

Heritage Trust Network

Business Plan 2025-30

Short version

Note this is a shortened version (with some sensitive information removed) of the business plan prepared earlier in 2024. A few details may now be out of date.

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Introduction and scope

1 Scope

This document explains how the objectives and strategic actions in the Network’s Strategic Plan will be delivered in practice and how the Network will manage and resource the next stage of its development.

Sections 7-13 are a business development plan, dealing with those aspects of our operation where income is earned in a, more or less, open market. It seemed best to keep this within this document to show the connections and avoid repetition.

2 Governance, management, staffing

Governance

The Network is governed by a board of directors (generally referred to as ‘trustees’) consisting of twelve people drawn from members, key partner organisations and other individuals. The board meets a minimum of four times a year, once in-person. Trustees are subject to term limits of 6 years (exceptionally 9) and in recent years the Network has not found it difficult to recruit talented trustees to succeed those departing. The Chair of trustees acts as line-manager to the Chief Executive. We have a designated finance trustee who takes a special interest in Network finances and acts as approver for

payments over a certain size. There are ‘representative directors’ for each of the four nations who also sit on the national committees (often as Chair).

We have a very experienced board of trustees. Our Chair Jeremy Fenn is Head of Investment at National Lottery Heritage Fund. Michael Guy, Director of the Heritage Trust for the North West was formerly head of legal at the Heritage Fund and before that Historic England. We have experienced heritage project managers Martin Hulse from Tyne & Wear Building Preservation Trust, Alice Ullathorne from Heritage Lincolnshire, Hopwood DePree from Hopwood Hall, Alan Clarke from R-Space Gallery and Maze Long Kesh Development Corporation, Karen Chalk form Circus Eruption. Adam Hitchings is the Architectural Heritage Fund’s Wales Development Manager and a former Heritage Fund officer. Lisa Brausem is the Guidance Delivery Adviser for Historic England. Minder Kaur Athwal works in marketing, event planning, workshop facilitation and improv comedy. Fleur Elkerton is Social Media Manager for the Houses of Parliament and Emma Berry is a Partner and Advanced Level Conservation Accredited Architect at LDN Architects.

The Governance of the Network functions well. This belief is based on feedback received about governance in other organisations in the sector. We will continue to review our governance practices and learn from experts in the field and other organisations where we can. We do not anticipate having to make any major changes or to undertake a formal governance review, but this remains an option. We will ensure that as board succession continues a healthy balance of trustee backgrounds, skills and perspectives is maintained.

Staff

The Network has a small staff team led by a Chief Executive. Staff numbers vary according to funding available and reached their highest number, nine, in 2023.

We are committed to remaining a lean organisation relying on peer-learning and support and digital technology rather than a large staff team. Nevertheless, both day-to-day experience and comparisons with other organisations (see appendix A) indicates that we need a larger staff team, and we intend to work towards that. With that in mind we have agreed to put in place, to be implemented when resources allow, a staff structure which has a ‘senior management team’ of four.

We aim to provide good terms and conditions for employees and a high level of flexibility as to working arrangements. We are a Real Living Wage employer. Working for the Network has proved attractive whenever we have had vacancies to advertise, and we do not anticipate recruitment problems.

See section 5 for staff structures for delivering the plan.

Volunteers

In addition to the trustees the Network engages volunteers in its national committees. In 2024 we have added an England Policy Committee to the committees for Northern Ireland, Scotland and Wales.

From time to time, we ask our members to volunteer for particular roles within the Network such as the Network Development Group established as a focus group during the development phase of Essential Networks.

Young people undertake voluntary activities with the Network through our Youth Forum and the Digital Heroes stream of work.

We will continue to engage volunteers in the Network through our national committees and activity with young people and seek other opportunities to engage volunteers where appropriate.

Legal status

Heritage Trust Network is a company limited by guarantee registered in England. It is registered as a charity in England and Scotland.

All of the business development activity described in sections 7-15 below can be defined as ‘primary purpose trading’, so at this stage there appears to be no need to create a separate trading company. This will be kept under review by the Chief Executive and trustees and form part of the risk register. Apart from the charity law implications there may in the future be a case for insulating the charity from the risk of losses from trading activity by putting income-earning activity into a separate legal entity.

3 Financial management and performance

Network finances are managed day-to-day by the Chief Executive with support from a bookkeeping sub-contractor and the Membership Officer and using a digital bookkeeping platform. Robust financial procedures are in place with approvals for payments at appropriate levels.

The Chief Executive produces budgets for each year which are agreed by the board over the course of two or three meetings. Actual expenditure and variances against budget are reported to the board. The Chief Executive monitors cash flow and brings the situation to the attention of the board (or the Chair between meetings) if it becomes critical. Cash flow has been very healthy in recent years and the Network has built its reserves. Reserves are not quite at the level that the reserves policy requires but neither are they at a level to give cause for concern.

The table below summarises the Network’s financial performance since it was established.

