Prepared for: **AHF Scotland**

Evaluation of AHF Scotland Programmes: Transforming Scotland's communities and places through heritage-led sustainable regeneration (2018-2023)

RF Associates

23 July 2024

Final Report

CONTENTS

Evaluation objectives

- Architectural Heritage Fund (AHF) commissioned RF Associates to review its performance against the aims and objectives of its grants and loan programmes in Scotland from 2018-2023, which are funded by Historic Environment Scotland, the William Grant Foundation, and and as part of the UK wide Heritage Development Trusts initiative, the National Lottery Heritage Fund.
- This was intended to be a means of evaluating AHF's delivery of the programme, reporting and quantifying the successes, and building on learning for the delivery of future programmes.
- The long-term nature of heritage regeneration projects, coupled with AHF's often early-stage interventions, means many of the outputs and impacts of its grants are only realised many years after the interventions.
- AHF was keen, however, to gain an independent evaluation of the more direct and immediate impacts of its intervention in projects in helping them to progress. It was interested in both what its funding enables and also in quantifying the value of its non-financial support – in particular, its advice to grant recipients, as well as its role contributing to the wider Scottish 'ecosystem' of support to regeneration and heritage projects.
- Following commissioning, we agreed specific questions to report against:

Key research and evaluation questions:

- What is AHF's role in Scotland?
- What activities has AHF delivered between 01 April 2019 and 31 March 2024 in Scotland?
- How has AHF delivered this activity, what resources has it used to do so?
- How adequately does AHF meet demand for financial support in Scotland?
- What type of organisations have been impacted by AHF activity in Scotland?
- What has AHF delivered in Scotland against the HES outcomes / KPIs?
- What has AHF delivered in Scotland against the AHF TOC impacts?
- What is unique about how AHF delivers its work compared to other funders in Scotland?
- What have been the main impacts identified by beneficiaries of AHF activity in Scotland?
- What do stakeholders and beneficiaries consider have been the main impacts of AHF's work in Scotland?
- What do stakeholders think would happen to historic buildings if AHF was not providing funding in Scotland?
- How do stakeholders think that AHF's work will meet the needs of Scotland's national Historic Environment Strategy?

Evaluation approach and method: overview

- Following commissioning, we revised our approach to focus more on qualitative research than quantitative research
- The table summarises the activities undertaken, and the days allocated for each activity at the outset
- NB Beyond the 10.25 days allocated, additional time of approx. 6-7 days was spent by RF Associates on delivering this.

Project activities	Days allocated
Project initiation meeting	0.25
Review of all background material and data held by AHF	1
Development of qualitative guide / 7 telephone or zoom interviews with key stakeholders (30 mins each)	1
Analysis of qualitative research	1
Analysis of 300 open ended responses in satisfaction questionnaire	2
7 telephone or zoom interviews with key beneficiaries (30 mins each)	1
Analysis	2
Reporting	2
TOTAL	10.25

Evaluation approach and method: qualitative research interviews and analysis

Stakeholder qualitative research

- RFA conducted 7 telephone / Zoom depth interviews with 8 key stakeholders (one paired depth interview) using a discussion guide agreed with AHF
- AHF provided a list of stakeholders
- AHF sent introductory emails to stakeholders and RFA followed up with these to arrange a time for the interviews
- Interviews were conducted between 22 and 29 April 2024 and audio recorded, they were then transcribed
- Interview data was then analysed thematically
- Anonymous stakeholder verbatim is provided in this report, AHF does not know the specifics of who was spoken to; they remain anonymous to ensure a confidential / honest response

Beneficiary qualitative research

- RFA conducted 7 telephone / Zoom depth interviews with key project leads from 7 beneficiary projects using a discussion guide agreed with AHF
- AHF provided a long list of 28 beneficiary projects and sent introductory emails to these projects
- RFA devised a sample to achieve a spread of projects and then followed up with contacts to arrange a time for the interviews
- Sample included:
  - 3 town, 2 rural, 1 city, 1 island
  - Geographical spread across Scotland
  - 2 projects had received loans as well as grants
  - Number of grants ranged from projects with 1 grant to multiple grants across multiple projects
- Interviews were conducted between 19 May and 3 July 2024 and audio recorded, they were then transcribed
- Interview data was then analysed thematically
- Anonymous beneficiary verbatim is provided in this report, AHF does not know the specifics of who was spoken to; they remain anonymous to ensure a confidential / honest response

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Evaluation approach and method: beneficiary exit survey data analysis

- RFA analysed Scotland programme data from 23 March 2020 to 11 March 2024
- All Project Viability Grant (PVG) and Project Development Grant (PDG) completed an exit survey in which they were asked to explain their reasons for their satisfaction with AHF
- 191 projects provided answers to this question: PDG n=109 , PVG n=82
- We qualitatively analysed these responses to identify:
  - The main factors driving satisfaction
  - The extent to which grant beneficiaries felt that AHF involvement had helped them to leverage additional funds for their projects
  - The counter-factual: what did projects perceive would have been the impact on their project if AHF had not provided them with grants and support
  - A general sense of what beneficiaries think might happen to historic buildings if AHF was not providing funding in Scotland

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1. Executive summary

Executive summary (1 of 3)

1. The AHF provides grants, loans and other non-financial elements of support for community-led heritage regeneration projects. Grants are designed to help with early-stage costs as groups explore the feasibility of re-using redundant historic buildings and undertake project development work, in readiness for a capital project.
2. During April 2019 to March 2024 AHF offered **£2.2M** of grant funding in Scotland, to a total of **193** different non-profit organisations, supporting **201** different built heritage regeneration projects, and made loan offers totalling more than **£3M** to 15 organisations.
3. Demand for support in Scotland is high compared to other parts of the UK, outstripping the funds that AHF can provide. 61% of applicants were offered funding during April 2019 to March 2024 and 54% of grant offers made during this time were to 'new' organisations who had not previously applied for AHF funding relating to a historic building regeneration project.
4. AHF is small but mighty; despite having only two staff members in Scotland, its work reaches across Scotland supporting projects many of which have varied end uses. For example, around one third (35%) of projects are on the Scottish Buildings at Risk Register, around one third of projects are in each of cities, towns, and more rural or island locations and just over two thirds (68%) are in areas of deprivation (Scottish Index of Multiple Deprivation).
5. AHF funded by Historic Environment Scotland, the William Grant Foundation, and the National Lottery Heritage Fund, exceeded all 10 HES targets in 2023-24 and fully achieved all but 2 in 2022-23, delivering impact in Scotland in relation to the three key themes of Heritage and Society, Heritage and Environment, and Heritage and Economy.
6. Stakeholders were very positive about the work of AHF in Scotland and the impact that it has as an organisation. They considered that the organisation plays a significant role in the sector in addition to its role at an individual project level. Beneficiaries were also very positive about the role played by AHF. They considered that the organisation provides important early-stage funding that can be difficult to achieve, facilitating project development, offering expert guidance, helping projects to leverage additional funds from other funders, and ultimately contributing significantly to beneficiaries' projects to restore and repurpose old buildings to benefit local communities.
7. Stakeholders and beneficiaries had different perspectives on the distinctiveness of AHF in comparison with other funders in Scotland, however the main areas of agreement were that as an organisation AHF provides early-stage funding which enables projects to develop and leverage funding from other sources; that AHF is an approachable and supportive funder, that it is flexible and understanding.

