



A STRATEGY FOR STIMULATING BUILDING PRESERVATION TRUST ACTIVITY IN THE SOUTH WEST OF ENGLAND



Executive Summary

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Executive Summary

Context

The care and protection of the historic environment is of particular importance in the South West of England because of the major contribution it makes to the economy of the area. In addition to the economic benefits, its social, environmental and cultural value is a major attraction to residents, businesses and visitors and as such gives the South West its unique character. The work of Building Preservation Trusts (BPTs) makes a significant contribution to this by bringing neglected historic buildings back into use, often with new community uses.

There are over 50 active BPTs in the South West and a further 6 trusts with a national remit operate in the area. BPTs here have a strong track record in saving Buildings at Risk, with over 120 projects completed across the South West, attracting over £20 million in investment. Such projects contribute to sustainable development and raise the profile and public awareness of the historic environment in the area.

There is a 'bond' of mutual help and support between BPTs, providing more cohesion than currently seen in other areas in England. The movement is still vibrant; in addition to many that are well established, new trusts are being formed, and this study has revealed an impressive 44 projects in the pipeline. Over half of these address Buildings at Risk on the English Heritage *Heritage at Risk Register 2011*.

23 trusts operate as multi-project trusts, though few follow a traditional 'revolving fund' model; the majority (34) are effectively single project trusts. Although primarily focused on rescuing Buildings at Risk, the role and aims of BPTs in the South West has in some cases widened, and in other cases changed over time.

Many have access to paid advice, but BPTs in the South West are primarily volunteer organisations, drawing on the support of some 9,500 members, Friends and supporters. Governance and recruitment of trustees however is a key issue.

There is a disparity between trusts that are well resourced and others that have extremely limited resources, but overall the BPT movement in the South West is better resourced and benefits from a more sizeable asset base than in other areas. Some trusts though are failing to move projects forward, despite there being plenty of Buildings at Risk in need of rescue.

Based on 57 telephone interviews, from which a sample of 24 trusts was selected for further face-to-face interview, the key concerns and aspirations of BPTs to emerge are:

Issues relating to Building Preservation Trusts

Defining BPTs – a wider definition of BPTs is recommended to embrace all charitable organisations undertaking work to the rescue and rehabilitation of historic buildings at risk.

Classification of BPTs – a new cross-cutting grouping of trusts should help to provide new networking opportunities for similar trusts across the UK.

Defining and maximising success factors – the track record and experience of trusts, their 'lean' and flexible nature, and the persistence and dedication of trust volunteers are defined as key factors; these should be much more widely acknowledged and are deserving of greater levels of support.

Defining and overcoming barriers – governance, striving for a sustainable model, and lack of profile are seen as key barriers to be overcome.

Opportunities to build capacity – a thorough review of capacity demonstrates that initiatives should be targeted primarily at delivering the current project portfolio of 44 projects.

Stakeholders – there is a great deal of (immeasurable) goodwill to trusts, evidenced especially in the 9,500 supporters of the movement. A broader engagement with communities and other partners is needed, and the present savage onslaught on conservation provision in local planning authorities is a matter of grave concern.

Governance – the average age of most Boards is between 50 and 70 years old, and whilst this represents a reservoir of accumulated skills and expertise, few trusts have a recruitment strategy to ensure smooth succession planning.

Strategies & policies – many trusts lack strategies and policies as a means of ensuring both robust planning and operation, as well as providing confidence for investors.

Core funding – some trusts cover core costs through investment income, whilst trading and membership subscriptions are other important sources. Clearly most trusts struggle to build the infrastructure necessary to deliver increasingly more complex projects and reliance on local authority grant aid is highly vulnerable. The outcome regarding potential Heritage Lottery Fund grants to support capacity building in voluntary organisations is eagerly awaited as there is a lack of initiatives that directly support capacity building within trusts.

Raising profile – trusts tap into a variety of media to publicise their work, but there is consensus that much more needs to be done to celebrate this work and its achievements.

Issues relating to project delivery

Defining and maximising success factors – the sheer number of projects currently being developed, together with the clear appetite to explore new opportunities are a key finding of the study. The resilience and ability of trustees and other project personnel, lean project costs and partner support all contribute to a successful project recipe.

