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**RG-17-08208: EVALUATION OF OUR HLF RESILIENCE PROJECT 2018/ 2019**

**COMPARATIVE AUDIT OF OUR FIRST DECADE &**

**DETERMINING OPTIMAL WAY FORWARD**

1. **Background for the Project:**

Our comprehensive application for HLF support in 2016 for a *Prestonpans Living History Centre at the BathHouse at Prestongrange Heritage Museum,* backed by East Lothian Council, [HG-15-00182] was declined but we were given the benefit of comprehensive feedback. That critique was taken fully on board and an initial four element application for HLF Resilience support [RH-17-05105] to chart our way forward made. That too was declined in its turn with feedback directly suggesting that its Element [iv] i.e. *‘implementing the plans arising’*, represented a high risk. That element was accordingly removed and our re-application on 23rd April 2018 containing Elements [i] – [iii] only was then accepted. *‘Implementing the plans arising’* as would be identified in Element [iii] was accordingly to be addressed discretely once this now agreed Project [RG-17-08208] was evaluated.

1. **What the accepted application [RG -17- 08208] set out to achieve**:

The Trust set out to explore its optimal way forward for the next decade under the leadership of a dedicated Taskforce. It was to employ external consultants to audit the Trust’s activities and ambitions since 2006 [Element i ], and members of its own sessional staff to conduct an international comparative survey of battle and centres to identify what they had achieved - and how [Element ii ]. These reports were to provide the basis for the Trust to articulate a draft planned way forward for national and local consultation thereafter arriving at an agreed plan for the Optimal Way Forward [Element iii ].

1. **Summary of the activities carried out as Elements [i] –[iii]:**

**Element [i]** There were two strands to the external consultancy that audited the activities and ambitions of the Trust since 2006.

[a] The **Comprehensive External Audit** by Dr Stephen Connolly of DC Research Ltd [copy of report provided separately] which evaluated critically what the Trust had accomplished since 2006, initially with HLF ‘Your Heritage’ support and subsequently with myriad donations and grants - all thus far been solely with Volunteer and Sessional Staffing. He sought outside professional opinions and critically examined and debated the Trust’s stated ambitions for the coming decade not least its long held proposal for a world class Living History Centre. His report highlighted strengths and weaknesses to be addressed as will be highlighted later in this Evaluation in Next Steps section. After discussions at the Trust’s Resilience Taskforce from January 2019 onwards some short term steps were taken which included policy analyses and plans for the development of the Trust’s accumulated digital archives and further scoping of the international initiative for The Jacobite Asset Register and Trail – this latter led by Dr Michael Taylor.

[b] A discrete external **Condition & Conservation Report on the Tapestries** was also conducted by Tuula Pardoe of the Scottish Conservation Studio [copy of both reports provided separately]. She visited the tapestries on display at Cockenzie House and New Lanark Mills respectively. Dr Connolly also held an exchange of views with The Friends of the Prestonpans Tapestries.

**Element [ii] A** **Comparative Study** was conducted by Dr Arran Johnston of existing battle sites and tapestry exhibitions internationally that provided an understanding of how they functioned and what were their success factors. [copy of report provided separately]. Dr Johnston is a longstanding Sessional Staff participant in the Trust and was selected so that he personally might broaden his learning and understanding of the issues involved and build networks for the future. He reported separately to the Trustees on his personal learning throughout the studies and was mentored by Drs Stephen Connolly and Michael Taylor. Trustee Mathew Wills FCA was specifically requested to assist Dr Johnston with analyses of the capital expenditure, financial management and trading patterns as basic input to Element [iii] below in the context of NTS at Culloden and Bannockburn and the two earlier Economic Feasibility Studies for the Trust by Max Gaunt of RGA Associates [copy of Briefing provided separately].

**Element [iii] The Optimal Way Forward**  On the basis of the outcomes at [i] and [ii] above the Trustees, led by Herbert Coutts, Drs Johnston and Prestoungrange, with Drs Stephen Connolly and Michael Taylor as mentors, crafted a *Draft Manifesto* for the Next Decade. That was then shared with key groups nationally and locally in consultation; their comments being taken into account in arriving at our Agreed National Manifesto entitled **Our Vision for Victory 1745.** Of particular significance was the resolution on contextualisation and the scoping of the Living History Centre which has as its deliberate primary focus the Battle of Prestonpans in 1745. Contextualisation will play a key role in creating opportunities for repeat visits by residents within 50 miles amongst whom a strong membership database is to be accumulated. By manifestly linking with Jacobitism in the National Curriculum it is committed to achieve educational objectives. Equally important is the ambition to create integrated Living History pre/ post visits via the internet/ social media and parallel battlefield walking and interpretation. As it proceeds the Trust proposes to invite tourist trade participation in the identification and crafting of opportunities for planned tours and activities. Discussions with VisitScotland are already in hand.