Executive summary (2 of 3)

8. Beneficiaries considered that AHF has a substantial impact considering that its grant funding amounts were limited. They emphasised AHF's role as a catalyst or enabler in providing funding that helps other things to happen, as well as playing an important role in preventing financial crisis for some.
9. Stakeholders saw the involvement of AHF in projects acting as a reassurance or 'seal of approval' for larger funders. They saw AHF as playing an important role in building a pipeline of projects across the sector, which other funders can then respond to. They also considered that AHF's involvement has an impact on communities right across Scotland. Given AHF's early-stage involvement the impact from the longer-term impact of projects was difficult to attribute solely to AHF.
10. In terms of the draft AHF Theory of Change, AHF is considered to deliver the following **outcomes**:
    - **Increased confidence**: some beneficiaries talked about being more confident in their ability to lead and sustain their projects. Stakeholders talked broadly about AHF's funding and support providing communities with the confidence to move forward with projects. They felt that AHF provides useful expertise, especially for those who may have enthusiasm but lack specific knowledge about heritage buildings or listed properties. This enables them to receive professional support which helps them to develop their skills and knowledge to lead and sustain projects.
    - **Improved financial resilience and sustainability**: Beneficiaries considered that their projects had become more financially resilient and sustainable due to early support from AHF, emergency support and additional support via additional grants or loans, which enabled them to access other funding and continue developing projects. Stakeholders also considered that AHF's grants and loan funding helped projects to bridge financial gaps and that early support often led to further investment from other funders. They perceived that AHF's often long-term commitment to communities and organisations, providing ongoing support, advice, and additional grant/loan funding, helped projects remain viable and resilient during challenges.
    - **Ability to leverage other funding**: Beneficiaries from community-led projects have benefited from AHF funding and advice which enabled them to leverage other funding sources. Stakeholders considered that AHF was often the catalyst for enabling community-led projects to develop their plans and leverage funding for projects. They considered that AHF had an impact in the way in which it provided advice and promoted partnerships within the heritage and regeneration sector. They perceived that in this way it was helping to provide more resources for community-led heritage regeneration.

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Executive summary (3 of 3)

11. In terms of the draft AHF Theory of Change, AHF is considered to deliver the following **impacts**:
    - **Helping to deliver buildings for sustainable use for benefit of communities**: Beneficiaries provided examples of the way in which AHF funding and support at early stages (and at times via loans) is helping to deliver buildings which it is hoped will be in sustainable use in communities and which will provide critical social infrastructure in communities. Stakeholders perceived AHF to play a part in this, and that they are often a catalyst to these impacts happening, however AHF was not the only funding in the mix; other organisations provide more funding and support which leads to these longer-term, wider impacts.
    - **Playing a part in economic and civic regeneration**: Some beneficiaries and stakeholders expressed the belief that this would lead to economic and civic regeneration, and that AHF is playing a contributing role in this along with other funders and organisations who are involved closer to the delivery of final projects. Some beneficiaries identified that AHF had already played a role in contributing to economic regeneration by creating job opportunities and volunteering roles through their funding and advice. They perceived that the associated benefits of transforming derelict buildings into functional spaces has helped to boost local economies.
12. Stakeholders considered that if AHF did not exist, less activity would be happening in Scotland. Beneficiaries considered that if AHF did not exist, many old buildings in Scotland would remain dilapidated or be lost entirely.
13. Stakeholders considered that AHF has a key role to play going forward in delivering 'Scotland's Historic Environment Strategy'.

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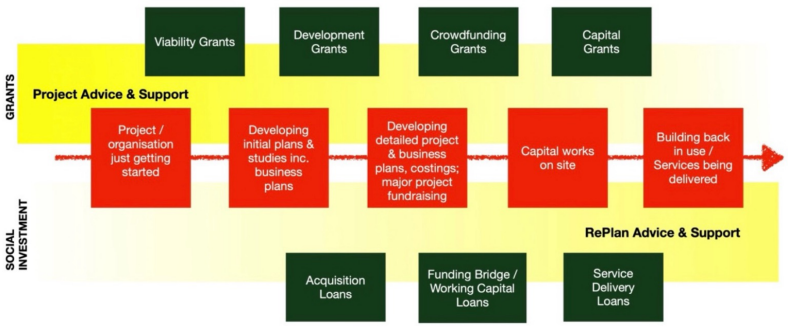
2. What is AHF's role in Scotland?

The Architectural Heritage Fund in Scotland

- The AHF provides project development grants and other non-financial elements of support for community-led heritage regeneration projects
- AHF grants are designed to help with early-stage costs as groups explore the feasibility of re-using redundant historic buildings and undertake project development work, in readiness for a capital project
- AHF loans help organisations to purchase buildings, undertake capital works, and/or provide cashflow as organisations launch their operational business
- AHF is currently two-thirds of the way through delivering a three-year programme of funding 2022-2025, utilising funds provided by Historic Environment Scotland (HES), and additional funds from the William Grant Foundation (WGF)
- The diagram illustrates the way in which AHF provides investment and support to beneficiaries



The AHF's Investment and Support System

Source: AHF – Tender Brief for External Evaluation of Scotland Programmes: Transforming Scotland's communities and places through heritage-led sustainable regeneration

3. What activities has AHF delivered between 01 April 2019 and 31 March 2024 in Scotland?

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Activities delivered

- **644 enquiries**

leading to

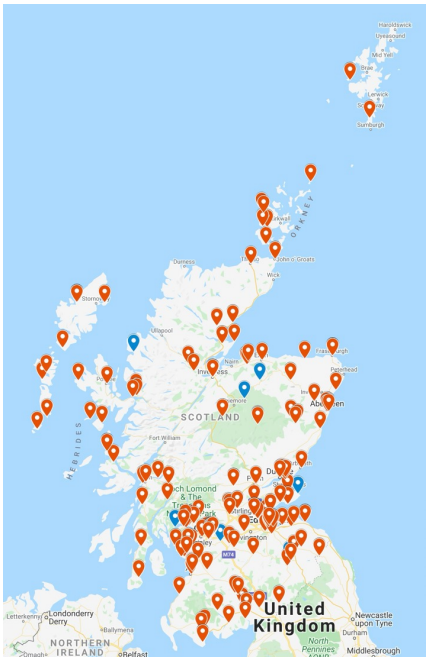
- ***332* grant applications** requesting **£3.63M** of funding

leading to

- **263 grant offers**, totalling
- **£2.4M** of grant funding offered, to a total of
- **193** different non-profit organisations, supporting
- **201** different built heritage regeneration projects

and

- **15 loan offers** totalling more than
- **£3M** to Scottish projects, with
- Loans scaling from **£39k** to over **£1.4m**



Source: AHF

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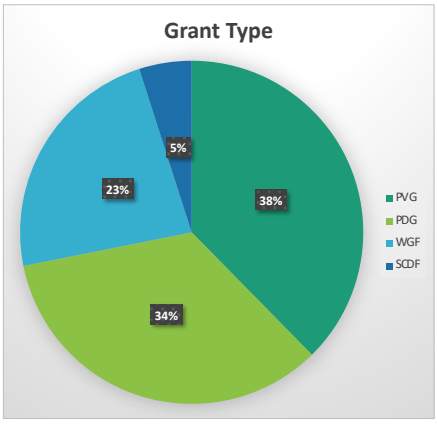
4. How has AHF delivered this activity, what resources has it used to do so?

AHF resources used to deliver its activity

- **Two Full Time Staff Based in Scotland**
  - Posts funded by Historic Environment Scotland (HES) grant
- **Current Annual Grants Budget:**
  - £325,000 from HES
  - £100,000 from William Grant Foundation (WGF)
  - Total annual budget of £425,000
- **Five-year summary:**
  - Project Viability Grants: 99
  - Project Development Grants: 103
  - WGF Tailored Support Fund Grants: 61
  - Loan Offers: 15
  - Total grant amount requested of us: £3.63M (332 applications)
  - Total grant amount offered: £2.4M (263 offers)
  - Need met: 61% of requests



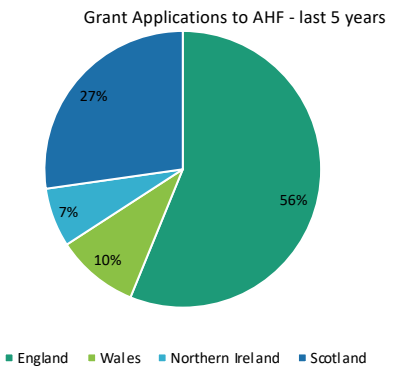
Source: AHF

5. How adequately does AHF meet demand for financial support in Scotland?

Context setting and demand for AHF funding and support

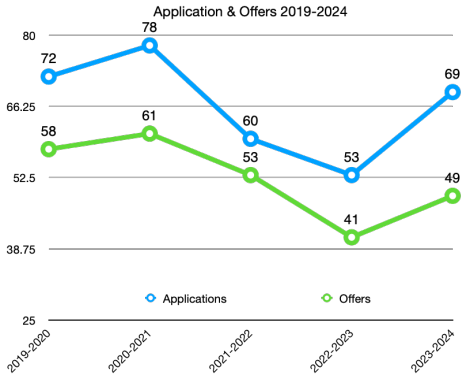
Demand for AHF support in Scotland is high

Approximately one third of all applications in the UK are from Scotland, which is disproportionate given the relative size of the population.



