



Wales Historic Environment Group and Council for British Archaeology

Brief for Audit and Analysis of Heritage Asset Adoption Schemes, December 2021

1. About the HEG and the CBA

The Historic Environment Group (HEG) is a national forum, led by Cadw, that consists of public sector bodies and representatives of voluntary sector organisations and owners of historic sites. The Welsh Ministers established this high-level forum to take a strategic overview of issues and opportunities in the historic environment — including climate change, skills and the economic value of the historic environment — and promote common approaches to address these.

The Group comprises organisations working to sustain and promote the historic environment of Wales. Our members provide a wide range of historic environment services for people across Wales, from planning advice to townscape regeneration and from maintaining large parts of Wales's coastline and upland landscapes to opening Wales's finest castles, gardens and historic houses to the public. HEG members come from the public, private, charitable and voluntary sectors (see Appendix A for a full membership list). Together we are committed to protecting and enhancing the historic environment in sustainable ways, promoting the historic environment as a learning and training resource, developing understanding and knowledge about the historic environment, increasing public awareness and promoting community participation.

The Council for British Archaeology (CBA) is a charity working throughout the UK to give anyone the skills and opportunities to tell the stories of places and people to help us understand and connect to our world and make it a better more inclusive place. By inspiring people to explore places and engage with their environment through archaeology, we will help them make new connections with each other and the places in which they live and work. We will support more people to value diverse heritage and recognise the cultural value in everything, everywhere. We will grow the public value of archaeology by connecting commercial, academic, and community groups to demonstrate the social impact of archaeology. We are a membership organisation with around 6,000 members and provide support to the network of CBA groups in England and Wales. Our work is broad in its scope, coordinating almost 80 Young Archaeologists' Club's, helping to safeguard built heritage with Listed Building's Caseworkers in England and Wales and undertaking a wide range of advocacy and projects as well as producing *British Archaeology* magazine.

HEG recently established a Local Heritage Working group consisting of representative from some of the group's members. The group has prepared a vision for Local Heritage in Wales.

One of the subsequent actions for this working group is to identify the potential for establishing a Heritage Asset Community Adoption Scheme in Wales, along the lines of the Adopt a Monument schemes. We recognise that we will need consultancy support to understand the existing situation, analyse relevant examples and make recommendations for taking this project forward. The CBA has agreed to manage this consultancy project on behalf of HEG.

2. A Vision for Local Heritage in Wales

The lock-down imposed in response to covid-19 threw everyone onto the resources of their immediate neighbourhood. It was a powerful reminder of the value and importance of the local environment to communities. Heritage may not always be recognised as part of that environment, but it's there: everywhere has heritage that is local and personal. We want people to notice, appreciate and enjoy their heritage, whatever it is and wherever it is.

It may be in the environment, in the character of the places that surround us in our everyday lives, or the history that is hidden beneath our feet; it may be in the stories that we tell about places, and the memories they hold for us. Local heritage is about people as well as place: every single neighbourhood has been made and shaped by the people who have lived and worked there, and every place takes on meaning from the ways in which people have experienced it and related to it.

We want to focus on local heritage because we believe that it has an important role in connecting people to place, and to the community in which they live or work. We believe that engagement with local heritage can contribute to mental well-being by fostering connections between people and their communities, support physical well-being by encouraging people to explore their local area and provide multiple opportunities for enjoyment and learning.

We recognise that heritage may be encountered in many forms, and that people may express their relationship to it in many ways. This campaign is about fostering that relationship so that heritage becomes truly relevant to people wherever they are.

3. Scope of the Work

This project will research schemes in which local communities 'adopt' and care for local heritage assets. It will provide a basis of understanding with which to assess whether such schemes are an appropriate intervention for Wales now and in the future, and what type of schemes might best be delivered.

Audit and Analysis

Relevant projects / schemes may be Welsh, UK, European or Worldwide.

- Conduct a brief literature review of relevant policies, strategies, academic studies, research projects etc. In addition, identify current relevant Welsh Government objectives, programmes, strategies, funding schemes and potential partners.

- Desk based audit of suitable schemes enabling community care for heritage assets, which meet the criteria below. The contractor should identify how many schemes will be audited and what information will be gathered:
 - Community based schemes
 - Schemes geographically based in their related communities
 - Schemes with demonstrable outcomes or benefits
 - Schemes which have relevance for new schemes in Wales – either in size, geography, sessions learnt or other
 - Schemes which have engaged a diverse audience
 - Schemes which are current or past
 - Schemes which have dual benefits for the natural and historic environment should also be included but all schemes do not need to have this aspect
 - Schemes which have or could have responded to the requirements of the Well-being of Future Generations (Wales) Act 2015 and social prescribing
 - (There may be other criteria which the consultant may identify)

Where possible the audit should include: description of project and activities; timescale; quantitative and qualitative data for participants; location; ownership; funding information; partnership involvement; project management and professional input; resources used by communities; training, skills development or job creation; communications and marketing; outcomes or benefits; tools for monitoring and evaluation; budget / costs; contact details; targeted interviews. These could be presented as a searchable and reportable gazetteer, database or spreadsheet but the written report should include case studies. The implications of the Covid pandemic should also be noted both in the audit and analysis / recommendations.

