

Embedding sustainability into Heritage Lottery Fund operations and grant assessments

Lead Organisation:

Sustainability West Midlands

Project Manager: Alan Carr (Senior Sustainability Adviser)

Customers:



Project Duration:

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The Project

The Heritage Lottery Fund (HLF) has had 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. The first step in this process is to train HLF staff in sustainability: what it means, how to identify sustainability credentials of a project and the latest policy which underpins it. HLF recognised SWM's track record in supporting organisations in this manner and therefore commissioned us to convene a series of national workshops for staff so that they can become more knowledgeable about sustainability and therefore more confident how to assess the credentials of grantee applications.

Aims of the workshops

- Gain an understanding of the current policy context for sustainability.
- Improve understanding of what sustainability means in principle and in practice, i.e. how it might be defined and the breadth of topics and issues that it encompasses.
- Feel more confident discussing sustainability with potential applicants and stakeholders.
- Contribute to evolving thinking about how we will engage potential applicants with sustainability and support them to deliver positive outcomes.

Challenges

There are many ways that enhancing sustainability and preserving heritage can go hand in hand, but this is not always obvious from the outset. Putting solar panels onto a listed property, for example, can be a huge challenge or even an impossibility and there are many pitfalls and caveats that make it difficult for HLF staff to adequately assess how sustainable an applicant's project can realistically be. Our job was to try and make this a little clearer, albeit without the ability to change the rules, which meant SWM had to be very careful when suggesting the sort of activities that HLF staff should be looking out for. At the end of the day, preserving heritage is, in itself, a core aspect of sustainability. What was, therefore, important was to ensure that HLF staff were aware of the various facets of sustainability, many of which can be integrated into applications regardless of their heritage implications. The challenge for us was not to overwhelm the workshop delegates with too much information and too many metrics to consider, whilst at the same time showing the breadth that sustainability covers.



The delegates were all at different stages in terms of their sustainability knowledge too, so we had to pitch it right to ensure that those with a sound knowledge learnt something new and those with only a basic knowledge were well informed by the end of the workshops. The criteria that we developed for HLF (see below) was one way of doing this, so that the aforementioned breadth could be covered but in a succinct and easy-to-use way.

The Outcomes

As a result of appointing SWM in this role, we were able to provide sustainability training for HLF staff. The following achievements were realised:

- SWM produced sustainability criteria that HLF can use going forward as a framework to enable staff to better assess the sustainability credentials of funding applications going forward; this includes the more common areas of activity, such as energy and transport, but also factors in social and economic aspects too.
- We identified a series of guidance documents produced by HLF that are relevant to the sustainability agenda and have used these to feed into the above criteria, thus ensuring compatibility and continuity.
- Approximately 45 HLF staff, a sixth of the total workforce, attended the workshops from across all areas of the UK, meaning that they can now impart their new knowledge onto their teams and other staff members.
- We developed a slide pack suitable for cascading; in other words, staff who could not attend the workshops can use these as a useful 'introduction to sustainability' manual to refer back to.

- We routed out enthusiasm! The workshops showed that many HLF staff care passionately about sustainability which is always a great start. It ought to mean that the responsibility of embedding sustainability across the organisations does not have to lie at one person's door.



- We routed out knowledge! The workshops also demonstrated that many HLF staff have good ideas and a sound understanding of sustainability already, vital when moving this work onto its next stage.
- We routed out a determinism to ensure that sustainability is truly integrated into project application assessments in future.
- We have also been able to provide HLF with some light-touch recommendations to consider when taking forward their sustainability related work, in terms of re-writing new guidance and how to integrate sustainability into grant application assessments.

In the Future

We hope that the workshops and engagement that we enabled has given HLF staff more confidence when talking about sustainability, a greater understanding of its breadth and the ability to identify where grantees could factor sustainability into the applications in a more coherent manner. Ultimately, SWM is passionate about helping organisations to integrate sustainability into its operations and the great thing about working with HLF is that our intervention could have positive implications on hundreds of nationwide projects in the future. We hope that this activity kicks starts this process.

Fully integrating sustainability and doing so in a consistent manner a challenging task and one that will take time to get right, but HLF has already demonstrated good practice and enthusiasm on the agenda and we are confident they use this to their advantage, with our support.

Accolades

"HLF is fully committed to ensuring that the projects we fund take steps to reduce their negative environmental impacts and increase the positive impacts. We identified SWM as a suitable partner, based on their experience and knowledge, to help us fulfil this commitment by providing training for staff from across the UK. The aim was to increase our understanding of the various facets of sustainability so that staff are more confident talking to potential HLF applicants about the ways that they can embed sustainability within their project proposals. SWM provided an invaluable independent perspective and an enthusiastic and engaging style to enable us to kick start this process, and it was great to be able to work with them. The facilitated group work was particularly

helpful in gathering good ideas that can now be fed into our grant-making policies and emerging strategy." – Sara Crofts, Head of Historic Environment.

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.