Demand is rising post-Covid

Demand for AHF funding and support in Scotland, as measured by numbers of applications, is rising again after a dramatic drop immediately post-Covid (blue line).



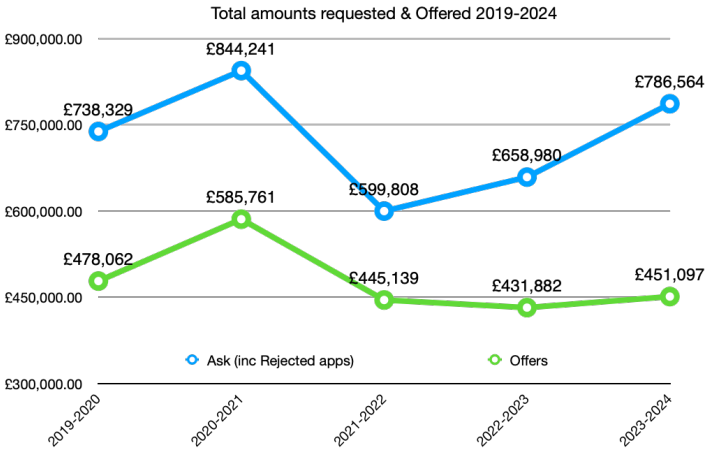
Source: AHF and AHF Scotland 2023-24 Review HES Partnership Fund p2

AHF funding availability

Demand is outstripping the funds available

The amount of financial support AHF can offer projects (total annual grants budget) has remained roughly static for the last five years (with the exception of an additional one-off top-up of £200,000 thanks to Covid emergency funds in 2020-21).

The 'gap' between the amount of funding AHF is being asked for, and what the grants budget can meet, is consistently widening; see the widening split between the blue and green lines.



Source: AHF Scotland 2023-24 Review HES Partnership Fund p2

Beneficiaries expressed mixed feelings about the adequacy of grant funding received from AHF, with several suggesting that the amount should be increased to reflect rising costs

While the qualitative research beneficiaries appreciated the grant support they had received from AHF, there was consensus **that increased funding would better address the rising costs associated with heritage projects and enable more comprehensive project development and completion**.

Beneficiaries made a range of arguments for increasing grant amounts:

- **Rising cost of living / project costs:** while every little bit helps, the increasing costs of projects pose significant challenges for projects:
  - While AHF grants were helpful, they were not enough to cover all expenses for feasibility and viability work
  - AHF grants represent a decreasing percentage of what is needed for project development
- **Limited funding impacts on project progression**
  - Additional AHF funding would have allowed projects to rely less on their own resources and accelerate progress on projects
  - For example, external painting of windows and addressing heating issues which had to be postponed due to financial constraints
- **The input from AHF is crucial**: grant amounts that reflect the importance of the AHF role could allow for deeper involvement
- **Having fewer funders can help make project management less onerous and more efficient**

"I think in today's economy, I think that it could be reviewed the amount, you know, that up to £40,000. You know, it does come on the page as quite a small percentage of what you having to find elsewhere." (Beneficiary 4)

"I think there's a point where because of the costs of everything have gone up so much, then maybe allocations perhaps need to be a little broader." (Beneficiary 1)

"I think that the input is so important that figures should reflect that, and allow them to be more involved in projects, even more involved than they already had, because I find that their experience and their input is the most valuable." (Beneficiary 4)

"The more funders you're dealing with, the harder that is to manage. So, you may be managing a build, and you may be managing seven or eight funding funders at the same time, with deadlines and reports and outcomes and so forth as well, and that makes, you know, the project manager's job quite onerous sometimes." (Beneficiary 4)

Source: Beneficiary qualitative interviews

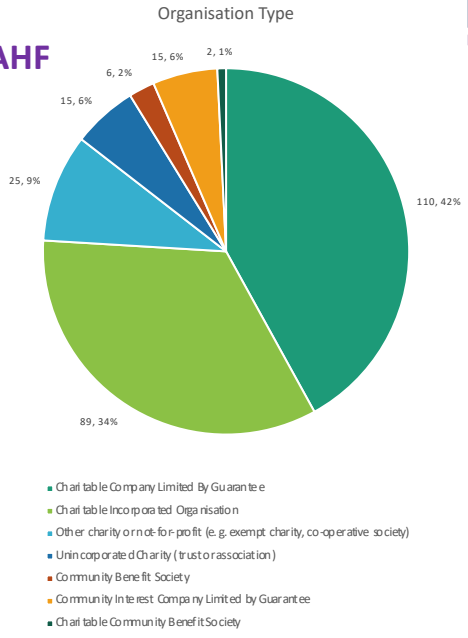
6a. What type of organisations have been impacted by AHF activity in Scotland?

Types of organisations supported by AHF

At least half of grant offers were made to organisations new to AHF

- 54% of grant offers overall were to 'new' organisations who had not previously applied for AHF funding relating to a historic building regeneration project
  - Earliest stage Viability Grants – 65% were new clients
  - WGF funded grants – 79% to new clients

Most organisations receiving grants were charities: Charitable Company Limited By Guarantee or Charitable Incorporate Organisation



Source: AHF

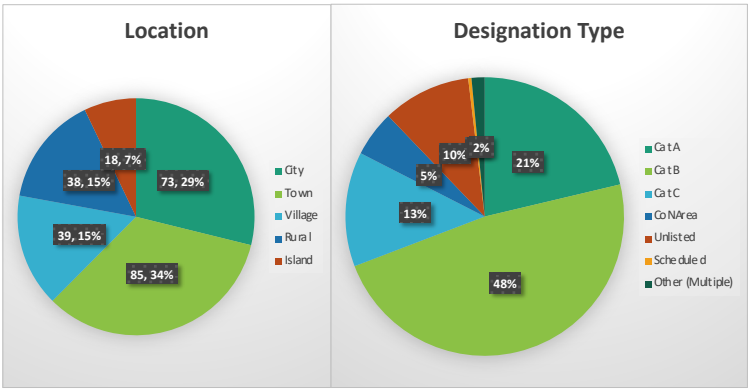
Base: n=263 projects

6b. What type of projects have been impacted by AHF activity in Scotland?

Types of projects impacted by AHF activity in Scotland

Projects in Category B buildings / and in towns represent the largest single types of projects

- 35% of projects (91) are on the Scottish Buildings at Risk Register
- 56 projects related to Category A listed buildings
- 126 projects related to Category B listed buildings
- Around 1/3 of projects are in cities, 1/3 in towns, and 1/3 more rural or island locations
- 68% of funded projects are in the top 30% areas of deprivation (SIMD)
- AHF funded projects across 30 of the 32 Scottish Local Authorities
  (Only East Renfrewshire and East Dunbartonshire had no projects funded in the last 5 years)



Base: n=253 projects

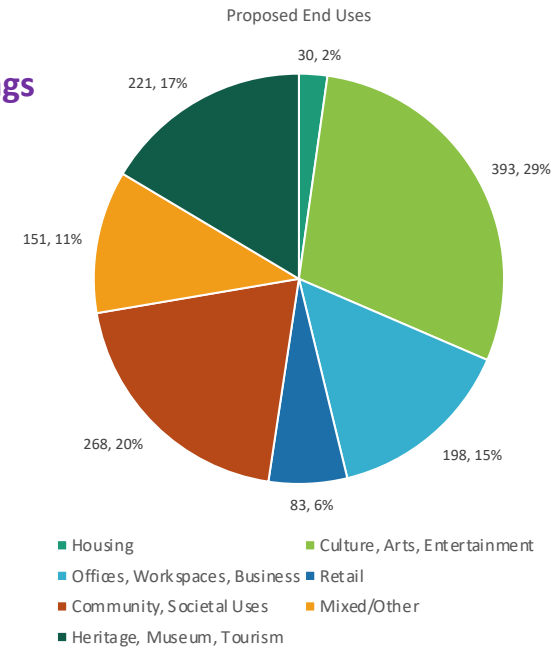
Base: n=253 projects

Source: AHF

Proposed end use of buildings

Most projects have more than one proposed end use

- The most common proposed end use is for culture, arts and entertainment (29%), followed by community and societal use (20%)
- *NB The proposed end use is based on the project plans at the time of application; final uses may vary as projects develop*



Source: AHF

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7. What has AHF delivered in Scotland against the Historic Environment Scotland outcomes / KPIs?