	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	Projected 2023-24
Income	101,157	92,181	103,512	144,171	271,633	267,936	378,091	465,351
Expenditure	72,049	86,554	115,212	128,795	221,093	249,707	368,236	450,706
Surplus/deficit	29,108	5,627	(11,700)	15,376	50,540	18,229	9,855	14,645
Reserves	29,108	34,735	23,035	38,411	88,951	107,180	117,035	131,680

4 Markets and marketing

4.1 Markets

The markets for our activities and services can be categorised as follows:

Market	How we engage	How we will develop this market
Community organisations restoring and managing historic premises (without ‘heritage’ in their objects)	As members and event delegates Membership decisions made by leaders, event bookings by people at all levels.	Continue to grow membership from this group through outreach activity and general promotion
Single-site community heritage organisations	As members and event delegates Membership decisions made by leaders, event bookings by people at all levels.	Continue to grow membership from this group through general promotion
Multi-project heritage trusts	As members and event delegates	Growth prospects are limited, some new set ups and community development trusts but some dormant trusts that may

	Membership decisions made by senior staff, event bookings by people at all levels.	cease operation. Continue modest growth through general promotion and local authority relationships.
Parish, town or community councils.	As members and event delegates Membership decisions made by leaders, event bookings by people at all levels.	Scope for more of these that are restoring/managing historic buildings to join. Research and promote to this group to expand membership.
Businesses serving the heritage sector (established companies)	As members and event delegates and sponsors Membership and sponsorship decisions made by senior staff, event bookings by people at all levels.	Scope for growth. Business Development function will undertake specific promotion and develop our offer to this group.
Sole-traders serving the heritage sector	Currently as Supporter members and event delegates	Some scope for growth. Restructure membership categories to become a class of Partner member and promote membership.
Local authorities	Mainly as event delegates, two or three as members Membership and event booking decisions made at various levels.	Scope for growth. Invite into Network Plus membership and develop our offer to this group. Explore contract opportunities.
Individual supporters of community heritage	Currently supporter members and event delegates.	Business development function will explore ways of expanding this group and developing a specific offer for them.
Young people seeking or building careers in heritage (including Students)	Currently student members and/or members of youth forum and/or digital heroes.	Seek resources to grow all our work with young people and diversify to include more non-graduates.
Grant funders	We have continuing support from major funders in heritage field	Develop relationships with major funders and make case for on-going support. Develop relationships and seek support from wider group of funders.
Government heritage agencies (who are also funders)	Source of event bookings and contract opportunities. Decisions made at various levels.	Develop relationships and explore opportunities for contracts and partnerships through different departments.
Key partner organisations	May be sources of event bookings and project opportunities through partnership. Decisions made at various levels.	Develop relationships and explore opportunities for partnership.

4.2 Products

Heritage Trust Network is an organisation in the heritage sector primarily operating 'business to business' to provide services to organisations in the heritage and community sectors. We also operate in the community enterprise and community development space alongside organisations such as Locality, Development Trusts Association Scotland and Plunket UK.

We have features in common with a wider range of membership organisations and professional bodies, particularly those that primarily have organisations as members.

Appendix A provides an analysis of how the Network compares to similar organisations.

The existing business of the Network can be categorised as:

Membership. Information, advice and guidance, events, paid for through a membership fee, for community heritage organisations and the businesses that support them.

Ticketed events. Organisation and management of learning and networking events for staff and volunteers in community heritage organisations, staff in the businesses that support them, local authorities and students. This refers to events where revenue is via ticket sales.

Contracted events. Organisation and management of learning and networking events under contract to other organisations.

Contracted project services. Providing other services as project partners (providing line-management, sitting on steering groups and panels, etc) under contract to lead partners of projects.

Sponsorship. Providing awareness and corporate social responsibility opportunities by association with the Network and its events for businesses.

Funded project delivery. Providing project design, management and delivery services for grant funders.

We have grown our revenues in all of these areas apart from contracted events and services (see 4.3 below). Our objective is to grow our revenue in all of these areas and our strategy for achieving this in the first five is detailed in sections 7-15 below.

As far as funded project delivery is concerned, we are seeking to consolidate our position with the major heritage grant funders and seek further grant funding from smaller heritage funders and funders in other spheres such as community development and youth.

4.3 Our record

Income in recent and future years from various sources is shown below

Figures in '000s				projected	planned
	2020-21	2021-22	2022-23	2023-24	2024-25
Membership	27	30	36	42	45
Ticketed events	2	8	11	37	41
Contracted events	30	30	23	-	8
Contracted project services	1	2	7	3	3
Sponsorship	6	8	10	13	15
Total earned income	56	79	87	94	111
Funded project delivery	203	196	300	371	169
	269	275	387	465	280

Revenue in membership, events and sponsorship has grown and is projected to grow further. Contracted events and project services show a more varied pattern. In the former, we had a three-year £30,000 per year contract from Architectural Heritage Fund which ended in December 2022. This will

be partly replaced in 2024-25 by the contract with Historic England to manage Carbon Literacy training. Contracted project services are not an area that we have consciously sought to build, we have secured contracts as a byproduct of being involved in partnerships. These examples demonstrate that a revenue stream with many customers is more reliable and predictable than a revenue stream with one or two customers.

If we present this in percentage terms:

	2020-21	2021-22	2022-23	2023-24	2024-25
Membership	10%	11%	9%	9%	16%
Ticketed events	1%	3%	3%	8%	15%
Contracted events	11%	11%	6%	0%	3%
Contracted project services	0%	1%	2%	1%	1%
Sponsorship	2%	3%	3%	3%	5%
Total earned income	24%	28%	23%	20%	40%
Funded project delivery	76%	72%	77%	80%	60%
	100%	100%	100%	100%	100%

This shows that percentages are not always very helpful. Earned income percentages will leap up in 2024-25 because grant income is reduced that year in the Essential Networks interim period.

