

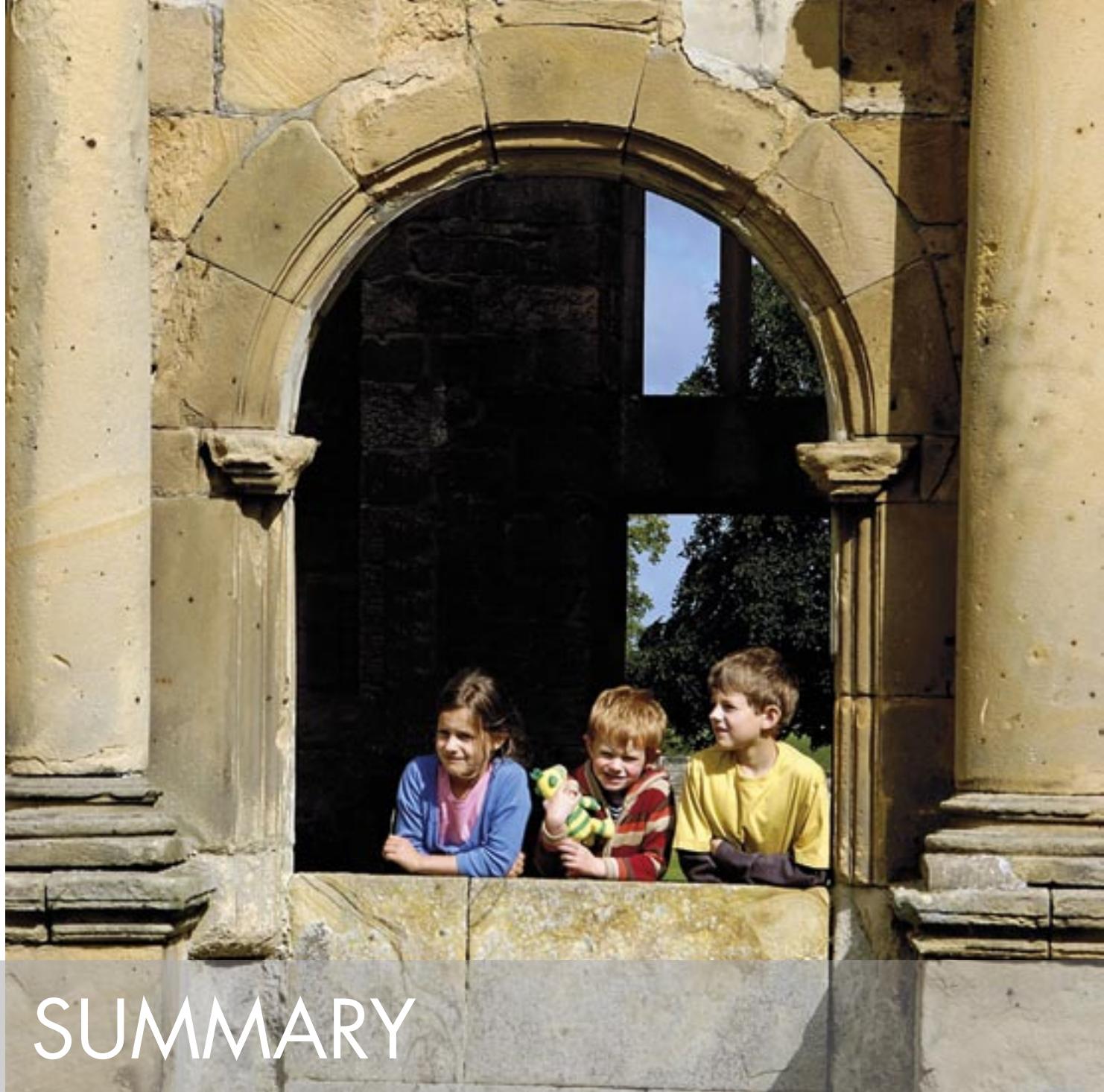


National Audit Office

Promoting Participation with the Historic Environment

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SUMMARY

1 The Department for Culture, Media and Sport (the Department) exists to improve the quality of life for all through cultural and sporting activities. One of its core policy objectives of the last five years has been to drive up participation rates, with a particular emphasis on addressing inequalities between different population groups. This report examines the effectiveness of the Department in working with English Heritage to deliver its objective of broadening participation in heritage.

2 As part of the Comprehensive Spending Review 2004, the Department agreed a target (Public Service Agreement 3) to increase by three percentage points the number of people visiting historic sites from three under-represented groups – black and minority ethnic groups, those with a limiting disability, and those in lower socio-economic groups – over the three years from 2005-06 to 2007-08. In the current spending period, from 2008-09 to 2010-11, the Department's focus on participation in heritage has changed. As part of Public Service Agreement 21, it now has a broader target to increase participation in sport and culture, including the historic environment, across the population as a whole.

