



The Architectural
Heritage Fund

Making Projects Happen

Tessa Hilder, AHF Support Officer,
South East & East of England

Daniel Rose, AHF Support Officer,
London



What do we do?

- Charity (established 1976) with £750k; now nearly £13m in lending resources
- We provide:
 - **advice and support**
 - **small grants** for early project development
 - **loans** for acquisition/working capital
- To enable sustainable re-use of heritage buildings at risk by not-for-profit community enterprise organisations



Community organisations bring:

- Passion, commitment, drive, resilience
- Skills: professional, technical, practical
- Access to funding and finance
- Access to external agency support
- Wider community buy-in and political support



What skills do you need?



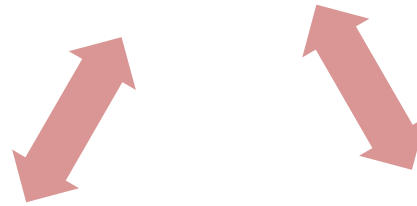


Good skills to aim for:

- **Leadership**
- **Financial**
- **Business**
- **Legal** – not-for-profit sector
- **Property** – development and management
- **Communications** – social media, community engagement
- **Administrative**
- **Fundraising** – bid development, events/community
- **Heritage** (buildings, learning, interpretation)

Getting started on your project

**Viability appraisal –
what are the options?**



Fundraising
– what are
the potential
sources of
funds?



**Business
planning** – will
the use be
financially
sustainable?





Investigating viability – key questions:

- Planning context? Heritage significance?
- Repair needs and cost?
- Potential for adaptation ↔ heritage significance. Cost?
- Possible uses (↔ adaptation)?
- Demand/market for uses? ↔ local/strategic context, consultation, comparators, competition, gaps?
- Business potential of uses: running costs/income?
- Funding sources (for delivery) ↔ fit with funder outcomes?
- **Preferred option** (based on pros and cons)



Richmond Station: Richmondshire Building Preservation Trust

Mixed-use solution for Grade II former station*



- Two-screen cinema
- Art gallery space
- Restaurant
- Café bar
- Meeting rooms
- Heritage displays
- Micro-brewery
- ‘Artisan’ food producers



Funding sources:

- **Lottery:** Heritage Lottery Fund (Heritage Grants or Heritage Enterprise), Arts Council, Big Lottery Fund.
- **Statutory:** Historic England, local authorities, S.106, London Enterprise Panel
- **Trusts and Foundations** – generally only to charities
- **Individuals** – philanthropists, community events, Crowdfunding (Gift Aid)
- **Social investment** – Community Shares (Community Benefit Societies only), loans eg AHF, Charity Bank
- **Corporate sponsorship**



Why fund your project?

- Outcomes? Will it deliver the change and impact that the funder wants to achieve?
- Strong evidence of demand/need?
- Value for money?
- Sustainability:

“Organisations who are sustainable can demonstrate effective leadership and financial management and the ability to change, adapt and reach to funding and market opportunities.”

HLF: Resilient Heritage Strength Checker





The business case – key features

- **Project** - aims, vision, details, strategic context
- **Organisation** – governance, skills/experience
- **Market appraisal** – demand, competition
- **Financial appraisal:**
 - **Income** eg visitors, sales, rental/hire, contracts (fundraising)
 - **Expenditure** eg utilities, staff costs, insurance, marketing, IT/services, stock (eg shop) maintenance
 - **Cashflow** (timing of income v. expenditure)
 - **Sensitivity analysis** – what if?
- **Risk analysis** - what if?
- **Impact** – what will change? (monitoring/evaluation)



HLF: Resilient Heritage Strength Checker – key tests

1. The organisation manages its costs within its means
2. Income is stable or growing
3. Short term income is secure
4. Financial systems are delivering good quality financial information for board and management
5. **There is over reliance on one or two people**
6. **Board is effective and strong leadership in place**
7. **Appropriate skills** in the organisation for the business activities, heritage needs, services and managing assets
8. The organisation has sufficient liquidity
9. The organisation has sufficient and stable levels of useable reserves

Finding the skills you need

- Skills audit – what do we need, what do we have, where are the gaps?
- Trustee and volunteer recruitment – prepare a role specification to cover identified gaps
- Use networks to find people who meet the need, including (free) volunteer broker services eg <https://do-it.org/opportunities/landing> , Small Charities Coalition <http://www.smallcharities.org.uk/favicon.ico>, Volunteer Centre www.enfieldva.org.uk

Developing skills

Training :

- Giving to Heritage www.theheritagealliance.org.uk/gth
- BRICKwork - mentoring <http://brick-work.org/>
- Non-heritage voluntary sector eg Voluntary Action Enfield www.enfieldva.org.uk

Memberships:

- Heritage Trusts Network – group meetings, conference, newsletter www.heritagetrustnetwork.org.uk
- Heritage Alliance – newsletter, training courses, events
- Locality: peer networks, conference, resources, funding for project visits <http://locality.org.uk/>



Bringing in professional skills

Early stage grants to commission professionals:

- AHF Project Viability Grants – up to £5,000 (max 50%)
- HLF Resilient Heritage Grants - £10,000 start-up strand
- AHF Project Development Grants – up to £25,000 (max 50% of costs)

Pro bono help:

- Lawworks: www.lawworks.org.uk/legal-advice-not-profits
- Ethical Property Foundation: www.ethicalproperty.org.uk
- Creative United: www.creativeunited.org.uk

Partnerships: Heritage Enterprise model – working with a commercial partner

Online resources

- HLF Resilient Heritage Strength Checker: www.resilientheritagechecker.org.uk
- HLF Business Plan guidance: www.hlf.org.uk/project-business-plan-guidance
- Churches Conservation Trust business planning toolkit: www.visitchurches.org.uk/what-we-do/regeneration-and-communities/tools-and-resources
- Locality building calculator: <http://locality.org.uk/our-work/assets/building-calculator/>



Contact the AHF:

Daniel Rose

AHF Support Officer for London

daniel.rose@ahfund.org.uk