The Public Consultation took place during March/ April/ May led by the Trustees and supported/ mentored by Dr Stephen Connolly of DC Research Ltd [summary of comments provided separately] which provided the final input for the nationally Agreed Manifesto - **Our Vision for Victory 1745.**

That Vision out plans to sustain and develop the accumulated work of the Trust, to create the Living History Centre by 2022/ 2023 and to manage the **Transition Phase from 2019/ 2023 -** **Taking the Path to Victory,** by professionalising the activities of the Trust and making ready for full scale launch at the Opening of the Living History Centre. It constitutes the basis for the Capital Fundraising campaign and a programme of self sustaining exhibitions and activities from the Centre that encompasses the battlefield itself where protection, conservation and interpretation continue.

1. **Evidence & Objective Analysis:**

The Trust has conducted myriad school educational activities and tours since 2006, fought off Historic Scotland and InchCape/ Chinese Offshore Energy with community backing and online petitioning to protect our battlesite within the National Inventory, taken leases from East Lothian Council on battlefield memorials, signed the battlefield in English and Gaelic, crafted a well visited Colonel Gardiner micro-museum at Bankton Doocot, sculpted new memorial tables engaging both all The Clans that Came Out with The Prince and the British Army through the good offices of Edinburgh Castle. It has acted as catalytic originator of the current Scottish narrative tapestry renaissance from its creation of The Prestonpans Tapestry in 2010 following through with its own Scottish Diaspora Tapestry. It has an enviable publications list, CDs/ DVDs and 3 APPs. It has raised over £1m since 2006 to achieve these ends.

**But the Resilience Project sought objective, robust analysis hence the External Audit** [Element i ] of what we have addressed since 2006. Dr Connolly met independently with the Friends of the Tapestries, roamed the battle re-enactment and encampment in September 2018, reviewed the online petition to protect the battle site, met Clan Chiefs there for their Parade, sought the views of national institutions and Trustees. The Scottish Conservation Studio was invited the view the Cockenzie House Exhibition of the Prestonpans Tapestry and New Lanark Mills Exhibition of the Scottish Diaspora Tapestry and give totally independent view on its condition and maintenance. The advices received, which endorsed those previously from Bayeux and Reading, will continue to be most deliberately followed in our Living History Centre.

Dr Arran Johnston’s **Comparative Study** [Element ii] of success factors at battle sites, because of the small numbers extant, was a virtual census and in doing so he was also able to build and extend his learning and network for future sharing. However many contacts were made, and analysis undertaken, no matter how objective and robust, that could never be sufficient since the experiences offered are dynamic, continually responding to visitor needs – hence the value of building the network e.g. at a time when Falkirk and Naseby are both creating their own centres and Richard III in Leicester and the NTS at Bannockburn and Culloden are making progress with major new facilities.

1. **Understanding & Improvement**

The entire Resilience Project was designed to heighten the Trust’s understanding and that of our communities locally, peers internationally and thousands of stitchers in 34 countries across the globe. Not only have we sought their views and opinions ab initio, we have incorporated them into our Draft Manifesto and taken them out again for public critique. The Agreed National Manifesto we have arrived at and are now vigorously pursuing is based on that broadly based understanding not just of the heritage we are determined to share to enrich our community’s sense of place but vitally on how a Living History Centre can operate on a self-sustaining basis. It is being widely published and has received extensive press and social media coverage.

By internalising the Comparative Study with our own Sessional Staff we have built a stronger network with other professionals in these areas way beyond that already gained through our myriad activities not least at 90+ exhibitions of our tapestries across the UK, Norway, The Netherlands, France [e.g. Paris, St Nazaire and Bayeux], Italy [including twin town Barga], Australia, New Zealand, Canada, USA and Iceland with some 750,000 visitors to date. And within this framework we also saw the 4 year Evaluation of the Scottish Diaspora Tapestry sponsored by the University of the West of Scotland for that same Sessional Staffer’s doctoral studies – *What Wouldn’t We Do for Scotland?*

Yet many of these Improvements we envision have yet to be fully realised. That was always going to be the outcome. HLF declined to support Element [iv] of our original application. Now, we are determined to Step Up.

**6. OUTCOMES ANALYSIS**

**6.1 Outcomes for Heritage – In better condition:** The study by the Scottish Conservation Studio has identified the requirements for the maintenance and preparation for exhibition of both Tapestries; a campaign was launched to acquire/ lease the battlefield for better interpretation and return to cropping pursued under Community Engagement Act 2015 to complement the leases already held on Bankton Doocot, Gardiner’s Obelisk and the Battle Bing.

**Heritage identified and better explained:** During the Resilience Project the evaluative study of the Scottish Diaspora Tapestry was published; the largest ever encampment and re-enactments and Clan Parade was presented for 2,500+ visitors over the anniversary weekend in September 2018; two new Memorial Tables were installed on the 1722 Waggonway recording the Clans and Regiments that fought at the battle; school visits were conducted and primary schools engaged in the creation of banners for the Parade; Clan Chiefs were guests in September 2018 and their Clan involvement in 1745 was described and shared at exhibition nights prior to the re-enactment; Clan eponymous streets were informed of their relevant Clan involvement and invited to meet the Chiefs; Lord Lieutenant, Governor of Edinburgh Castle and Provost of East Lothian were guests at the Parade. The External Audit and Comparative Study have also been made publicly available together with the Trust’s Policy Papers.