However percentages may be helpful for comparative purposes (See Appendix A).

4.4 Price

Our pricing policies seek to strike a balance between accessibility in pursuit of our charitable aims, and realism both in terms of ensuring we grow our revenues and that our pricing communicates a perception of value.

In 9.1 below we discuss how more realistic ticket pricing has resulted in higher revenues from our events and improved bookings by ensuring they are perceived as worth attending. Nevertheless our events, including Conference, remain very competitively priced.

Where we develop services under funded projects (for example our health check and structured learning programme) we will consider offering them on paid basis. This might be based on:

- Offering a certain number of free opportunities for smaller organisations and others at full cost.
- Offering opportunities on a part-subsidised basis so that there is a perception of value and commitment from the participants.

We intend to implement an overdue membership price increase in the next year (see 8.1)

Pricing for contracted activity will aim for a balance between competitiveness and ensuring that income covers the full costs of delivery and contributes to the organisation.

In grant funding applications we will ensure that full cost recovery is applied. This is calculated across the organisation based on staff allocated to each project.

4.5 Position

In the past four years the Network has moved from being perceived as a small (somewhat niche) organisation with a low level of recognition even within the heritage sector to achieving much higher

level of recognition and approval and being invited much more frequently to participate in discussions and partnerships or to contribute to forums and debates. An example is that we have now been invited to join the national Historic Environment Forum in England and selected by Historic England to be one of the providers of their carbon literacy training programme.

This process is not complete, and staff still frequently come across people who are not aware of the Network and instances where we have not been approached to be a delivery partner when we would have been the ideal organisation. We need to complete the process of re-positioning the organisation as a major player and infrastructure body within the heritage sector.

We also need to ensure we are seen as a major player in the community enterprise and community development sector alongside organisations like Locality and the other Development Trust organisations and Plunkett UK.

To do this we need to review our messaging, for example the content of our website, our social media posts, and our written material to ensure that the current and potential strengths of the Network are emphasised in terms of its impact and contribution to communities, economy, place-making and people.

Rebranding

As part of the process of completing this repositioning we have agreed to partially rebrand the organisation as ‘Heritage Network’. This does not require a change of company name as it will be a trading name of Heritage Trust Network. Dropping the ‘Trust’ will rid the Network of any vestiges of being a ‘niche’ organisation only there to serve a particular sub-set of community heritage. It will support our ambition to grow our membership and create a distinct offer for heritage businesses, local authorities and individual supporters.

4.6 Promotion

The Network has developed its promotional mix and will work to further improve the consistency and effectiveness of our marketing communications over this plan period. Our principal channels are:

Media	Uses	Plans for development
Website	Default place for people to find information about Network. Promotes membership and events and showcases member achievements.	Replacing website with re-designed and easier to use version planned for 2025
Network Hub	The Network Hub was created as an online community in the first stage of digital transformation but was not well-designed and take up has not been as great as we would have hoped. It potentially provides an opportunity of promoting events and membership benefits to members. The lack of integration with the website and Toolkit has been a problem.	Replacing with more effective member portal integrated into website in 2025.

List emails (from CRM)	Effective means of targeting promotions to members and non-members. Subscription to a list of local authority contacts for past 2 years has been effective in penetrating that market.	We will better plan and refine the way we use list emails to make them more effective, including better managing consent options.
e-Newsletters	Means of delivering member benefit of information about opportunities and promoting to a wider group of close contacts. Recently split into fortnightly newsletter for all audiences and member-only opportunities bulletin on alternate weeks.	We will further review and refine the Newsletter and promote take up of the open Newsletter by a wider audience.
Social media	Promotion to a wide variety of audiences of events and membership as well as general awareness raising.	Continue to effectively use social media.
Network events	Specific events such as our “Introduction to Heritage Network” webinars and project launch events have a specific promotional function. However all our events, online or in-person, are part of the promotion mix, providing opportunities to promote membership and events and raise the profile of the Network and its members.	Continue to use events for promotion and ensure that all events ‘cross-sell’ other products.
Face-to-face discussions	Various members of staff have face-to-face meetings with members, potential members and people from partner organisations. These are explicit or implicit opportunities for promotion.	Continue to use face-to-face meetings for promotion.
Videos	We have had videos produced and Conference (last one at Coventry 2021) which we then use to promote the Network.	More regularly produce videos that show our members in the context of their projects and explain their impact as well as promoting the Network.
Printed pieces	We use printed material sparingly because it has limited impact in a digital era and can quickly become out of date but recognise that it can be effective in some contexts, particularly providing marketing collateral at events. Recently we have produced printed: Membership brochure Member case studies Conference programmes	Carefully consider how printed material can have impact in the digital age and how printed and digital work together. Continue to use printed material where appropriate.

Partner organisation events	Attending other organisations' events as a speaker or stallholder or simply for networking can be an effective way of reaching target audiences.	Continue to assess and use opportunities for promotion through attendance at events.
Partner organisation media	We seek to raise awareness and promote events and membership either by requesting that other organisations promote them in their newsletters and other media or by placing articles in their media.	Continue to assess and use opportunities for promotion through other organisations.
Paid-for advertising	This is hardly ever used because we have not found it cost effective and well-targeted and better value options generally achieve our objectives. We occasionally pay for social media boosting but this is only useful for reaching very general audiences.	Continue to keep an open mind and review effectiveness of paid-for advertising.