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Summary: Historic Environment Scotland Outcomes 2020-2024

Heritage & Society

- 130 organisations in deprived areas supported in developing heritage-led projects
- 125 organisations supported to obtain control of historic buildings
- 698 different activities/services delivered by community groups from historic buildings

Heritage & Environment

- 99 organisations have directly advanced projects towards capital redevelopment
- 186 historic buildings have viable early plans in place for repair and re-use
- 137 organisations are enabled to adopt climate change response measures

Heritage & Economy

- 240% additional investment directly leveraged towards developing heritage-led projects by AHF grants (Leverage based on planned direct expenditure and match funding listed at the time of grant application, relating only to elements AHF funding was supporting directly)
  - Viability grants (no match funding required to encourage new organisations to apply) – 196%
  - Development Grants (match funding requirement) – leverage of 275%
  - Overall, £2.4M of grant offers leveraged £5.8M total funding
- 90,165m2 total estimated vacant space to be repurposed and re-used to support thriving places – about 15 football fields of space! (Estimate of vacant space being brought back into use based on floor areas of projects provided at grant application stage)
- 497 opportunities for skills development and employment in AHF supported projects

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Source: AHF

HES Outcomes Delivery – 2020-2024

- AHF exceeded all 10 HES targets in 2023-24
- AHF exceeded 8 HES targets in 2022-23, with 2 targets partially achieved

2023-24	No.	Category	Description	Target	Outcome	% Achieved
	1	Heritage & Society	30 organisations in deprived areas supported in developing heritage-led projects.	30	31	103%
	2	Heritage & Society	30 additional organisations are managing historic buildings.	30	33	110%
	3	Heritage & Society	Community groups are enabled to deliver 100 activities/services from historic buildings.	100	167	167%
	4	Heritage & Environment	25 organisations have advanced projects towards capital redevelopment.	25	27	108%
	5	Heritage & Environment	30 historic buildings have viable early plans in place for repair and re-use.	30	50	167%
	6	Heritage & Environment	10 instances of engaging in/delivering sector advocacy/awareness-raising events.*	10	16	160%
	7	Heritage & Environment	40 organisations are enabled to adopt climate change response measures.	40	44	110%
	8	Heritage & Economy	AHF-funded organisations lever 200% investment towards developing heritage-led projects.	200	212	106%
	9	Heritage & Economy	13,000 sq m vacant space to be repurposed and re-used to support thriving places.	13000	23382	180%
	10	Heritage & Economy	AHF-funded projects provide 100 opportunities for skills development and employment.	100	162	162%

2022-23	No.	Category	Description	Target	Outcome	% Achieved
	1	Heritage & Society	30 organisations in deprived areas supported in developing heritage-led projects.	30	26	87%
	2	Heritage & Society	30 additional organisations are managing historic buildings.	30	34	113%
	3	Heritage & Society	Community groups are enabled to deliver 100 activities/services from historic buildings.	100	144	144%
	4	Heritage & Environment	25 organisations have advanced projects towards capital redevelopment.	25	26	104%
	5	Heritage & Environment	30 historic buildings have viable early plans in place for repair and re-use.	30	32	107%
	6	Heritage & Environment	200 instances of peer support in managing heritage-led projects by HTN.	200	206	103%
	7	Heritage & Environment	40 organisations are enabled to adopt climate change response measures.	40	38	95%
	8	Heritage & Economy	AHF-funded organisations lever 200% investment towards developing heritage-led projects.	200	287	144%
	9	Heritage & Economy	13,000 sq m vacant space to be repurposed and re-used to support thriving places.	13000	18950	146%
	10	Heritage & Economy	AHF-funded projects provide 100 opportunities for skills development and employment.	100	335	335%

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Source: AHF

HES Outcomes Delivery – 2020-2024

- AHF exceeded 5HES targets in 2021-22, with 5 targets partially achieved; these outcomes were affected by changes to typical application type and volume caused by pandemic, and target outcomes were not adjusted to account for that. Targets in subsequent years were adjusted accordingly.
- AHF exceeded 9 HES targets in 2020-21, with 1 target partially achieved

2021-22	No.	Category	Description	Target	Outcome	% Achieved
	1	Heritage & Society	40 organisations in deprived areas supported in developing heritage-led projects.	40	28	70%
	2	Heritage & Society	30 additional organisations are managing historic buildings.	30	29	97%
	3	Heritage & Society	Community groups are enabled to deliver 200 uses/services from historic buildings.	200	186	93%
	4	Heritage & Environment	25 organisations have advanced projects towards capital redevelopment.	25	20	80%
	5	Heritage & Environment	30 historic buildings have viable early plans in place for repair and re-use.	30	46	153%
	6	Heritage & Environment	200 instances of peer support in managing heritage-led projects by HTN.	200	287	144%
	7	Heritage & Environment	25 organisations are financially resilient/ sustainable	25	39	156%
	8	Heritage & Environment	25 organisations are enabled to adopt climate change response measures.	25	39	156%
	9	Heritage & Economy	AHF-funded organisations lever 200% investment towards developing heritage-led projects	200	215	108%
	10	Heritage & Economy	25,000 sq.m vacant space to be repurposed and re-used to support thriving places.	25000	19027	76%

2020-21	No.	Category	Description	Target	Outcome	% Achieved
	1	Heritage & Society	25 organisations in deprived areas are supported in developing heritage- led projects.	25	45	180%
	2	Heritage & Society	25 additional organisations are managing historic buildings.	25	29	116%
	3	Heritage & Environment	Community groups are enabled to deliver 100 uses/services from historic buildings.	100	201	201%
	4	Heritage & Environment	25 organisations have developed robust projects	25	26	104%
	5	Heritage & Environment	50 'live' projects aiming to bring historic buildings back into sustainable use.	50	58	116%
	6	Heritage & Environment	25 historic buildings have viable plans in place for repair and re-use.	25	42	168%
	7	Heritage & Environment	60 opportunities for individuals to support peers in managing heritage- led projects by HTN	60	215	358%
	8	Heritage & Environment	20 organisations are supported in developing their capacity to manage heritage-led projects.	20	35	175%
	9	Heritage & Environment	15 organisations are financially resilient/ sustainable.	15	26	173%
	10	Heritage & Environment	25 organisations are enabled to adopt climate change response measures.	25	16	64%
	11	Heritage & Economy	AHF-funded organisations lever 200% investment towards developing heritage-led projects.	200	245	123%
	12	Heritage & Economy	25,000 sqm vacant space to be repurposed and re- used to support thriving places.	25000	28806	115%

Source: AHF

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8. What is unique about how AHF delivers its work compared to other funders in Scotland?

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All stakeholders agreed that AHF plays an important role in the funding landscape across Scotland

- Stakeholders were positive about about the work of AHF in Scotland, its role and the impact that it has as an organisation
- AHF is considered to play a significant role in the sector in Scotland, in addition to its role at an individual project level
- There was some comment that in a challenging context AHF has continued to grow and develop its impact
- Stakeholders also considered AHF to be visible across the sector to both funders and projects: attending events and raising the profile of the organisation, making connections as well as providing advice and financial support at a project level
- Stakeholders had varying levels of specific knowledge of the work of AHF; some knew more about the work of AHF than others, but this generally aligned with how much engagement they had with AHF. Knowledge levels impacted on stakeholders' ability to discuss the detail in the Theory of Change model.

