

Demonstrating social & economic impact: Heritage Counts

2018	Heritage in Commercial Use
2017	Conservation Areas
2016	Heritage and place branding
2015	Caring for the local historic environment
2014	The value and impact of heritage
2013	Skills in the historic environment
2012	The historic environment and resilience
2011	Big society
2010	Economic impact
2009	Sense of place
2008	Climate change

- **Annual thematic research report**
- **Regional case studies**
- Heritage Indicators
- Historic Environment Overview
- Heritage and the Economy
- Heritage and Society

The purpose of this case study is to share the approach taken by Historic England in compiling the annual Heritage Counts reports, on behalf of the Historic Environment Forum, which provide evidence for the social, economic and environmental value of the historic environment.

The research uses multiple methodologies drawn from the Treasury Green & Magenta Books which together provide guidance on the appraisal and evaluation of all policies, programmes and projects delivered using public money.

I'll provide an overview of the scope of the report and then focus on the aspect demonstrating social benefit.

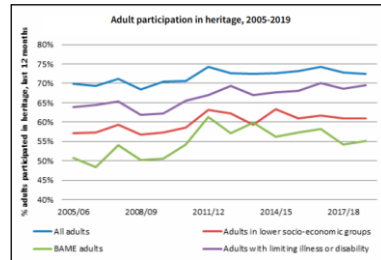
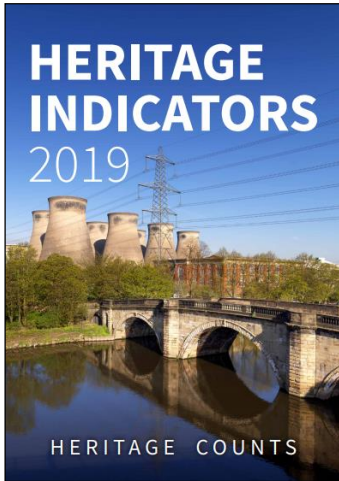
Heritage Counts is an annual cycle of reporting comprising a set of five reports:

- An **annual research report** – each year having a different theme; this years' being how reuse of historic building stock can help reduce carbon emissions, accompanied by a regional case studies

Heritage and the Economy

Heritage and Society

Heritage Counts



Capacity building

Indicator	Measurement	Value	Change
National Lottery Heritage Fund (NLHF) grants	Number of projects funded	36,296 (1994/5-2018/9)	Increase of 1,284 in 2018/19
	Total value of projects	£6,502,281,268 (1994/5-2018/9)	
Environmental Stewardship Scheme	Total value of uptake of projects	£6,419,601.68	*Scheme commenced in January 2016 Decrease of 81% since 2018
Capacity and resources	Numbers employed in the operation of historic sites and buildings (Business Register and Employment Survey)	Over 13,000 (2018)	Increase of 18% since 2008.
Developing training and skills	Number of new apprenticeships/trainees in Heritage craft skills	38,270 (2016/17)	Decrease of 5,210 (12%) since 2012/13

Historic Environment Overview – provides qualitative information on: major developments & initiatives (e.g. High Street Heritage Action Zones)

changes to the funding and resource landscape

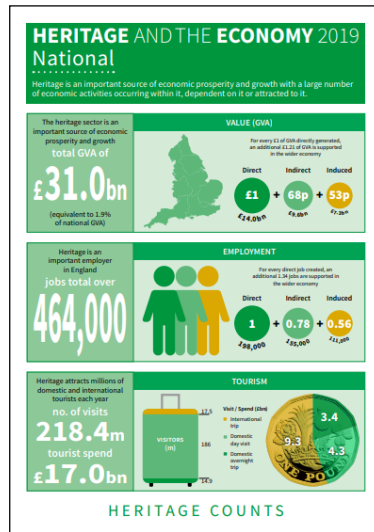
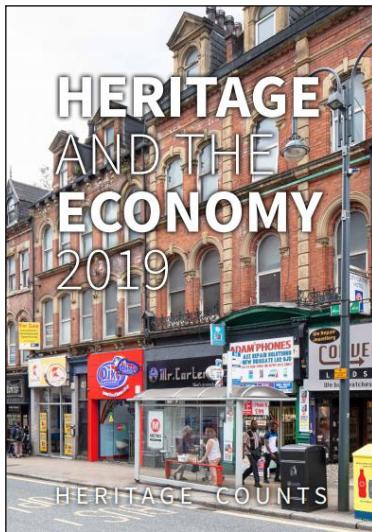
Heritage policy and management developments

national and local planning policy changes

public engagement, volunteering and events as well as the latest efforts towards building capacity within the sector

- **Heritage Indicators** – provides quantitative data on:
 - scale and scope of the historic environment and assets; designated assets
 - overall condition of the historic environment; including HAR data
 - Public engagement - participation in heritage, including volunteering;
 - Capacity Building - investments from private, public and voluntary sectors; skills and capacity
 - data from Building Preservation Trusts, local authority Heritage Champions initiative, advice for homeowners*

Demonstrating social & economic impact: Heritage Counts



Turning now to the two key reports – the value of heritage to the economy and to society.