4.7 Resources for marketing

Communications are at the heart of the Network's operations, promoting the work of our members and the impact of community heritage, providing information for members, publicising events, promoting the benefits of membership. In recent years we have made our communications more systematic and effective but there is still work to be done. Dedicated communications and marketing capacity would greatly facilitate this improvement. This is therefore a high priority for future development and has been included in the Essential Networks delivery phase.

5 Delivering the plan

This business plan will be delivered by the staff team, supported by the trustees and other Network volunteers and working with partner organisations.

5.1 Staff team development

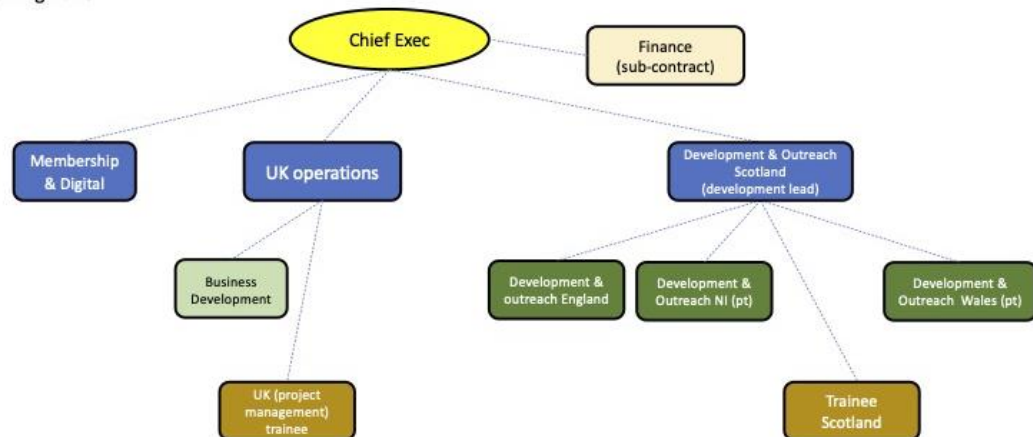
Our staff (and sub-contractor) complement as at 31st March 2024 were:

Post	Currently supported by	Changes planned	Future financial support
Chief Executive	Mainly from Historic England (plus full cost recovery and earned income)	part-time from 1/6/24	Full cost recovery and earned income
Membership Officer	Mainly from Historic England (plus full cost recovery and earned income)	Membership and Data Manager	Full cost recovery and earned income
Programme Manager	NLHF Essential Networks development phase	UK Operations Manager	NLHF Essential Networks delivery phase

Development Officer (Scotland)	Historic Environment Scotland & National Trust for Scotland	Development and Outreach Officer (Scotland)/UK development officer lead	Historic Environment Scotland & National Trust for Scotland
Heritage Trainee (Scotland)	Historic Environment Scotland	Expanded from 6-month to 12-month placement	Historic Environment Scotland
Heritage Trainee (Wales)	Cadw	To be replaced in 2025 by Development and Outreach Officer (Wales)	NLHF Essential Networks delivery phase (and Cadw)
Outreach Assistant	NLHF Essential Networks development phase	Not continuing (replaced by Development and Outreach Officer posts in 2025)	n/a
Finance function (sub-contract)	Earned income and full cost recovery	This is a new arrangement for 2024/25 to relieve pressure on Membership Officer. Will be reviewed at end of year.	Earned income and full cost recovery
Conference Organiser (sub-contract)	Conference revenues	Will review in future years and may be incorporated into post	Conference revenues

The diagram below shows a likely staff structure in 2025 if funding applications are successful.

Likely staffing 2025



Additional posts in this diagram are detailed below.

Post	Justification	Supported by
Business Development Officer	Key to unlocking greater earned income.	NLHF Essential Networks (self-financing from earned income by 2028-29)
Marketing and Communications Officer	Need to improve co-ordination and delivery of communications identified as a priority.	NLHF Essential Networks delivery phase

Development and Outreach Officer (England)	Based on identified member need and successful experience of Scotland Development Officer (2019-24) and Outreach Officer (2023) these posts working with members and partners in each of the nations are seen as priority.	Historic England
Development and Outreach Officer (part-time, Northern Ireland)		NLHF Essential Networks (with some support from Department for Communities)
Development and Outreach Officer (part-time, Wales)		NLHF Essential Networks (with some support from Cadw)
Heritage Trainee (Events)	We have successfully offered heritage traineeships (2021-24). We see a more specific post as both meeting our own need for capacity in these areas and being a more valuable trainee opportunity for people building careers in the sector.	NLHF Essential Networks delivery phase
Development Officer (young people)	We have successfully worked with young people through a number of initiatives, but this has been most successful when it has dedicated capacity.	Will seek funding
Additional business development capacity (assistant or trainee). Starting 2026-27.	As Business Development Officer delivers growth in events and other activities, they will need support with delivery.	Earned income

5.2 Digital development

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. The Network adopted other digital platforms as required with no integration: twitter, Eventbrite, Mail Chimp, Google mail/docs, Monday.