"I think they're quite visible … As well as they seem to come along to a lot of sector events as well and stuff, and I think that's really important … so they're sort of engaging in the sort of wider strategic issues as well." (Stakeholder 1)

"It's rare that I like an organisation as much as I like them. And I would be very frank about saying things if I didn't think they were doing really well. But they're excellent. Their advice is excellent. They're a pleasure to work with … The staff members in Scotland are really knowledgeable. Whenever I speak to them, it's always a pleasure." (Stakeholder 2)

"It's been a pretty challenging five years. .. My sense is that they've grown their impact, I think, over the last few years." (Stakeholder 5)

"Being connected and staying up to date and taking the time to do that, it's not easy to do in our sector. There's so many small organisations, it takes a lot of time and thought to stay well connected with other organisations and keep everyone up, which just achieves a higher level efficiency than if you don't stay in touch … it has a big impact in projects, communities, that area, that building, that area, those people, but also in the sector. They attend events, they contribute, they take part and they really do help connect people." (Stakeholder 6)

Source: Stakeholder qualitative interviews

Beneficiaries also considered that AHF plays an important role in the funding landscape in Scotland

- Beneficiaries were also very positive about the role played by AHF
- They considered that it provides early-stage funding, facilitating project development, offering expert guidance, helping projects to leverage additional funds from other funders, and ultimately contributing significantly to beneficiaries' projects to restore and repurpose old buildings to benefit local communities in Scotland

"AHF has been absolutely instrumental in phases of those projects which were very hard to generate funding for otherwise." (Beneficiary 3)

"Their impact has really helped us to unlock larger grants from other organisations." (Beneficiary 2)

"AHF is a top player in supporting community initiatives." (Beneficiary 7)

Source: Beneficiary qualitative interviews

Summary: What is unique about how AHF delivers its work compared to other funders in Scotland?

- Stakeholders and beneficiaries had different perspectives on the distinctiveness of AHF in comparison with other funders in Scotland
- Analysis of how stakeholders and beneficiaries describe the role played by AHF in Scotland, revealed that each group emphasises slightly different elements that make AHF distinctive. Stakeholders are able to form a view across many projects, whereas a beneficiary forms their view from their own experience
- We have analysed each group separately to pull out the key elements identified
- The main areas of agreement were:
  - AHF plays an **important role in the funding landscape** across Scotland
  - AHF provides **early-stage funding** which enables projects to develop and **leverage** funding from other sources
  - AHF is **approachable and supportive**
  - AHF is perceived to be **flexible and understanding** by beneficiaries, which partly seems to correlate with stakeholder perceptions of it as a funder which is that the organisation is **prepared to take risks** and to support community projects which would not achieve support elsewhere
- More detail is provided in the slides that follow on the specific views of stakeholders and beneficiaries

Source: Beneficiary and stakeholder qualitative interviews

Stakeholders perceived that AHF provides early-stage funding and support, which is otherwise difficult to access

- Stakeholders considered that AHF helps project initiators think through their project, develop possible ideas, and build their confidence over time to take the project forward
- Larger funders noted that because of this they can direct projects to AHF that they are unable to help because projects are at an early stage of development
- AHF is considered to act as a catalyst; giving support and resources to help projects at the very start of their journey
- AHF's advice and financial support help projects get off the ground
- This also means that in some cases AHF helps project initiators decide that they do not have a viable project, which was also considered as an important aspect to their role
- Stakeholders identified that as funding in the sector has reduced over time, this aspect of AHF's role has become more vital

"Delivering development funding … they are early-stage encouragers. They help build capacity of organisations who may well come [to funders] and others within the sector for capital funding further down the line … I kind of broadly speak about them as funders of development activities." (Stakeholder 2)

"It's the kind of exploratory funding package … catalyst funding, helping groups get going at the beginning and just … seeing if they have a sensible project on their hands and seeing if it's viable. They really help a huge number of projects get off the ground when they wouldn't be able to access any other funding yet. And they also help a number of groups figure out that they don't have a project and it's not going to work … So, it's really key in that there aren't really others funding that point." (Stakeholder 6)

"…All of the confidence, that kind of helping people frame their projects, all of that type of stuff … there's something about the way that they're able to move communities forward on heritage projects that's quite unique … There's something about just giving people bite sized chunks that they can kind of manage and take things forward. So capacity building." (Stakeholder 3)

Source: Stakeholder qualitative interviews

Stakeholders perceived that AHF can offer different ways to support organisations financially through its wide range of funding options including grants, loans and funding from the William Grant Foundation

- AHF has a range of ways to support organisations financially
- Stakeholders perceived that AHF's loan offer is part of its distinctive offering, as few organisations offer loans
- William Grant Foundation funding allows AHF further flexibility; it can fund activity that HES funding cannot

"I think the fact they can offer loans that very few others can, to me is the main way I distinguish them in my head." (Stakeholder 1)

"[The] William Grant funding that they have, in addition to their kind of core funding, is excellent as well … particularly the flexibility round about it." (Interview 3)

"[loans] it's a massively helpful element and I think it does make them unique. Not that people couldn't get loans elsewhere, but I suspect the organisations that they loan to and the comfort. It's not even the terms, because I think the terms are they can be quite pokey, but those loans make those projects happen. And those organisations wouldn't necessarily be getting loans easily elsewhere. And I think that's another element of risk there that they're prepared to take. But actually, it's really worthwhile for the heritage sector and the historic environment ... as a funder they would be far more sympathetic if something went wrong … obviously [project don't plan to default], but just having that comfort of knowing you could borrow from somebody who was working otherwise in the sector who had already funded you in other ways just [makes it] more palatable for a group of volunteers." (Stakeholder 2)

Source: Stakeholder qualitative interviews

Stakeholders perceived that AHF supports community projects that would not achieve support elsewhere

- Stakeholders commented that the projects that AHF funds would struggle to achieve funding elsewhere, not because they are not worthwhile but because they have some work to do to develop their project and their capacity to deliver it and to navigate the heritage support landscape

*"It would be, I mean, capital projects and the delivery of the riskier ones, getting the smaller scale ones off the ground. So they wouldn't be as impactful in getting local authority projects off the ground because they have the staff and the resources to get them there without them. But it's more the ones around the edges and frankly, the ones that are slightly more interesting because they tend not to be large public buildings, they tend to be very community interested buildings and that they are able to bring forward and support in ways that everybody else just isn't interested in doing or isn't able to do … **it's the little buildings that bring flavours to smaller places that they have really supported in developing and the riskier ones**." (Stakeholder 2)*

Source: Stakeholder qualitative interviews

Stakeholders perceived that AHF takes more risks on projects than other funders

- Stakeholders perceived that AHF is distinctive in supporting projects that would appear too risky for other organisations

"Their appetite for risk is really refreshing. They are prepared to take a risk on a project or an organisation, to test it, to do that options appraisal and come up with … the best option is not what anybody thought."
(Stakeholder 2)

"I've seen them fund projects that have failed multiple times, so just because it's failed in the past and they've already sunk £40,000 into it, £50,000 into it, doesn't mean they won't fund it again. Whereas … [other funders would say] … that's far too risky for public investment, whereas AHF would say, well, maybe it'll work this time … [Re x project example] they funded multiple phases of kind of development and then came in with revenue funding and revenue support funding for, during the process of the grant, when there was going to be cash flow problems, just really, really supported that project and it would not have happened if it hadn't been for that approach, that risk happy approach."
(Stakeholder 2)

Source: Stakeholder qualitative interviews

Stakeholders perceived that AHF often builds relationships for the longer term

- They consider AHF to be a highly supportive organisation, providing a lot of unofficial advice and support, shepherding and supporting projects through various stages of development.
- They considered that AHF often sticks with projects for the long term.

