

Ensuring our heritage is Fit for the Future

Lead Organisation:

Sustainability West Midlands

Project Manager: Alan Carr (Senior Sustainability Adviser)

Customers:



Project Duration:

May 2019 – on-going

The Project

The [National Lottery Heritage Fund](#) has an ambition to be better equipped to assess the sustainability credentials of applications that are submitted by their prospective grantees to obtain funding for their wide-ranging projects. These projects can include refurbishments of a preserved building to the development of an outdoor space to improve recreational use and biodiversity.

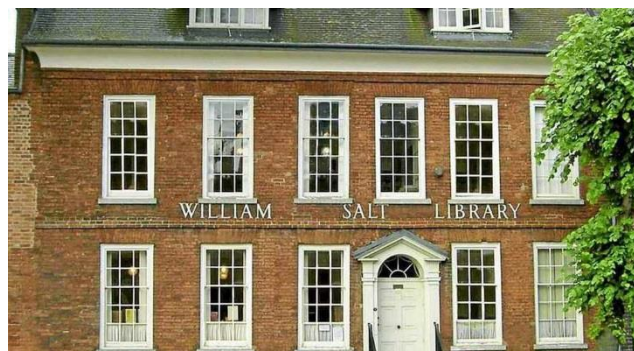
As such, the Heritage Fund approached their sustainability membership organisation, [Fit for the Future](#) (FFTF), to help them identify a suitable organisation from their membership base to help them appraise applications from across the UK for their sustainability credentials. After liaison with FFTF, SWM was commissioned to provide this appraisal and to date we have done so on two separate occasions, appraising 40 applications in total.

Aims

- Provide an overall assessment of how Grantees have responded to the Heritage Fund's environmental requirements based on a sample of projects provided.
- Highlight any examples of good or innovative best practice that can be identified.
- Highlight any issues or areas of concern for the Heritage Fund to be aware of with recommendations for action.

Challenges

Every application to the Heritage Fund is different. They can range from the delicate refurbishment of Grade I listed buildings to the regeneration of highly valuable ecological land. We could not, therefore, apply a one size fits all approach to our assessment. As



The William Salt Library in Stafford, West Midlands; one of the applicants © Express & Star

such, we were very grateful to the criteria that we had already developed for the Heritage Fund concurrent to [when we ran a series of training workshops](#) for them back in 2018. We were able to use this as a framework when assessing the applications to ensure a consistent approach and that all aspects of sustainability were covered. This ranges from ensuring energy efficiency measures are incorporated into refurbishment works, to enhancing and encouraging biodiversity, to signposting visitors to public transport options. We scored each application using a basic scoring mechanism and, as it turned out, average scores were quite low simply because there are so many facets of sustainability to consider!

Our other main challenge was the timescales in which the Heritage Fund needed the assessments completing, which are generally in line with committee meetings at which grants are approved or otherwise. We have been successful to date, but it means an intensive and rapid at-desk tour of the country’s wonderful historic assets in a short period of time! It’s a shame we can’t go and visit each one...

The Outcomes

As a result of appointing SWM in this role, many outcomes have already been realised. These include the following:

- Applications are now considered more routinely and in more detail for whether the project seeking funding will have a positive or negative impact on the environment and on sustainability.
- There is now a greater understanding of the range of actions that can strengthen an applicant’s sustainability credentials.
- The Heritage Fund has obtained independent recommendations from SWM about how the organisation can ensure future applicants consider sustainability from the outset.
- The Heritage Fund wants to work more closely with FFTF to demonstrate their commitments and good practice; with SWM being commissioned by FFTF, this fulfils this objective.
- The Heritage Fund now has a consistent approach to determining the sustainability credentials of all applications as SWM applies a consistent methodology to each assessment. This also allows for us to determine progress over time.



The front sheet of the sustainability criteria SWM uses to assess Heritage Fund grant applications.

In the Future

We understand that applying measures that benefit the environment is not always possible whilst preserving the heritage of the asset, but we hope that our recommendations and support will at least ensure sustainability is considered by each applicant from the outset on a more consistent basis. We also hope that the Heritage Fund has greater confidence that the grants it administers to successful applicants will not only minimise environmental damage but enhance the value and diversity of the local environment. We applaud the Heritage Fund for working with FFTF to ensure preserving the assets of our past are sustainable for the future.

Accolades

“At the National Lottery Heritage Fund, we recognise the huge importance of ensuring that all prospective grantees consider how their applications will benefit the environment. We worked with Fit for the Future to identify a suitable organisation from their membership base to help us assess applications for their environmental credentials and were very pleased to work with Sustainability West Midlands as a result. They provided us with a detailed overview of how well each application addresses environmental issues as well as a clear, honest and independent assessment of how each applicant could improve and how the Fund can help them to do so.” – Sue Bowers, Director of Investment, National Lottery Heritage Fund.

Contact Details

For further information on the project or to work with us in one of a variety of ways, please contact the SWM team on 0121 237 5890 or enquiries@swm.org.uk.