From 2020-2023 the Network has gone through a huge digital transformation supported by the NLHF Unlocking the Power of Communities project. This included:

- Adoption of Microsoft for day-to-day apps, email, cloud storage
- Development of a customer relationship management system (CRM)
- Creation of an online community (the Network Hub).
- Much more systematic use of social media
- Uptake of Zoom and Teams as platforms for online events and meetings
- Development of a YouTube channel to host event recordings
- Improvements to the website and transfer to a more sustainable hosting platform.

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. The Network Hub does not provide a well-designed modern member portal and requires separate logins from Toolkit. Eventbrite does not integrate with the CRM. Uptake of Toolkit is not as great as it could be and there are problems updating it in a timely way. The website has become outdated and difficult to edit.

In the development phase of Essential Networks we planned to resolve these issues, to commission a new website, member portal and home for Toolkit. However, it became clear that we had not budgeted sufficient funds for this and so resolved to carry out a commissioning process for the next phase of digital transformation during the development phase, to be completed during the delivery phase.

In 2025 (and perhaps the early part of 2026) we will complete this next phase of digital development including:

- Further enhancements to CRM
- Development of a new website with a member portal (including event booking system) integrated with the CRM
- Creating a new home for Toolkit
- Achieving integrations between all of the above

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.

5.3 Further ambitions

This business plan is based on a prudent assessment of financial resources that can reasonably be secured from earned income and grant funding. However our ambitions are to provide a much higher level of service to members, the wider community heritage sector and partner organisations. If we are more successful in developing earned income than projected and/or secure increased grant funding from wider range of funders we would seek to expand our services through a bigger staff team.

6 Business development

6.1 Why grow our earned income?

It is important that we grow our earned income because:

Although subject to the ups and downs of the market (for example changes in the number of potential customers and how much money they have to spend), income streams with many purchasers are relatively stable and predictable. In contrast grants, particularly large grants, can cause disruption to the organisation if they end without being replaced.

The net surpluses from earned income are not restricted in how they can be used and so give the organisation greater freedom to achieve its charitable objectives.

Grant funders will typically not fund activity 100% and a predictable level of earned income allows us to provide our own 'match funding' without having to search for further grant funders to fulfil this role.

There is an expectation from grant funders that we move towards more 'sustainable' sources of income.

6.2 Objective

Our objective is to grow our earned income revenues in absolute terms in order to make a substantial net contribution to the Network's income.

The comparisons in Appendix A show that we underperform in terms of earned income.

In 7-12 below we discuss specific objectives for areas of income.

6.3 What business are we in?

Of the product areas described in 4.2 above the following come under the scope of business development:

Membership. Information, advice and guidance, events, paid for through a membership fee, for community heritage organisations and the businesses that support them.

Ticketed events. Organisation and management of learning and networking events for staff and volunteers in community heritage organisations, staff in the businesses that support them, local authorities and students. This refers to events where revenue is via ticket sales.

Contracted events. Organisation and management of learning and networking events under contract to other organisations.

Contracted project services. Providing other services as project partners (providing line-management, sitting on steering groups and panels, etc) under contract to lead partners of projects.

Sponsorship. Providing awareness and corporate social responsibility opportunities by association with the Network and its events for businesses.

7 Ansoff matrix

The Ansoff matrix is a simple and long-standing business analysis tool that both categorises existing activity and plans and acts as a prompt for creative discussion about business development. This helps both develop and categorise business development proposals, putting them in the four quadrants.

The Ansoff matrix helps us to understand that it is easier to build on existing business (provided markets are not saturated). Quadrant 1 market penetration is least challenging because it involves selling more of what we already sell. Quadrant 2 and 3, (product development and market development) are next easiest because they build on existing strengths. Quadrant 4 (diversification) is the most difficult and perhaps requires the most investment of time and money before any returns are achieved.

	Existing products	New products
Existing markets	1 Market penetration For example: <ul style="list-style-type: none"> • Membership fees (more members from non-profit heritage orgs) • Events (more ticket sales to non-profit heritage orgs) • Sponsorship (more sponsorship from heritage businesses) • <i>Funded projects (more funding from heritage funders including govt heritage agencies)</i> 	2 Product development For example: <ul style="list-style-type: none"> • New services to existing members • Consultancy services to members • New events to existing users • New services for govt heritage agencies and funders
New markets	3 Market development For example:	4 Diversification For example

	<ul style="list-style-type: none"> • Extending membership to new groups • Providing events for new groups • Sponsorship from new types of businesses • <i>Funded projects not focussed on heritage</i> 	<ul style="list-style-type: none"> • Member services to new groups of people • Consultancy services to new types of organisations
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We have used this tool to develop the next sections of this plan, although at times the distinction between the quadrants is not absolute. We have not included the funded projects in italics in the matrix as they are not within the scope of this plan.

8 Membership

8.1 Price increases

One simple way of increasing membership income is to raise prices. Prices last increased seven years ago (in 2017) and had previously been increased five years earlier (in 2012). Start-up membership (now defunct) was increased from £30 to £50), supporter membership from £60 to £75 and Full membership (now Network) from £75 to £100. We are therefore due an increase. It makes sense that increases are only occasional and that therefore a review is scheduled very (say) four years.