"They'll be in a project for years and years and years and they'll never step away. They just don't step away. It's amazing, really … It's just such a positive organisation. I think, in that respect, it's really interesting." (Stakeholder 2)

"The kind of long term relationship that AHF is open to having with communities and organisations … [they] might have a conversation with somebody when an idea is at an early stage and then, you know, maybe a year later they'll have another conversation when things have moved forward and crystallised a bit and maybe an application for funding will come in, maybe there'll be a viability grant and then, you know, based on the success of that, there might be an opportunity for some project development grant or things might kind of take another two years to kind of move forward or whatever, but they'll still be around and be interested and they'll follow success of progress of organisations or initiatives. And, you know, the longer term, if they need more support and advice, you know, then there's a sort of open door for that. If things get into trouble, they'll be, they'll try and be helpful in terms of responding to how they can help and in some cases their loan funding may come into play to help bridge, bridge cash flow needs or resolve kind of financing issues, etcetera. So that sort of sense of it's not just a transactional thing where you just, you know, you're eligible for a scheme that runs for a certain time and you bang in your application and you get the grant, you do your report and that's it. But ***this kind of long term commitment, interest and relationship seems to me with a degree of flexibility in terms of how, what support and resource can be provided alongside that. That feels to me to be distinctive as well."***
(Stakeholder 4)

Source: Stakeholder qualitative interviews

Stakeholders perceived that the AHF team is very approachable, which particularly helps community led projects navigate the old buildings / heritage funding landscape

- Stakeholders considered the AHF team to be very approachable
- They considered that AHF's processes were as simple as possible to help them be accessed by community organisations which may be largely staffed by volunteers
- AHF was perceived to respond more quickly than some larger organisations and to offer a wide range of expertise and advice

"Their approachability … because obviously they have quite a flat structure [compared to the more hierarchical structure of other funders]." (Stakeholder 2)

"I think they are, they're friendly and approachable, and that is extremely important to community groups, extremely helpful … actually going and making people feel valued and that their projects are interesting and important and giving them that really early key stage advice as to what they should do next in a friendly and approachable way because they're, they're not handing out £4 million, so people don't need to kind of be scared and concerned about speaking to them. And I think they give off such a nice friendly kind of vibe that it makes groups feel comfortable in having conversations with them." (Stakeholder 6)

"I think from a community perspective … they're very accessible and they're very approachable … The heritage sector can be a wee bit rarefied in terms of people that it's all about the heritage. And actually I think they are … It is about demystifying the whole package of taking on a heritage asset from a community perspective, and I think they make it manageable and accessible and they're just both very approachable." (Stakeholder 3)

"I think there are probably two really consistent and valuable things about them. One is, I think, that openness and accessibility to responding to enquiries or approaches from people at the early stages of thinking about heritage asset, community asset projects … My sense is they have a sort of reputation and a profile as being a good first port of call if, you know, if you've got an inquiry about, you know, what your group might be able to do with a building in your community. And, you know, my sense is that they're very accessible, responsive and supportive … that feels important to me. I imagine if you're community group member, not got a lot of experience with this, approaching the lottery or historic environment, Scotland might feel a bit intimidating." (Stakeholder 4)

Source: Stakeholder qualitative interviews

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Beneficiaries considered AHF to be an approachable and supportive funder

- Beneficiaries praised AHF for its approachable and supportive approach
- Some contrasted the relationship they had with AHF with more distant relationships that they had with other funders
- Beneficiaries valued the personal relationship they had developed with the AHF team
- Some attributed this to the fact that the AHF team was small and therefore personable in a way that larger funders were not
- They considered that AHF was easy to communicate with, friendly and efficient; it was nimble and responsive in comparison to larger funders which beneficiaries perceived to have more complex, drawn-out and at times opaque funding application processes
- Beneficiaries considered that AHF had helped them to resolve issues promptly and valued the ongoing support that AHF had provided throughout project delays or challenges

"It comes over that they care about their clients and how it's going, and it's that personal relationship that makes a huge, huge difference. You know, we've had funders that say, 'Well, yes, you can have the money', but they're so distanced you'd be scared to death to ring them up! Yes, I would ring Jo, you know, and have a chat … and that helps both of us, because if you've got funding and something does go amiss, you need to be able to phone and have that relationship and they understand where you're coming from, you know where they're coming from and how to resolve any issues. So it's incredibly important … they're marvellous for that." (Beneficiary 1)

"The fact that they're quite small, so there's only Gordon and Jo, and they've been there now for some time. So it's simple to pick up the phone to one or other of them, but it's often unclear who one should speak to in the Lottery, for example, where there seems to be a very high turnover of staff. And so I don't have a relationship with anyone in the lottery or Historic Environment Scotland, for that matter, like I do with Gordon and Jo." (Beneficiary 7)

"I still remember one of the conferences that we went to, I think it was a heritage trust network conference, and I'm sure Gordon Barr from AHF did a presentation about the work of the AHF that day, and that was actually an opportunity for a one-to-one chat with him afterwards, which led to the loan, securing the loan." (Beneficiary 2)

Source: Beneficiary qualitative interviews

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Beneficiaries considered that AHF had a valuable specialist focus on architectural heritage as well as local knowledge

- Some beneficiaries mentioned that AHF's clear focus on architectural heritage funding and its transparent funding criteria set it apart from other funders
- They valued the specialist knowledge that the AHF team provided
- They appreciated the clear focus on architectural heritage funding
- They appreciated the clarity provided by AHF's website and pre-application discussions
- Some beneficiaries valued the local Scottish perspective that AHF brought to their projects

"Some funders, it's a wee bit airy fairy, if you know what I mean, in that it's slightly indistinct about what they might be able to fund, whereas I think with the AHF, it's pretty clear." (Beneficiary 6)

"It would be the level of knowledge and support available them … the highest level I probably had from any funder of that level of funds. So when I think of the Heritage Fund for example they are giving us about [several] million quid. So the level of support we're getting from them is fantastic. But for AHF who are given relatively lower grants the level of support that you get is probably higher than you get from any other funder of that kind of level." (Beneficiary 2)

"One of the things that they bring to the Scottish landscape is that they bring a local Scottish perspective … I was based in London a long time, and I think it's interesting to be based in Scotland and see the value of that and the other projects that they're working with, that's in Scotland. So I guess that there's real value there. For me, it's one of the things that I watch for because I've been in situations where it's missing elsewhere." (Beneficiary 5)

Source: Beneficiary qualitative interviews

Beneficiaries considered that AHF was critical in ensuring they could leverage essential additional funding

- Beneficiaries considered that AHF support gave them confidence and credibility
- They valued the way in which AHF's support helped them access funding from other funders
- Some beneficiaries also had experience of AHF stepping in to provide essential funding support and help during difficult times financially

"An organisation that provided a lifeline for us when we were in jeopardy of going out of business through no fault of our own, just through delayed payments from other funding sources, specifically for the heritage project, their impact has really helped us to unlock larger grants from other organisations." (Beneficiary 2)

"It's been quite often very difficult phases in the development of projects or phases where we had to address an issue really suddenly that was not an easy sell. So putting in drains and mains, water and power and so on from the high street at speed was a really hard sell. And having AHF jump in on that quite quickly was really great; being able to go to other funders and say, 'well, you know, if everybody chips in a small amount, we've got this bit from AHF.' And so that has been absolutely the case that really that allowed us to pull together other funders like that. And the other thing … was that AHF put us in touch with the William Grant foundation, who have given us a really sizable chunk of money." (Beneficiary 3)

Source: Beneficiary qualitative interviews

Beneficiaries considered AHF to be a flexible and understanding funder

- Some beneficiaries appreciated the flexibility AHF showed in its grant funding process, which allowed small organisations to deliver against funding requirements without undue pressure
- They valued the understanding and trust AHF demonstrated regarding their organisational capacity
- They compared them favourably with other small funders who could be less flexible and understanding of the delays and challenges encountered in project development and delivery

Loans

- The two beneficiaries interviewed who had received loans, emphasised that the loans were crucial for maintaining project momentum during financial difficulties, enabling them to leverage additional resources, improve governance, build teams, and secure further investments
- The familiarity and understanding shown by AHF towards their specific situations made AHF a trusted partner in navigating these financial challenges

"The funding that we've had from Architectural Heritage Fund, they have worked with us. If I've needed parameters moved, you know, 'Can I have a little more time? I'm unable to give this paperwork at the moment because I don't get it from here till then.' And so it's been a really direct relationship, that's really honest relationship there as a funder. And critically, for a small organisation that was precarious with not lots of resources, particularly 2018/2020 kind of time pre pandemic, the reporting system wasn't too arduous for us to be able to cope with. Some funders for small pots, like £5000, you have to jump! It can be quite taxing for tiny organisations, because your resources, the need to report in for small pots of money, can sometimes really be a pressure." (Beneficiary 4)

