



SUMMARY STATEMENT

*“It cannot just be dismissed because we are small. We need less funds, that is all,
but we close down if we are written off as unimportant.”*

This short snapshot survey can be taken as a fair indicator of the state of play currently and in the short to medium term as a result of lockdown during Covid-19, and is in line with other surveys and information across the independent heritage sector.

The key points are:

- Just over half of all the organisations which responded will not survive beyond one year. Some predict failure in 3 months.
- Many organisations are falling through funding nets, with some streams having only a 10% success rate.
- Distinctions between accredited and non-accredited museums are not useful in terms of their needs for funding.
- Some historic sites and buildings are being looked after by communities with significant burdens in terms of staff and overheads.
- Rebuilding is consistently a primary concern and support is being looked for to help organisations re-open with strategies, plans and resources to help them get going.

As the only sector which has no core funding and therefore no built-in resilience, community heritage is unique across the pantheon of heritage assets in Scotland. For all their ability to weather the storm in the short term (which one respondent put down to careful stewardship of resources), organisations are acutely vulnerable, and those with sites open to the public are currently facing the entire loss of their core income.

Just as with the whole heritage sector, there is a great variety in type and size of project in the community heritage sector. Some have staff, many have buildings and collections, all have activities. What is unique to the community heritage sector is that many heritage sites, and all activity-based projects, are 100% volunteer-run.

However regardless of scale, the bottom line for all museums and heritage sites is the same - once they hit a deficit that they can't reverse then closure will follow. The survival of much of the community heritage sector depends on three factors:

1. Re-opening strongly with resources and projects to re-energise and re-engage volunteers and local communities.
2. Visitors.
3. Staff and volunteers to run the sites.

Quite clearly, with government forecasts for phased lifting of lockdown and predictions around a slow resumption of tourism, this contains multiple points of failure.

Visitor numbers (many of which are international) are unlikely to be sufficient to balance out the wage costs for the staffed heritage sites. Volunteer-run sites are still paying insurance and covering bills, and also need sufficient income from tickets and donations to cover costs.

Business plans and cash flow forecasts are in disarray. The loss of Easter income alone has already been cited as a threat to the viability of some museums. In addition, the timing of lockdown means many heritage centres have spent their marketing budget for the year, with nothing left for relaunch.

It is important to note that community heritage is not only about buildings and collections, although these are currently the headlines. Across the board it is about people and activity, social inclusion and a collective care of place and community memory. Many (if not most) projects are purely activity-based and these are also suffering – but stoically, with a recognition that they just have to wait this out. Their contribution to the care of heritage, to community, and to tourism, is immense and equal but is forgotten in the scramble to save buildings, collections and staff. They deserve recognition, and they too want to rebuild and re-energise, and that will also require support.

No distinctions can be made around value of heritage. Local is never lesser, and there should not be judgements about what can be saved. Right now the preservation of Scotland's heritage within its landscape and communities is acutely at risk.

National strategies currently put communities and place-making high up the agenda. Visit Scotland has an entire authentic tourism initiative which depends heavily on community and local delivery of heritage and story. If over half the sector which primarily delivers this falls, where will the place-making and tourism agendas be then?

What is becoming crystal clear is how fragile and at arm's length, and how little understood, community and independently managed heritage is in terms of the overall heritage sector in Scotland. At the same time it is also clear what an extraordinary job communities do in caring for our places and heritage, managing a large part of Scotland's heritage tourism offer, and delivering high social impacts and economic benefits – and all at a negligible financial cost to the nation.

This survey should give pause for thought in terms of how and when resources need to be made available to this sector. The key question raised by this survey, and in comments and conversations, is what is the plan for 3 months' time when the independent sector's own resilience starts to run out, and national resilience reserves are used up?

SURVEY OUTCOMES

Purpose and target of the survey

The survey initially ran for ten days and was intended to provide a snapshot of how the community heritage sector was faring under lockdown, and how they foresaw the next few months unfolding.

It was primarily targeted at the 450+ respondents on the SCHA email database. As such, it had a 10% return, with 45 useful responses. However this is far from comprehensive – and there is no doubt that reach is currently difficult, with organisations not picking up emails and networks not working as effectively as usual.

What we knew already

The survey was primarily aimed at organisations which have buildings and collections, or other premises with overheads, which we know are the most vulnerable organisations at present. Basically this is any organisation which relies on visitor income to pay for staff costs and bills.

This does not diminish the challenge and distress for organisations and individuals who run activity projects, and who are currently struggling to see how their programmes of maintenance, repair and engagement can stay on track.

All round it is serious for community heritage organisations, whether they are facing potential closure, or long term disruption. And of course, everyone is worried about the health and wellbeing of their volunteers.