Our membership categories, fees and earnings (calendar year 2023) are:

	Fee £	Total earnings £
Network	100	22,295
Network plus	250	3,500
Supporter	75	1,985
Partner	250	8,250
Partner plus	Min 1,000	5,800
Total		41,830

The timing of any price increase needs consideration. It would make the current membership brochures redundant. It would therefore make sense for it to coincide with the rebranding at which point the membership brochure would need to be reprinted anyway.

The potential downside of a price increase is that it may put some members off joining. However our prices do compare very favourably with other bodies that have organisations as members.

Locality – lowest level of paid organisation membership is £250, higher level £1,450

AIM – range is £71 to £438

Heritage Alliance – range is £205 to £1,950

Like Locality we also have a free class of membership; Connect. This has proved to be very popular and is now the biggest class of membership. The intention of initiating this membership class was to remove barriers to membership for smaller, start-up organisations and for those organisations whose ‘natural home’ was in another organisation such as Locality or AIM. A major benefit of Connect membership is that we can engage with many more community heritage organisations, and community organisations in historic sites, in pursuit of our charitable objectives. The boosting of our

headline membership numbers is impressive both for funders and businesses that want to engage with our members and are considering Partner membership.

It can be argued that we might have more Network class members if we did not have the free Connect class. We have sought to ensure that membership benefits for Connect members are minimal compared to Network class and we stress in communications, for example about events, that they could benefit from discounted/free tickets if they upgraded. We have recently started undertaking a monthly campaign, aimed at Connect members renewing the following month or two, to persuade them to upgrade.

8.2 More members

During the past four years we have taken a more systematic approach to membership growth, researching and targeting marketing at potential members. We currently have 1,344 organisations listed on our CRM as potential members. It is impossible to estimate the total potential market, but clearly it is much larger than this.

In most months we have offered “Introduction to Heritage Trust Network” online events targeted at both potential members and people in partner organisations who might refer potential members to us. The outreach project of 2023/24 showed the further potential for actively seeking out organisations that might benefit from membership.

8.3 New types of members

Partner members

The work we were able to commission in 2023 to promote Partner membership has borne fruit with 19 new Partner members joining since 1/4/23 a 73% increase. Partner membership is not new but a meeting of Partner members in January 2024 indicated an appetite for the Partner membership to become more than simply a means of accessing potential customers in the other Network members. There was a desire for a cross-disciplinary network of heritage business for the purposes of Networking, learning from each other, trading, accessing wider opportunities beyond the Network membership and advocacy. There is potential for the Network to become and be marketed as “the network for heritage businesses”. This has resource implications. Partner membership currently brings in £14,000 income, and this would need to be higher to justify the staff time required to service a business network.

Supporter members

Supporter members are our smallest membership category (33 currently) and have shown the least growth. They are made up of two types of people (not mutually exclusive); sole-trader heritage consultants who cannot justify the £250 membership fee to join as a Partner member and individual supporters of the work of the Network. The latter may include people who are involved in member organisations or potential member organisations.

These two groups may need different things. The sole-traders should really be part of our heritage business network (see above), whereas the supporters want to see that they are contributing to the work of the Network.

Many of the organisations we compared ourselves to in 1.6 above have considerable individual memberships. In the case of Historic Houses this is a membership scheme similar to National Trust, National Trust for Scotland, Cadw, English Heritage, which offers access to properties. In the case of the campaigning organisations it is an expression of support for their aims and a way of getting involved with campaigning activity. The Network does not have such compelling reasons for people

to join as supporter members. However a revived class of supporter member might be attracted to the Network by:

A compelling message that they were supporting community heritage

Information about events and activities at member sites. Members could be persuaded to offer discounts to Network supporters if it meant achieving bigger audiences.

Access to particular events such as tours of member sites, particularly if these included behind the scenes/hard hat tours not generally available.

Information about volunteering opportunities with members.

The biggest difficulty with this proposal is capacity. It would need a proportion of a staff members time to ensure that Supporter members felt suitably serviced with information and that suitable special opportunities were identified for them.

Local Authorities

Our membership has always been open to local authorities, but this has not been taken up by more than two or three at any time. These have mainly been local authorities who were in the process of creating a heritage trust for their areas. Since developing the high streets stream of events, we have engaged with many more local authority officers and a meeting of these people in January 2024 identified an appetite for a network of local authorities around the themes of heritage-led regeneration, supporting the community heritage sector, etc. Such a network would not seek to duplicate the work of IHBC or ALGAO and therefore would not focus on the technical aspects of conservation, but more on how officers can promote heritage regeneration within their authorities, and wider advocacy for regeneration practice and funding based on reuse of existing buildings, spaces and places.