**6.2 Outcomes for People - People will have developed their skills:** Whilst no formal qualifications were achieved directly from the Project, the Trustees, Sessional Staff and Volunteers have been deeply engaged in addressing the issues raised by HLF in its critique of the Trust’s BathHouse Project in 2017 [HG-15-00182]. This focussed on the forecasting and financial budgeting required for the Agreed Manifesto and the Path to Victory during the Transition Phase to come. Volunteers developed skills as stewards for the re-enactment and Parade and as presenters and lecturers for tapestry exhibitions and schools. Skill development in the use of social media for the tapestries and the battle re-enactments were considerable including Friends groups for tours and exhibitions of the Tapestries across Scotland.

**A wider range of people will be involved with heritage:** The Project broadened an already well apparent ‘wide range’ involved through the tapestries and previous re-enactments, school and tourist visits. Media reach for the 2018 Parade and re-enactments was 14.7 million + 2500 attendance and for the Consultation media reach of 5.2 million. Liaison was arranged with the 1722 Waggonway Heritage Group that traverses the battlefield with mutual engagement for walks/ tours and at the re-enactments with their replica waggon. Very importantly, the process of External Audit, Comparative Study and the consultations on the Agreed Manifesto engaged Community Councils and professional groups in our heritage and greatly heightened their understanding as evidenced in their feedback.

**6.3 Outcomes for Communities – Your local economy is boosted:** This was most especially so at the time of the major Parade, encampment, re-enactment in September 2018 where local traders provide food and refreshment. Accommodation benefits also occur but there is only modest provision locally because of the proximity to Edinburgh. However these same benefits apply year round for walking groups along the neighbouring John Muir Trail and tourist groups brought to the battlefield. The envisaged establishment of the Living History Centre will boost employment as well as purchases by visitors.

**Local area/ community will be a better place to live:** Prestonpans and its neighbours are currently in the process of doubling the size of the population, with incomers as yet having little understanding of the heritage. Well presented heritage provides and reinforces a sense of place, so necessary for uniting a changing community. By working with Clan eponymous street residents an important start in this direction was made. Strongly positive feedback was also given by the community after the Parade, encampment and re-enactments as well as the tapestry exhibitions across Scotland. Awareness of Prestonpans as an attractive place to live has been heightened locally and via the media reach.

**Your organisation will be more resilient:** This was the main purpose of the Project. By focusing on Elements [i] – [iii] the Trust has addressed the critique offered in 2017 by HLF and developed a robust, community endorsed and nationally agreed **Path to Victory** **2019-2023** taking the Trust through a professionally led Transition Phase 2019/ 2023. We have a coherent vision and strong sense of strategic direction. We are substantially more resilient (see the list in the next paragraph for actions already undertaken or in progress) and ever more determined to advance. The Project was, as HLF recommended and understood in making the grant, but the first step. We have now identified the pattern for our Transition Phase to carry us forward in the direction agreed. We remain totally committed to creating a ‘world class facility’ which our studies and comparisons have shown is necessary for trading sustainability.

We have further elucidated our Objects as suggested by DC Research; we are recruiting a broader range of Trustees to ensure succession planning and to improve the capacity of our governance for the path ahead; we are reinforcing and clarifying our much appreciated relationship with the Scottish Battlefields Trust; we are in the final stages of discussions to select the location of the Living History Centre so that we can begin our campaign to raise capex funding; we are giving greater clarity and focus to The Friends of the Tapestries and to Friends at large for the battlefield making ever growing use of social media; we continue campaigning for the proper conservation of the battlefield; we are expanding our relationships with NTS, HES and the Scottish Government and other heritage partners not least through the Jacobite Asset Register and Trail; and last but not least we have scoped and programmed the activities of the Living History Centre and its core visitor experience to ensure repeat visits from near neighbours as families and groups, and continued support from the national and international tourist trade and the nation’s schools.

**7. Conclusions & Next Steps**

**Our Challenge is to Step Up to fulltime Professional Leadership forthwith.** The Trust is absolutely clear that its **Vision for Victory 1745** cannot be achieved on the basis that it has conducted its affairs since 2006. Volunteers and Sessional Staffs must always have a vital role to play but the Vision requires professional fulltime leadership not only to sustain and develop what has already been achieved but to accomplish all that is necessary to establish a successful Living History Centre in Prestonpans by 2022/23. Accordingly the Trust will be seeking further Transitional/ Implementation funding from National Lottery’s Heritage Fund alongside the Trust’s own in-kind and ‘Restricted Donations’ Fund of £100,00 and other potential supporters identified.

The Trust approach, **Taking the** **Path to Victory 2019/ 2023** is set out in the attached document of that title. This provides the basis for our forthcoming Project Enquiry to the National Lottery Heritage Fund and to other potential donors.

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*The Public Consultation, which has been conducted and captured as this Project Evaluation is now concluded, will remain open for further comments until June 30th 2019.*