3 English Heritage is the Government's statutory adviser on the historic environment, and the strategic lead for the heritage sector in England. It works in partnership with central government departments, local authorities, voluntary bodies and the private sector to conserve and enhance the historic environment, broaden public access to heritage, and increase people's understanding of the past. English Heritage has a wide range of functions including:

- making recommendations on the designation of historically important places and advising local authorities on managing change to such places through the statutory planning process;
- making grants to individuals and organisations to assist with the conservation and maintenance of historic sites; and
- acting as a custodian of last resort for over 400 historic properties and monuments, ranging from major paying attractions, to ruins which are free to the public, and properties of historic importance but limited popular appeal.

4 This report examines how effectively the Department and English Heritage have pursued Public Service Agreement 3 to increase the diversity of people participating in heritage, and considers English Heritage's role in helping to deliver the Department's contribution to Public Service Agreement 21 to increase participation more widely. We looked in detail at the performance management framework through which the Department has incentivised English Heritage to contribute to its targets on participation, and the actions English Heritage has taken in supporting the wider heritage sector and at the properties it manages. Details of our research methods are at Appendix 1.

On the effectiveness of the performance framework to deliver the Department's participation objectives

5 The Department's Public Service Agreement 3 (PSA 3) targets were challenging. Whilst the proportion of the wider population that visit historic sites is high at around 70 per cent, there are practical, psychological and cultural barriers to increasing the number of people from the target groups visiting historic sites. A particular challenge is to influence the behaviour of those people who say that they are not interested in heritage, which is a reason given by a high proportion of those who do not visit historic sites. Moreover, the Department and English Heritage have little direct influence over the wider heritage sector and have to rely on their ability to change behaviour by promoting the exchange of knowledge and good practice, and by taking opportunities to work in partnership with others.

6 Despite these challenges, the Department met its target to increase visits to designated historic sites by people from black and minority ethnic groups by three percentage points over the period 2005-06 to 2007-08. It did not do so for the other groups it prioritised, achieving a statistically significant increase of about two per cent in visits by people from lower socio-economic groups but no significant increase in visits by people with limiting disabilities.

7 The Department took the lead in delivering the PSA target for the historic environment and established a cross-sector working group, which included English Heritage, for this purpose. The performance framework agreed between the Department and English Heritage for the period 2005-06 to 2007-08 did not, however, clearly align English Heritage's priorities and objectives with the Government's commitment to broaden participation. There was a weak link between the Department's PSA target and the activities English Heritage agreed to report on, which primarily involved delivering a number of 'outreach projects' targeted at small groups of people from the priority groups. The Department measured overall performance against its target through a household survey that collected data on visits to all elements of the historic environment. It did not, however, put in place a mechanism by which the contribution of English Heritage could be judged.

8 Public Service Agreement 21 (PSA 21) covers the period from 2008-09 to 2010-11 and aims to build more active communities. The Department's contribution to this target involves increasing the number of people who participate in at least two out of five cultural and sporting activities, including visiting the historic environment. In response to recommendations from its Capability Review in 2007 the Department has adopted a risk based approach to monitoring its NDPBs which has resulted in a more streamlined funding agreement for English Heritage. The Department is continuing to discuss with English Heritage the activities it will undertake to increase participation, including its contribution to the delivery of PSA 21, and how the effectiveness of this contribution will be assessed.

9 There is also scope for English Heritage to contribute to the wider aims of PSA 21 such as promoting volunteering and giving people a greater role in decision making. English Heritage seeks to involve local communities where investment in a property is planned and delivers the majority of its outreach projects in the community, but it has not sought to build links with the communities around its properties more systematically. It also involves around 1,000 volunteers in a range of roles, but is less reliant on volunteers than charitable organisations in the heritage sector.

On English Heritage's performance in contributing to the objective of broadening participation

10 As the strategic lead for the heritage sector, English Heritage has a key role to play in delivering the Department's policy objectives. Faced with a real terms decline in revenue funding of one per cent over the last five years, coupled with an increase in responsibilities, English Heritage has focused on increasing the income it generates from its properties and growing its membership base. In 2005, it set itself a target to eliminate the deficit from opening its properties to the public, and to increase its members to one million, by March 2010. In both areas it has made significant progress. Between 2005-06 and 2008-09, it increased the revenue generated from its properties by five per cent each year in real terms, thereby reducing the deficit from opening its properties from £5 million to £2.5 million. Over the same period it increased its membership by 15 per cent from 595,000 to 687,000.