8.4 Actions: membership

Action	Responsibility	Timing/priority
Develop Partner membership as a heritage business network and recruit many more partner members.	Business Development Manager	Early/high
Create sub-class of Partner membership for sole traders. Initially priced at £100, so as not to be such a big increase from £75, but after two years would be brought into line with Network class pricing.	Business Development Manager	Early/high
Develop a plan for a revived class of supporter member including membership benefits and marketing.	Business Development Manager	Early/high
Articulate our membership offer to local authorities and develop a network for local authority officers committed to heritage-led regeneration.	Business Development Manager	Early/high
Continue to systematically promote membership	Membership Manager	Ongoing
Continue to systematically promote benefits of upgrading to Connect members	Membership Manager	Ongoing
Raise membership fees (see below)	Membership Manager	1/1/25

Review membership fees again	Chief Executive/Board	2028 for raise 1/1/29
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New scale of membership fees from 1st January 2025:

	Current £	New £
Network	100	125
Network plus	250	300
Supporter	75	75
Partner (small business)		100
Partner	250	300
Partner plus	Min 1,000	Min 1,000

9 Events

9.1 More events and ticket sales

As can be seen in 4.3 above our annual event ticket sales have increased 20 times in the last four years. This has been achieved through:

More events: in particular returning to in-person events which can be priced higher.

Realistic pricing: we have learnt that, while some events may be free or low-priced for reasons of accessibility, marketing or to offer a member benefit. In general there is little price elasticity in this market and indeed events may be seen as more valuable/prestigious if they have a higher price. There are often alternative ways of ensuring access than a blanket reduction in price (e.g. through bursaries or by making a limited number of free tickets available to local community organisations). Events often take place as part of funded projects and so will be offered at free or subsidised prices. However we do not assume that all funded events should be free.

Improved promotion: using a good mix of promotional methods, including subscribing to a list of local authority contacts, and a greater frequency of messaging has ensured that we have sold more tickets.

Larger events: as we have moved back to in-person events we have not been afraid to deal with larger numbers of delegates.

In 2024, three out of the five High Street events attracted around 50 people and three recorded a surplus (for the other two we can identify why they did not). This shows the potential for this sort of event; day conferences which attract a wider audience than our core membership, including local authority officers, regeneration officers and built environment professionals.

9.2 New types of events

Learning/Networking events

The broadening of the membership (into local authorities and heritage businesses) and the success of the High Street events shows a potential for new types of events aimed at these markets and perhaps others. These could go beyond the high street theme to cover other areas of practice adjacent to the work of our members (for example local authority training around protecting buildings at risk through enforcement, CPO, Community Asset Transfers, etc).

Tours and visits

As we develop our new Supporter membership, consisting of people who are pure supporters of community heritage rather than consultants with financial interest in it, there is a need to provide this group with a membership offer that will be attractive to them. This might include study tours and visits to member sites particularly if they can offer special access such as previews and hard-hat tours.

Trade fairs

We have partnered Heritage Lincolnshire in the Heritage for the Future ‘trade fair’ event and, without competing with this event in the East Midlands, there is scope for similar events in other parts of the UK.

Training

Our business development consultants suggested more structured ‘training’ as a potentially lucrative area of business development. However, we need to consider that learning events are part of our funded services to the sector and that we are not the only organisation in the field offering free or subsidised learning. In the development stage we have piloted a structured learning programme with members, but the small cohort numbers needed to ensure quality, and the staff training budgets available to members, make it unlikely that a course of this sort would be able to make a surplus.

If learning events and programmes are aimed at our existing audience, they need to be sufficiently substantial, or of a different level of content, to justify the level of fees that would create a surplus. Alternatively we need to be aiming at a non-core audience (such as the local authorities, professionals and heritage businesses discussed above). In this market we are competing with other Networks and professional bodies, which professionals may have a greater loyalty to.

None of the above should prevent us exploring and testing opportunities for learning events and programmes that might make a surplus. One possible approach is a ‘summer school’ type event (i.e. a 2- or 3-day residential training event) which would be perceived to have a higher value for which some might pay a higher fee. It would build on our strengths in organising conferences.

9.3 Actions: events

Action	Responsibility	Timing/priority
Grow the Network’s offer of income-earning learning and networking events to core and non-core audiences	Business Development Manager with Events Officer	Early/high
Develop programme of study tours and visits primarily aimed at Supporter members	Business Development Manager with Events Officer	Early/high
Develop a programme of ‘trade fair’ type events	Business Development Manager with Events Officer	Early/high
Research the development of more formal, income-earning, training events and programmes for members and other heritage professionals	Business Development Manager	Medium

10 Sponsorship and Donations

10.1 More sponsorship

Sponsorship income has more than doubled in the last four years, but this is entirely focussed on conference sponsorship where it was the responsibility of the member of staff who organised the conference (last year a freelancer).

There is potential for much more sponsorship of both conference and other activities (for example the high streets events, newsletter, etc).

10.2 Market development: new sources of sponsorship

As we grow our activity and offer, particularly expanding the individual supporter base, it may be possible to secure sponsorship from a wider range of businesses.

10.3 Diversification: donations

With expansion of the Supporter membership there is more scope to solicit donations from these members and the general public and get closer to the levels of donation income that many organisations in the sector achieve. A strategy would need to be developed to achieve this.

10.4 Actions: sponsorship and donations

Action	Responsibility	Timing/priority
Promote sponsorship of other aspects of Network activity to Partner members and potential Partner members	Business Development Manager (co-ordinated with Conference Organiser)	Early/high
Explore scope for sponsorship from non-heritage businesses	Business Development Manager	Medium
Explore scope for developing donation income.	Business Development Manager	Medium

11 Additional member services

11.1 New services to existing members/customers

In 4.1 above we discuss whether we could develop an offer of more formal training events and programmes for members and other heritage professionals. We have also explored whether there are other services we could offer:

Consultancy

Clearly our members spend considerable amounts of money on various types of consultancy each year. Could the Network benefit from some of this spend? There are three issues:

- A lot of this is specialist consultancy that we do not have the expertise to deliver.
- We risk competing with our Partner members.
- We do not have the staff capacity to deliver consultancy services.