What we will do with the survey results

The results will be disseminated across the heritage and third sectors, particularly to heritage leads and funders who are keen to know how Covid-19 is affecting the independently managed sector. We will use the results to lobby on behalf of community heritage organisations.

SURVEY RESULTS

1. What kind of organisation are you?

The survey was mainly intended to capture organisations at immediate risk, which currently are those with staff and fixed costs associated with buildings.



However this list is more complex than it appears, with museum, historic building and archive sometimes all present on a single site, or in some variant of the three.

Activity-based projects accounted for 7% of the responses.

2. Do you need any advice or funding support? And if so, what?

The first question of 'Do you need any advice or funding support' drew these figures:

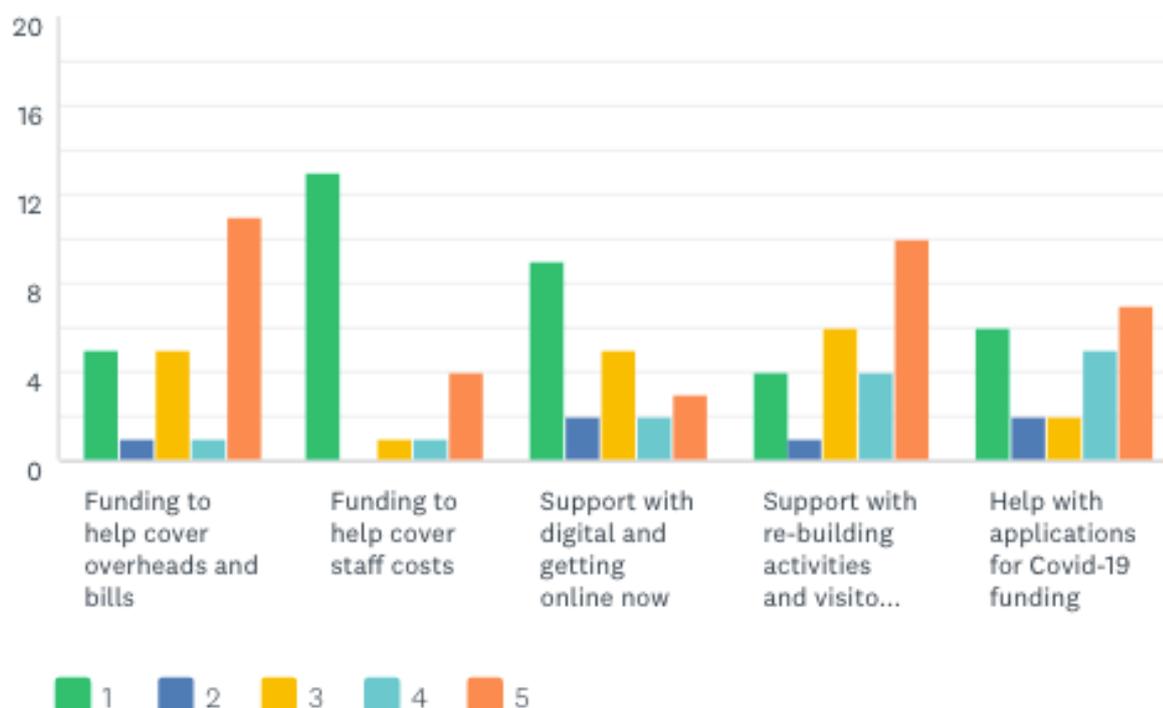
Yes 41%

No 36%

Don't know 23%

All the 'Don't know' category were unsure as to whether they were eligible or what they could apply for, and combined with those who knew they needed support – 'Yes' – accounted for over three quarters of the respondents. Of the 'No group', some had already applied, while others were mainly activity-based and were in delay mode.

The graph rated *low need* (1 in green) to *maximum need* (5 in orange) looks like this:



The main needs are:

- Support with rebuilding once lockdown is over
- Funding to cover overheads and bills
- Help with funding applications to the COVID-19 grants streams

There are some variations in the data across the different organisations. However assumptions that some sections of the independent or community heritage sector have greater needs than others – notably around buildings, collections and staff, are not borne out in the results.

The following % figures are only counted from the three highest categories of need (3- 5), so medium to high need.

Non-accredited museums:

- Support for rebuilding once lockdown ends 87%
- Help with funding applications 87%
- Fixed costs/overheads 78%
- Digital and getting online 57%
- Staff costs 12%

Accredited museums:

- Support for rebuilding once lockdown ends 87%
- Overheads and bills 83%
- Staff costs 60%

- Help with funding applications 43%
- Digital and getting online 29%

In simple terms accredited museums have more staff – and there seems to be a clear link between this and their need for less help with applications. They have more capacity to do them and are more experienced in navigating funding.