11 Although English Heritage is the strategic lead for the heritage sector, it only manages around five per cent of England's heritage sites that are open to the public. To influence the wider sector it must rely on promoting the value of heritage, spreading good practice and effective partnership working. The majority of heritage organisations feel that English Heritage could do more to engage the public with the historic environment. It is, however, effective at securing access to historic properties whose conservation it funds through its grant programme and plays an active role in facilitating debate and disseminating knowledge on broadening participation.

12 English Heritage estimates it has delivered 251 outreach projects over the three-year period (2005-06 to 2007-08), meeting the performance measures it agreed with the Department that related directly to PSA 3, though within this total longer term projects may be counted more than once in their lifecycle. It has also sponsored 'Heritage Open Days', which aims to raise awareness of heritage by opening historic buildings that are usually closed to the public and giving free access to sites that usually charge. The outreach team is valued and respected for its work by the wider heritage sector. There is little evidence, however, that project evaluations have been used to inform decision making and English Heritage has not put in place a means to evaluate the outcomes that its outreach projects or Heritage Open Days achieve in the long term.

13 English Heritage has introduced some initiatives to address barriers to visiting its properties. In 2008 it strengthened its approach to conducting access audits at its properties by evaluating both the physical and intellectual accessibility, and in 2009 it piloted diversity training for staff based at properties. Despite these positive steps, and a commitment to increase the number of visitors from priority groups to its sites over the period 2005-06 to 2007-08, English Heritage did not set a baseline or target for the diversity of visitors to its properties. The data English Heritage collected in this area was not sufficient to draw conclusions at a site level, so it was not well placed to judge the effectiveness of any strategies to broaden the diversity of its customer base.

Conclusion on value for money

14 The performance management framework agreed between the Department and English Heritage did not clearly align English Heritage's priorities and activities with the policy objective to broaden participation. In view of the significant barriers to broadening participation and the disparate nature of the heritage sector neither the Department nor English Heritage had sufficiently strong levers by which to change people's behaviour. Although the Department did establish a new method of measuring performance against its broad participation objective through the *Taking Part* survey, this was not intended to, and did not in fact, measure the effectiveness of English Heritage's contribution. While one of the Department's three participation targets was met, it is unclear to what extent the actions of the Department or English Heritage contributed to this result.

15 The drive to broaden participation came at a time when English Heritage faced a number of competing priorities, and in particular financial pressures, which have led it to a focus on maximising the revenue generated from its properties. English Heritage is respected for its outreach work, but has been poor at evaluating the long term impact of projects or of wider initiatives to broaden participation. The evidence base on which English Heritage has made decisions about how it seeks to broaden participation with the historic environment has therefore been weak, and the value for money of these initiatives cannot be determined.

Recommendations

16 On the basis of the findings set out above, the National Audit Office makes the following recommendations:

On the Department's performance management

- a** The Department delivers the majority of its policy objectives through over 60 non-departmental public bodies (NDPBs), setting out through funding agreements what the organisations are expected to deliver for the money they receive. We found that the alignment between the Department's objectives and English Heritage's targets was weak.
 - **The Department should agree with each of its NDPBs how it will measure their contribution to the delivery of the Department's Strategic Objectives and Public Service Agreements and how the cost effectiveness of that contribution will be assessed.**
- b** The Department and English Heritage have yet to agree how English Heritage's contribution to the objective of increasing participation for the period 2008-09 to 2010-11 will be assessed.
 - **The Department and English Heritage should agree clear and relevant measures with which to assess English Heritage's performance in helping to drive up participation over the period from 2008-09 to 2010-11 as a matter of urgency.**
 - **The Department should agree what each of its NDPBs is expected to deliver before funding is released.**

On English Heritage's work to promote participation

- c** English Heritage has not evaluated effectively the impact of its activities to broaden participation, and there is limited evidence that past performance is being used to inform future strategy.
 - **English Heritage should build in longitudinal evaluation at the start of initiatives to broaden participation, such as its outreach projects and Heritage Open Days. It should identify and report on both costs and outcomes.**
 - **English Heritage should benchmark the cost and impact of its outreach activities against similar work carried out by other organisations.**
 - **English Heritage should base decisions about where to direct future resources to broaden participation on analysis of the relative cost and impact of past projects.**
- d** Public Service Agreement 21 for the period 2008-09 to 2010-11 is focussed on building more cohesive, empowered and active communities. There is considerable scope for English Heritage to do more to leverage the impact it can have in pursuit of these aims.
 - **English Heritage should review successful volunteering practice across the heritage sector to identify where it could increase its impact by making more widespread use of volunteers across its activities. It should set targets to increase the contribution made by volunteers over the next five years.**
 - **English Heritage should carry out research to profile the communities local to its properties and the range of visitors each attracts. Having identified the properties with the most potential, it should then produce an action plan at each to raise the level of community engagement.**