The business development consultants proposed some sort of consultancy brokerage services; however it was not clear how this would work in detail and how the Network would secure its fee. A combination of Partner membership and Talent Bank currently brings in income (in the form of memberships) from businesses offering consultancy services to our members.

We have also explored whether it is possible to develop specific consultancy-type products that would utilise our strengths without directly competing with Partner Members' offers. One of these was the 'strategic review', a panel-based review based on design review panels that operate in planning and the built environment. We piloted this once, which was a partial success, but surveys of members have not identified this as something they feel they need.

Legal registrations

One possible additional income-earning membership service is carrying out legal registrations when organisations are setting up or changing their legal structure. This requires some knowledge and expertise, which would have to be developed in the Network, but does not require full legal training and qualification. Indeed, it is something that non-specialist solicitors often do badly. So there may be an opportunity for a win-win where members get a better service for a lower price and the Network earns money. The Industrial Common Ownership Movement which operated from 1971 to 2001 built up a business offering legal registrations, at first for co-operatives, but later for the third sector more generally. It later merged with Co-operatives UK and the service does not seem to have continued. It is a relatively labour-intensive service and may not necessarily create surpluses for the organisation.

11.2 Actions: member services

Action	Responsibility	Timing/priority
Further research and analyse the scope for additional paid-for member services	Business Development Manager	Medium

12 Commissions and contracted services

12.1 Commissions

As detailed in 1.5 above we have previously benefitted from a commissioned learning events project from Architectural Heritage Fund. We are now also delivering Carbon Literacy training for Historic England. Proposals for this was invited in the form of a commission although it is governed by a grant agreement. In many ways the calls for digital projects put out by the Heritage Fund in recent years, and business skills projects before those, could be seen as commissions, although again framed as grants. We benefited from one of those in Digital Heroes. However, we do not currently carry out systematic reviews of portals which advertise invitations to tender.

There is scope for the Network to take on more commissioned work. There are obvious capacity challenges, but the nature of commissions carrying a fee of several thousand pounds is that they allow time for buying in additional capacity to deliver them or back-fill staff capacity.

12.2 Sub-contracted member services

As we have built up expertise and digital systems for delivering membership services there is the possibility that we could run such services on behalf of other organisations, particularly smaller organisations who cannot justify developing their own staff teams.

12.3 Consultancy services to local authorities, etc.

We may be able to offer consultancy services to local authorities, regeneration partnerships, and certain businesses, particularly in the development of new organisations as community heritage regeneration vehicles. As we have discussed above, a danger here is competing with some of our own Partner members, but there is scope for collaboration.

12.4 Actions: commissions and contracted services

Action	Responsibility	Timing/priority
Systematically scan for commissions, invitations to tender, etc and pro-actively suggest these to key organisations where possible.	Business Development Manager	Early/high
Research and scan for opportunities to deliver member services for other organisations.	Business Development Manager	Medium
Research and scan for opportunities to delivery consultancy to local authorities and others. Where these arise explore collaboration opportunities with Partner members and larger trusts	Business Development Manager	Medium

13 Capacity

As can be seen in the table in 4.3 above, we have succeeded in growing our earned income by 68% over the last four years. However, we have been held back by lack of capacity as our small staff team concentrate on delivering support to members, funded projects and managing the organisation. Staff capacity dedicated to business development would enable more of a focus on building earned income in the areas set out above. It is proposed that in the delivery phase of Essential Networks we appoint a Business Development Manager and that this post is supported for three and a half years until this activity becomes self-sustaining.

Below we summarise the tasks that will form the business development manager’s job description (collated from the tasks above)

Priority tasks:

- Develop Partner membership as a heritage business network and recruit many more partner members.
- Create sub-class of Partner membership for sole traders and promote with above.
- Develop a plan for a revived class of supporter member including membership benefits and marketing.
- Articulate our membership offer to local authorities and develop a network for local authority officers committed to heritage-led regeneration.
- Grow the Network’s offer of income-earning learning and networking events to core and non-core audiences
- Develop programme of study tours and visits primarily aimed at Supporter members
- Develop a programme of ‘trade fair’ type events
- Promote sponsorship of other aspects of Network activity to Partner members and potential Partner members
- Systematically scan for commissions, invitations to tender, etc and pro-actively suggest these to key organisations where possible.

Research and development tasks:

- Research the development of more formal, income-earning, training events and programmes for members and other heritage professionals
- Explore scope for sponsorship from non-heritage businesses
- Explore scope for sponsorship for building up donation income
- Explore scope for developing donation income.
- Further research and analyse the scope for additional paid-for member services
- Research and scan for opportunities to deliver member services for other organisations.
- Research and scan for opportunities to delivery consultancy to local authorities and others.
Where these arise explore collaboration opportunities with Partner members

This is quite a full job description, but they would be supported by the Trainee (Events) on events, the Marketing and Communications Officer, the Membership and Digital Manager on membership and the UK Operations Manager and Chief Executive generally. Where required the Development and Outreach Officers and trainees could provide the staff presence at events.