Defining and overcoming barriers – certain stages in the project funding cycle – for example the development stage following an options appraisal – are seen as particularly challenging where momentum tends to fade. A toolkit to progress projects and comprising strong CPO powers, fairer VAT rules and legislative ‘elbow’ is lacking, and the impact of the Localism Act on providing assistance for smaller voluntary organisations is still unclear.

Project management – tends to be located within the trusts themselves, either using staff, or more commonly, drawing on particular trustees. External consultants are often used for single building projects, raising the issue of transferability of skills, particularly as the trend has been towards single building projects and away from the ‘revolving fund’ model.

Project funding – local authority funding features in a number of projects and is clearly vulnerable in the present climate, as is investment income, another important contributor. More collaboration between principal funders and less demanding criteria would be helpful. Other funding opportunities such as community shares should be investigated.

Evaluation – measuring the impact and benefits of BPT projects has not taken place in any systematic way. This is a key area that needs addressing so that the true value of BPTs can be demonstrated to attract further investment and funding.

Transfer of skills – BPTs should be recognised as vehicles for building capacity in the community to undertake building rescue projects. Funders have their own agendas and objectives (to deliver learning opportunities, increase loan activity, address targets set by the National Heritage Protection Plan such as saving Buildings at Risk, etc). BPTs can and do deliver on all these objectives but the key issue of ensuring continuity rather than an eternal re-inventing of the wheel needs to be urgently addressed.

Conclusions

A clear route-map of the origins, development and a future path for the BPT movement in the South West has been charted, providing a realistic assessment of its strengths and weaknesses and its capacity to undertake projects. Inevitably there are constraints and limitations, but the message is clear – great things have been achieved (there is a sense that in many cases it is ‘against all the odds’) and more importantly, a great appetite exists to undertake further work. There are emerging opportunities through the asset transfer process, right to buy, neighbourhood planning and new Community Infrastructure Levy arrangements, for BPTs to embrace and benefit more extensively from the Localism agenda. To rise to these new challenges, trusts urgently require help to deliver these projects more efficiently and effectively. In particular, there is an opportunity to increase the impact of BPTs by encouraging and supporting a transition of single project trusts, or so-called revolving-fund trusts unable to move forward beyond their first project, into successful multi-project trusts where skills are transferred and knowledge is not dissipated.

Recommendation 1: Research: the UK Association of Preservation Trusts (UKAPT) should build on the data here and earlier studies to carry out further research into:

- a) optimum operational models for BPTs;
- b) the scope for establishing new trusts or amalgamating existing ones;
- c) issues of core funding including options to unlock reserves and encourage further investment.

Recommendation 2: Build capacity: UKAPT should work with partner organisations to deliver structured training and development programmes to assist BPTs to address:

- a) governance, recruitment and succession planning;
- b) provision of strategies and policies;
- c) business planning;
- d) production of marketing and communication plans;
- e) methodologies and techniques for evaluating projects.

Recommendation 3: Support: UKAPT should improve its support network by:

- a) developing the UKAPT website to include provision of member services to complement the training and development programme;
- b) delivering a mentoring programme;
- c) working with its partners to develop the role of SWAPT in the South West area.

Recommendation 4: Pilot initiatives: UKAPT should seek funding to enable it to support, monitor, and evaluate projects embarking upon the four pilot initiatives, including testing of existing guidance for asset transfer and producing new guidance for the other initiatives:

- a) community asset transfers, involving BPTs, community groups, and local authorities;
- b) affordable housing, involving partnerships between BPTs and housing associations;
- c) BPTs taking a lead role in area-based schemes, with BPTs and local authorities working together;
- d) enabling development, with BPTs working with private developers.

Recommendation 5: Other projects: Resources should be focused on completing existing projects. Where high priority Buildings at Risk are not current projects UKAPT, via SWAPT, should encourage existing BPTs to take on those projects or explore establishing new trusts.

By building on these recommendations and a successful track record in the South West, BPTs and UKAPT, working with other partners where appropriate and with essential support from funders, can play a key role in stimulating an increased number of building conservation projects.



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