Historic sites or buildings:

- Staff costs 100%
- Support for rebuilding once lockdown ends 87%
- Overheads and bills 80%
- Digital and getting online 57%
- Help with funding applications 50%

The figures for historic buildings and sites show quite clearly that community management of the built and historic environment is a burden with real costs.

Activity based projects:

All of the activity based projects took the long view, accepting delay to activities under the lockdown but with an overlay of concern about maintaining momentum. Few were looking for support, with exception of resources to help them rebuild their engagement base when the current restrictions end. One respondent

All the data taken together, including the non-base activity projects, shows a slightly depressed set of figures for overheads and resources but mirror the trend overall.

3. Covid-19 funding

The first impression from the set of questions around eligibility, and whether organisations have applied, is one of confusion and uncertainty. This is not surprising given that all funders and sector leads have worked hard to make rapid changes to create pockets of funding, and eligibility criteria was, and remains, a moveable feast to try and reach areas of need.

The data from this section has largely served its purpose internally within SCHA to identify immediate administrative needs and to make contact with those needing assistance.

Some data is useful. At the time of sampling, around 30% had applied for funding, while nearly 70% had not. Only 7% of organisations had received funding at the time of survey (3 organisations), while 90% had not – but, to repeat, this was at an early stage in the new grant streams.

SCHA will continue to ask organisations to report back on success or otherwise with funding.

4. How long could you keep going if you don't receive help?

Interestingly this varies only marginally according to type or organisation. The most resilient group are the historic sites and buildings, which have an almost identical graph to archives.



Once 'don't know' is removed from the equation from all the data together, the result is that more than half (56%) of all organisations will not survive beyond one year if they do not receive help. These are likely to be the organisations most strongly dependent on peak season visitor income.

5. Comments

Comments are revealing across the spectrum, where people were asked "is there anything else you need help with right now".

Financial help to cover running costs is our main concern. Our annual income is mainly through donations from visitors in the summer months as we are open April to October only, and fundraisers such as coffee mornings etc. We can't fundraise at the moment although all utilities still have to be paid, electric, telephone etc

Not at the moment but maybe going into the recovery period.

We are often dismissed as unimportant and lots of small North East coastal Heritage is lost. One day it will not be authentic heritage as that will be lost through our size. Then larger organisations will mention a little and a whole heritage experience will be lost. The international connections from families who emigrated too. We have written in our constitution what should happen if we close. This shows how hard these voluntary heritage organisations work.

Some inspiration for creating digital resources with a small team of one staff member and two social media volunteers!

A clear and simple exposition of financial support activities and not just a lot of URLs.

Our income is from various donations, the community from our volunteer based fundraising events, Tourist donations and Letting out the building for Exhibitions off season. We close from November to March. Thus our income stream comes in from March to October... This pays for the annual on costs of Utilities, WIFI, licenses etc. If no income comes in then we

cannot continue. We have no paid staff that can be furloughed and therefore as everywhere is closed anyway we are on an equal platform with all museums. It cannot just be dismissed because we are small. We need less funds, that is all, but we close down if we are written off as unimportant.

We are not in dire circumstances as no doubt others are. We may just suffer the inconvenience of having the history / heritage element of our larger project pushed back a few months.

We are not eligible for support because we have enough funds to keep us afloat without income for the next 3 months at least. However, we have been working at a loss every year and our reserve funds were to be used on a redevelopment project to increase our profits and ensure our long term stability. Without these funds, our future is very unclear.

The problem is that if we cannot fundraise, we rent out our building, we cannot have community activities and tourist visits then we cannot pay our bills. Even when we reopen we are starting from a negative situation because it will take certainly until next year before we have buoyancy and robust business again.

6. Mentored support

17 organisations asked for support from the SCHA volunteer mentor team (5 people), and conversations are taking place. Thus far, the support has mainly been clarification or moral support, with a few 'buddied' funding applications.

However it is becoming clear that a significant number of the 17 organisations are not eligible for any funding for core costs. One respondent who represents a number of independent museums, spoke of rejected applications or much reduced awards (compared to requests), and in the case of one bespoke fund for the sector, the success rate was only around 10%.

Overwhelmingly, the message from the mentoring conversations is that:

- The community heritage organisations can cope for perhaps three months, but will then be approaching the cliff edge.
- Organisations are concerned that there is no current plan for when the reserves run out – and the prospects for lifeline tourism income are poor to potentially non-existent through to Easter 2021.
- Planning for rebuilding is a high priority and needs to start now, so that they can hit the ground running and start re-engaging their volunteer teams, and maximise income streams from visitors when they do re-open.

CONCLUSION

Major challenges lie ahead in the short and medium term, with the prospect of perhaps half of all community heritage sites and projects being unable to open for the 2021 season. This is a question for the whole heritage sector to consider, for the sake of communities, the heritage asset, tourism and the economy.