Heritage & economy: the report examines the economic aspects of heritage conservation and presents evidence on the numerous ways that the historic environment contributes to the national economy and to local economies.

Demonstrating social & economic impact: Heritage Counts



As **individuals**, the historic environment enriches our lives. It's a source of pride and identity; it provides a deep emotional connection and a focus for shared experiences.

As a **society**, understanding our heritage helps make sense of our place in the world. It helps create a sense of familiarity and belonging, bringing communities together and connecting us to our shared past, in all its diversity.

Evidence from:

- household panel surveys
- systematic literature reviews
- bespoke evaluation studies
- public opinion surveys

This document provides the body of evidence that demonstrates the importance of heritage to individuals and communities using reliable studies that are referenced and hyperlinked for anyone seeking more detailed information. The evidence can be used by anyone who seeks to understand the social value of heritage and advocate for the historic environment.

For 2019, Heritage and society includes a more developed exploration of evidence from research for the connections between heritage and good mental and physical health. The document highlights new evidence of the positive therapeutic effects of 'green' and 'blue' spaces and historic landscapes on subjective wellbeing and happiness, and is illustrated by case studies featuring evidence and evaluation methods such as.

Key findings include:

Attitudes towards heritage and its protection are significantly positive: between 93% and 95% of Taking Part survey respondents agree that "It is important to me that heritage buildings or places are well looked after"

Visiting heritage sites is estimated to save the NHS over £193.2 million by reducing demand for GP visits and psychotherapy

Heritage landscapes and the prehistoric monuments within them are an untapped resource for developing mental health interventions and delivering programmes that can support social prescribing outcomes with community and health service

providers

Heritage & Society

Residents of Middlefield Lane in Gainsborough, Lincolnshire, taking part in community archaeological excavations on the estate. © Carenza Lewis



- research into the history and value of social housing
- generated an inspiring shared community experience
- connected residents to the history of their estate
- built social and cultural capital by engaging residents in university research and developing transferable skills (CAER 2017).
- Source:
<https://middlefielddig.sites.lincoln.ac.uk/about/>

Residents of Middlefield Lane in Gainsborough, Lincolnshire, taking part in community archaeological excavations on the estate. © Carenza Lewis

Feedback from the project showed: ?

90% of the participants rated the experience of the excavations as excellent, and that they particularly appreciated the opportunity to work collaboratively within the local community to learn something new; ?

More than 80% felt the experience had helped them develop or improve transferable skills including team working, verbal communication, working persistently, and working to set standards and interpreting evidence; ?

More widely, in excess of 800,000 listeners heard about the project through a Radio 4 broadcast in June 2017 and a hands-on exhibition about the project was featured in the national 'Being Human' festival in November 2018 at the Waterside Shopping Centre in Lincoln.

What supporting role does/can heritage science play?

- Quantitative evidence
- Qualitative evidence - case studies and...
- Identify value-added contributions
 - draws new audiences to engage with cultural heritage
 - enables diversification and wider inclusion in heritage participation

So, there is an existing framework for demonstrating the value of heritage to the economy, society and environment with indicators developed over many years.

The question for us is, can we drill into the data to make the contribution of heritage science more visible so that it can be clearly identified and evaluated?

What unique and value-added contributions can heritage science make, and is it best demonstrated through quantitative or qualitative analysis?

What methods are available for this?

We know that for measuring impact and evaluation, 'one size doesn't fit all' and that researchers need to have access to a range of options for measuring both quantitative and qualitative impact in order to align with partners' or funders' agendas and criteria; we need a toolkit.

Conceptual framework

- Appraise initiatives – Public Value Framework
- define indicators
- Evaluate initiatives

The way that we measure the economic and social value of culture varies because it is valued in distinct ways by those who use it and those that do not, as well as by different groups in society. Our choice of measurement affects whose values we capture. For this reason, arts funders have recently advocated a holistic assessment of the benefits of culture, which goes beyond the economic and cultural to encompass the wellbeing, societal and educational value of culture (Arts Council England, 2014).

The Green Book provides guidance on how publicly funded bodies should prepare and analyse proposed policies, programmes and projects to obtain the best public value and manage risks. The Magenta Book provides further guidance on methodologies for evaluation beyond economic value. These underpin the way we work at Historic England and our use of the Public Value Framework to assess all that we do.

However, there are many other ways of measuring impact and within them approaches to evaluating social value, e.g. logic models, Social Return on Investment (SROI), subjective wellbeing that we should also explore in compiling a menu of options for demonstrating the socio-economic value of heritage science.