- Analysis of audit and literature review with: recommendations for the implementation of future heritage adoption schemes in Wales; identification of any sites recognised as relevant for the schemes; a reflection of the resource implications for such a project; identification of any issues or barriers with suggestions for mitigation; identification of the benefits of such a project / schemes; outline project plan / steps for implementation.

Note:

- We wish 'heritage assets' to be interpreted in the broadest sense, therefore the audit of schemes may include intangible heritage such as skills, oral history, place names etc. HEG or the agency running any future scheme will not prescribe where projects might be necessary / which sites or monuments to target, instead they will naturally occur where communities are willing to develop them and for assets which are important to them.
- Where feasible and within the financial constraints of the contract, a site visit should be undertaken to review the asset's condition and any benefits arising from the scheme, especially where a project has finished – what are the long-term implications

of these schemes for the heritage / community / local environment? This would also allow for the report to be illustrated with photographs of relevant examples.

- The number of schemes to be audited is for the contractor to decide and we wish the contractor to identify the number of schemes they will be able to audit in their response to this brief.

4. Required outputs

We are looking for a consultant who will be able to produce:

- A relevant literature review
- Conclusions drawn from this
- Data based on an audit of relevant schemes which have been undertaken or are currently in progress
- An analysis of these schemes in a useable and updatable format and a written summary of the conclusions of the analysis
- Recommendations and an outline project plan for taking this initiative forward
- Suggestions for the name of this scheme

The project will provide an evidence base on which to determine whether AAM type schemes should be delivered in Wales. Initial research has shown that the benefits of AAM schemes can be substantial but that they are not universally successful.

Specifically, the project will enable HEG to determine:

- Whether AAM schemes are appropriate for Wales
- Which scheme might best deliver desired results
- What benefits we might expect to gain from such a scheme
- Increase efficiency in resource inputs

4. Timetable

The consultant should identify a suitable timetable for this contract. We require the contract to be completed by 14th March 2022.

5. Budget

The budget is £10,000, inclusive of VAT and all expenses.

(Note: the CBA is currently able to reclaim some of its VAT. If you are VAT registered, the fee would be £8810.)

6. Skills and experience required

- Experience or knowledge of best practice in approaches to working with communities
- Experience of delivering or advising on projects with a range of organisations and voluntary groups

- Experience of research and analysis of data relating to the historic environment
- Experience of developing and presenting datasets of information
- Experience or knowledge of best practice in relation to managing Welsh heritage
- Experience of developing projects which align with outcomes required by funding and strategic partners

7. How to apply

We would welcome imaginative and innovative responses to this brief. Applicants should demonstrate how they meet the above skills and experience criteria, providing the following information:

- No more than 3 pages highlighting your proposed methodology and approach, your relevant experience and how your insight could support this project. The methodology should include details of which schemes you expect to audit and the data you will gather on them.
- A CV or other summary of your relevant expertise/experience
- Full cost breakdown: Quote daily rate and expected days of work required to complete brief, VAT costs
- Contact details for two referees, who should have experience of working with you on a comparable project

Please email your application to Neil Redfern (neilredfern@archaeologyuk.org) by **12pm on Tuesday 11th January 2022**.

Shortlisted applicants will be asked to an interview via Zoom in the week **17th January 2022** please can you state your availability for interview during this week

Appendix A – HEG members

Amgueddfa Cymru – National Museum Wales • Architectural Heritage Fund (AHF) • Bwrdd Gland w[^] r Cymru | Canal & River Trust • Cadw: Welsh Government Historic Environment Service • Council for British Archaeology (CBA) • Chartered Institute for Archaeologists (CIfA) • Historic Houses • Country Land and Business Association • History Research Wales • Institute of Historic Building Conservation (IHBC) • National Lottery Heritage Fund (NLHF) • Llyfrgell Genedlaethol Cymru – National Library of Wales • National Park Authorities and AONBs • National Trust in Wales • Natural Resources Wales (NRW) • Royal Commission on the Ancient and Historical Monuments of Wales (RCAHMW) • Visit Wales: Welsh Government Tourism Department • Wales Council for Voluntary Action (WCVA) • Welsh Archaeological Trusts (WATs) • Welsh Local Government Association (WLGA) • Arts Council of Wales (as observer)

Appendix B – Scheme Examples

Pembrokeshire Coast National Park has two current schemes:

- Heritage Guardians project – started in 2018 by Delun Gibby and continued by Tomas Jones. Essentially, we have worked with a number of local schools and a special needs college to get them interested in archaeology and heritage more broadly. During lockdown we produced some videos to get a school interested in archaeology in the national park and we managed to do visits to archaeological sites and Castell Henllys before the summer break this year. An evaluation is underway to see how we take this project forward more long term.
- Safeguarding scheduled monuments; a number of volunteers were recruited during lockdown in 2020 and virtual training and one2one support was provided. The volunteers visit scheduled monuments that are accessible within the national park area and close to their home. They complete an online form, and this helps identify issues for the national park to help address. Between September and now well over a hundred visits have taken place. This also helps us monitor heritage crime issues at sites.