"They provided the loan and it allowed us to survive." (Beneficiary 7)

Source: Beneficiary qualitative interviews

Stakeholders considered AHF to be a trusted partner; beneficiaries who had experience of working with AHF on multiple projects and / or multiple grants also considered AHF to be a trusted partner

- Funders considered AHF to be a trusted partner, which is effective in supporting the sector in Scotland

"I find them a trusted pair of hands." (Stakeholder 1)

"We see each other at different sectoral events or meetings or whatever, you know, you built up a relationship, a trusted relationship, and it does feel as if we're all kind of moving in the same direction and trying to move projects forward." (Stakeholder 5)

- Some beneficiaries also talked about AHF as a trusted partner

"If they weren't there, we would have to be stumbling around to try to find another source of funding for options appraisals and feasibility studies and other support to develop projects. And, you know, that might be possible, but it would be very difficult and very time consuming, whereas we know if we're developing the right kind of project that they're going to support it…It's that knowledge that as long as we've discussed it with them, they're likely to support what we're doing, that they'll make every effort to give us what we're asking." (Beneficiary 7)

"An organisation like AHF knows what you do and how you do it. They understand where we're coming from with things … AHF are responsible for something even bigger because of the network of funders that they're connected to. Much later in this project, when costs had gone through the roof and these things happened, it was AHF that introduced another funder to us who actually gave us a fairly sizable chunk of money to get the project finished. (Beneficiary 1)

"They're a key stakeholder in our ambition. (Beneficiary 5)

Source: Stakeholder qualitative interviews

9. What have been the main impacts identified by beneficiaries of AHF activity in Scotland?

Beneficiaries considered that AHF has a substantial impact considering that its grant funding amounts were limited. They emphasised AHF's role as a catalyst or enabler in providing funding and support that helps other things to happen, as well as playing an important role in preventing financial crisis for some

- **AHF acts as a catalyst**: Beneficiaries emphasised that AHF's key impact was as an enabler, providing the funding catalyst and support for projects to get off the ground, to develop and be successful
- **AHF has helped prevent financial crises:** For some beneficiaries, AHF had provided critical financial lifelines during crises caused by delayed payments from other funders, helping organisations unlock larger grants by assisting with project viability and development work like surveys, feasibility studies and business plans
- A range of other impacts were identified by beneficiaries of AHF activity, beyond the monetary value, these were specific to their projects and therefore in a range of areas, some projects e.g. noted **training and skills development** as an impact**.** Some projects supported by AHF have later involved training in trades such as stone masonry and joinery, offering meaningful hands-on training opportunities that had helped young people gain valuable skills

"I think other communities across the country look at what's happening in [town] and want to replicate it. And I think others who own or aspire to own buildings in [town] can see what's happening to the buildings that AHF have supported. And I think it inspires them that, you know, you can rescue old, old stuff that looks beyond repair and you can bring it back into, into use. So, yeah, I would say very, very high impact. It's small amounts of money at, in the big picture because these projects always cost so much, but it's small amounts of money very carefully targeted at points when we certainly would really have struggled to move things forward, but then out of that grows all this really big scale impact."
(Beneficiary 3)

"It's very much that enabling, you know, for people to get to a point where they can do the next thing. I mean, that's a huge step. And having that as part of their, you know, what they are prepared to fund, you know, development, that's crucial. I mean, there's a lot of community groups out there and especially now looking at, you know, community ownership of buildings, running services out of buildings, they need to be able to explore the possibilities. And that needs money, and that's the thing, where do they go? And those people aren't necessarily experienced at applying for grants and necessarily known a great deal about the funding landscape. So that's where I think they really top everybody else."
(Beneficiary 1)

Source: Beneficiary qualitative interviews

"The AHF were one of the first funders to support this development which subsequently led to other funders supporting us - the ***first funder is always critical to give confidence to others*** to support and we are truly grateful to the AHF for early stage support." (PDG312)

"Having AHF as a funder has also been a key factor in ***securing match-funding*** and ***building confidence*** both within the community and with funding partners." (PDG806)

"The AHF Grant was offered at a key point in the early development of the project and was much appreciated. The project will now proceed through Planning and Warrant stages to enable the Contract to be let subject to the final fund raising being secured. While a larger grant would have been well used the ***early support from AHF encouraged other funders to support the project at a critical time*** in the early development stages. This included the negotiations for the acquisition of the [building]." (PDG491)

"We were really grateful that the AHF held open their grant despite the HLF refusal. The £7k PDG provided the ***essential match funding*** to secure a grant from the Scottish Landfill Communities Fund, which to enabled us to implement a phase of palliative works to the monument." (PDG434)

"The grant enabled us to employ two part time contractors, ***one to create a fundraising strategy and start submitting applications and one to trial events / workshops*** at the Old school to help us plan its future use as a field studies centre, traditional skills and crafts workshops centre." (PDG795)

"We could not have commissioned this work without the commitment of the AHF, in awarding us the viability grant and advising us on the process of tending. Because of the AHF grant we were able to ***attract match funding from two other funders in order to commission a substantial piece of work*** which is extremely thorough and will help us with future fundraising and guide us through the next stages." (PVG698)

"The Project Development Grant allowed us to ***bring in a professional fundraiser*** who played a very important role in our recent fundraising campaign. Prior to COVID 19, AHF provided a much needed working capital loan allow us to invest in the business for the future. AHF provided support when we needed it the most." (PDG491)

Source: Beneficiary exit survey

Beneficiaries discuss different types of grants achieving slightly different impacts

Analysis of the two groups, PVG and PDG beneficiaries revealed that each group highlighted different aspects of the support that were particularly beneficial for their projects when discussing their satisfaction with AHF

Project Viability Grant respondents

- **Financial support for studies which are fundamental initial building blocks**: Support enabled grantees to engage architectural and conservation specialists, develop design approaches, and support viability studies
- **Invaluable advisory support:** Alongside financial assistance, the advice and guidance provided by the AHF team was considered to be invaluable. This included help with application processes, strategic planning and navigating challenges particular challenges
- **Boosting organisational confidence:** The funding not only helped assess project viability but also boosted organisational confidence in managing complex heritage projects. It allowed beneficiaries to shape plans and grow in confidence to take those plans forward
- **Supporting community engagement**: Funding helped engage communities in shaping plans, providing a clear vision for going forward
- **Leveraging other funding**: Early support from AHF was crucial in attracting match funding from other sources

Project Development Grant respondents

- **Enabling further development**: Grants from AHF enabled significant steps forward in project development stages such as planning permission, architectural works, and securing additional funds necessary for project continuation
- **Enhancing organisational capacity**: Funding supported the hiring of essential personnel like project officers, which was crucial for projects as many organisations rely on volunteers
- **Community engagement and ownership:** Support from AHF facilitated greater community involvement in projects, helping to foster a sense of ownership among local stakeholders and contributing to a stronger sense of community development
- **Emergency support:** In cases where projects faced immediate threats or emergency situations (e.g., unstable masonry), AHF's quick response with emergency funding was a lifeline that allowed projects to continue
- **Leveraging other funding**: Support from AHF was crucial in helping build confidence with other funders

Source: Beneficiary exit survey

10. What do stakeholders consider have been the main impacts of AHF's work in Scotland?

Summary: What do stakeholders consider to have been the main impacts of AHF's work in Scotland?

