage Network'. Dropping 'Trust' from the name will remove any perception that we represent a niche within the sector and position us as a key player.

As part of Essential Network development phase we have reviewed our communications and implemented some of the easier changes such as revising our Newsletter and creating a communications plan for the year which is reviewed weekly by staff.

Historically the Network did not see itself as an advocacy organisation, and while we do not want to make this a major element of our work, preferring to work through more established organisations, we recognise that having a voice on policy matters, and participating in policy forums, raises awareness of the Network and positions us as 'at the top table'. During the development phase of Essential Networks we have recruited an England Policy Committee so that we can engage in policy and advocacy work in England (as our national committees do in the devolved nations) without a negative impact on staff time.

**We will implement our partial re-branding in the winter of 24/25.**

**We will continue to improve and develop our marketing and communications practice**

**We will advocate for the distinct needs of our members through our committees in each of the four nations.**

## 6.5 Become a more diverse and inclusive organisation at all levels

The Network has shown a strong commitment to diversity, inclusivity and access, addressing these issues in the content of its events and discussions, taking a strong position on digital and in-person access in its activity and making some progress in its governance, staff team, volunteer cohort and its choice of presenters at events. Our outreach project in 2023 engaged with a number of organisations that were ethnic-minority-led or located in deprived communities, bringing some of them into membership.

Nevertheless we represent a membership that is typical of the heritage sector as a whole in struggling to engage more diverse groups of people as customers, volunteers, staff or trustees. It is an area that we need to continue to address for ourselves and our members.

**We will continue to work to make our Network more diverse and inclusive at all levels.**

## 6.6 Build relationships and partnerships with key organisations

The Network has always had a strong partnership with Architectural Heritage Fund and in recent years has developed its partnerships with the Government heritage agencies in each of the four nations beyond their role as funders. We work closely with the National Lottery Heritage Fund to ensure our members have information and advice about funding opportunities and that we can help their work by providing support to potential applicants. We have worked with Locality, the Audience Agency, Development Trusts Scotland, Wales Co-op Centre, the Twyi Centre, Ulster Architectural Heritage and we participate in the Heritage Alliance, Historic Environment Forums in England and Scotland, Wales Heritage Group and Heritage Stakeholder Forum in Northern Ireland. Our approach to partnership is a pragmatic one, seeking opportunities to practical working arrangements for mutual benefit.

**We will continue to develop existing partnerships and seek practical ways of collaborating with other organisations to deliver our activities and aims.**

## 6.7 Become a more effective and resilient organisation.

### Digital

In the early years of the Network, Toolkit represented an important innovation by providing a knowledge bank online, replacing the previous system of a printed handbook.

From 2020-2023 the Network has gone through a huge digital transformation supported by the NLHF Unlocking the Power of Communities project. This transformation has been essential in making the Network more effective and able to cope with growth. However, due to problems with the initial commissioning of support providers, not all aspects were delivered satisfactorily.

In the development phase of Essential Networks we are carrying out a commissioning process for the next phase of digital transformation, to be completed during the delivery phase.

These developments are essential to ensure the Network can be effective and efficient while continuing to grow, to provide an excellent service to members, and the data that staff, trustees and funders require to monitor and manage performance.

### Other systems

We have continued to refine our ways of working to be efficient and effective, for example introducing a weekly review of case work to ensure that member support requests are followed up efficiently and a similar process with communications campaigns.

### Staff Team

While we are committed to remaining a lean organisation, lack of staff capacity has held us back from achieving our ambitions in several areas. We need to grow our staff team in the coming years. That means that the simple hierarchy we adopted from 2020 will not work for us and we have mapped out a new structure with a senior management team to take the organisation forward. This will be implemented as resources allow and reviewed by the trustees from time to time.

### Income

Earned income in the form of membership fees, event ticket sales, sponsorship and contracts is an important part of our income mix, but we have lacked the capacity to grow it as quickly as we would have liked. We are now seeking resources for a business development post to grow this stream of income.

However, our financial projections show that we are unlikely to reach a position where earned income will be sufficient to provide the financial resources that we need to implement this strategy. Grant funding will remain the other significant part of the mix. We will seek to consolidate our position with the Government heritage agencies in the four nations and seek grant funding from other sources in the heritage sector and beyond.

**We will develop a digital infrastructure that enables us to deliver effectively and efficiently for our members.**

**We will continue to review our practices and procedures to be as efficient and effective as possible**

**We will seek resources through earned income and grant funding to grow our staff team to provide a more comprehensive and consistent service to members. As we do this, we will implement a revised staff structure to ensure staff develop to meet the current and future needs of the organisation.**

**We will grow our earned income as set out in the business plan.**

**We will seek greater and more diverse grant income to provide the resources we need to fully implement this strategy.**