The involvement of AHF in projects acts as a reassurance or 'seal of approval' for larger funders

- Stakeholders also commented on the significant expertise of the team in Scotland, the work that they do reaching across Scotland and the level of awareness that there is of AHF despite the team only being two people
- There was a clear sense form stakeholders that AHF 'punches above its weight'

AHF builds a pipeline of projects across the sector, which other funders can then respond to

"The confidence with which they work, you know, there's not a lot of doubt. It's born out of years of experience … And just those years and years of experience give … depth of knowledge about the sector, which is very useful … They are an excellent source of historical information about projects. They also have great early stage awareness of projects that may be coming to us down the pipeline." (Stakeholder 2)

AHF work is having an impact on communities right across Scotland, but this is difficult to measure

"The reach they have, I think through these small viability or development grants, it's impressive. Everything from the northern isles to the border and the range of projects from tin sheds, auction marks and churches … The range of things that they're able to support through that lens of community heritage and built heritage is extensive. So I think they really do have good reach." (Stakeholder 4)

"At a sector level in Scotland as well, they're very effective with the resources they have, that is two members of staff funding available to them. They do, you know, they pack a punch." (Stakeholder 6)

Source: Stakeholder qualitative interviews

Stakeholders perceived that the involvement of AHF in projects acts as a reassurance or 'seal of approval' for larger funders

- AHF funds activities that enable projects to demonstrate project feasibility / viability
- AHF support means that projects can then seek funding from larger funders

"I think they basically take all projects from pretty much zero to just that first level as to then whether they'll get picked up by someone else, by bigger funders or by communities, heritage trusts, whether it will then become a consultancy work for professional organisations or certainly helping the main building preservation trust to figure out which project is going to go forward next." (Stakeholder 6)

"If it's clear that they've engaged with the Architectural Heritage fund, there's almost a degree of confidence that we already have about that organisation's understanding of what a project is, how it works, what they should have, how they should think, who should be on it. So that really adds a level of comfort in what we then assess as a capital project going forward." (Stakeholder 2)

"(If) a project comes in front of us and we haven't been able to [visit it] yet, and you're sort of not sure whether it's a runner basically or not, that gives you a bit more confidence if they've been involved and they've seen it on site ... if we haven't had as much involvement up to that point, if AHF have been involved. Yeah, it definitely gives more confidence that. And, you know, that it could be of interest to us as well." (Stakeholder 5)

Source: Stakeholder qualitative interviews

Stakeholders perceived that AHF builds a pipeline of projects across the sector, which other funders can then respond to

- Stakeholders perceived that AHF's funding and involvement builds a pipeline of projects for the sector, doing lots of early stage work, helping projects get to the stage where they can go to other funders.

"There wouldn't be a pipeline without the AHF funding because groups just wouldn't be able to explore the opportunities without that kind of, that little chunk of money at the beginning." (Stakeholder 6)

"[There are] different levels of funding, but that sort of pipeline or almost free project development … that's a lot harder to find, and … something like the Architectural Heritage can come in and so when they're coming to us, there is an element of reassurance." (Stakeholder 1)

"Architectural Heritage Fund is much more about pipelining projects towards funding solutions, larger term funding solutions, and also providing financial support for projects that are on site." (Stakeholder 2)

Source: Stakeholder qualitative interviews

Stakeholders perceived that AHF work is having an impact on communities right across Scotland, but this is difficult to measure

- Stakeholders struggled to talk about the detail of the areas of impact highlighted in the new AHF Theory of Change
- However they were generally clear that AHF is having an impact on communities in Scotland; supporting projects to take on buildings which frequently go on to provide local services of some description, contributing to local communities through job creation, volunteering, the regeneration of place etc.
- Some stakeholders considered that there is only so much impact that AHF can claim

"[It's about community wealth building] about assets in the hands of communities and allowing communities to leverage them … locking in the value and wealth that they create." (Stakeholder 3)

"They have a particular focus on heritage, built heritage that is important to communities and, you know, sometimes that includes non-listed properties, for example … buildings that nevertheless are important to a local community from a heritage perspective, and links to that a strong focus on the role of community owned assets within regeneration and thriving communities." (Stakeholder 4)

"Well, they will make a contribution economically because they are funding projects that hopefully will be more resilient and sustainable and there are jobs connected with that. But I guess you say it would be a secondary economic contribution." (Stakeholder 1)

Source: Stakeholder qualitative interviews

11. What has AHF delivered in Scotland against the AHF Theory of Change impacts?

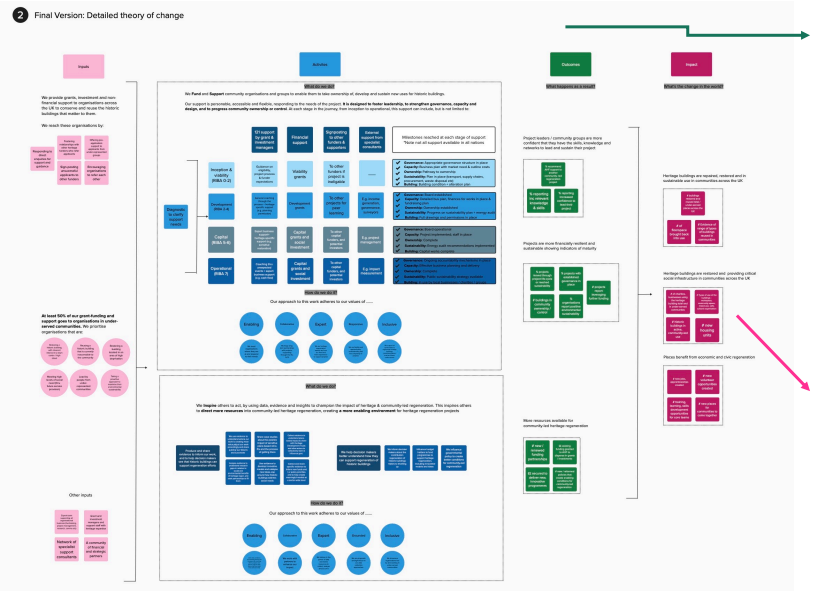
Summary: AHF draft Theory of Change outcomes and impacts

- AHF has recently drafted a Theory of Change in 2024 (see next slide)
- RFA was asked to include questions about the intended outcomes and impacts from this during the qualitative interviews with beneficiaries and stakeholders
- There is evidence that AHF support 2019-2024 is delivering against its intended outcomes
- Hope was expressed that with AHF support 2019-2024, project delivery will lead to the wider TOC impacts; however, most projects were at too early a stage for this to be conclusive and they recognised that AHF would be integral as a catalyst, but not solely responsible for these wider impacts
- Beyond qualitative analysis of the open-ended beneficiary exit survey, RFA also did a key word search, to explore whether beneficiaries spontaneously used the language of AHF's outcomes and impacts when discussing their project achievements and their reasons for satisfaction scores with AHF:
  - For outcomes: confidence / confident (n=13), regeneration (n=13), sustainable (n=12), knowledge (n=5), resilient (n=1)
  - For impacts: sustainable, communities / community / community-led (n=92), social (n=6), economic (n=5), civic (n=1)
- The most frequent words referenced were: communities / community / community-led, regeneration and confident / confidence

"Without the support of AHF with this project Development Grant it is difficult to see how the BCC CIC could have reached this stage of development. Their support, help and advice - including through the current pandemic - has been a long-standing pillar of of our progress since our initial meeting … The critical funding support has assisted us to meet deadlines and overcome obstacles to securing agreement … to transfer the site to our ownership, prepare our plans for its future regeneration and further the repairs to the structure that has enabled that process to complete. AHF's involvement with our project has been exemplary and a model response to assist us with the preservation of a vital part of Scotland and Glasgow's industrial heritage."
(PDG497)

"We are now able to make a stage 2 application to Scottish Land Fund, within the interval up to application determination in November our organisation will seek funding for post acquisition restoration and renovation so that by November we will be in a more informed position as to the long-term sustainability of the project of acquiring and returning the Kilcalmonell Free Church back to community use as a replacement village hall."
(PVG522)

AHF draft Theory of Change



Outcomes
- Project leaders / community groups are more confident that they have the skills, knowledge and networks to lead and sustain their project
- Projects are more financially resilient and sustainable showing indicators of maturity
- More resources available for community-led heritage regeneration

Impacts
- Heritage buildings are repaired, restored and in sustainable use in communities across the UK
- Heritage buildings are restored and providing critical social infrastructure in communities across the UK
- Places benefit from economic and civic regeneration

Source: AHF

Beneficiary interviews and analysis of the exit survey comments provided evidence that AHF is delivering against its intended outcomes

Outcomes
- Project leaders / community groups are more confident that they have the skills, knowledge and networks to lead and sustain their project
- Projects are more financially resilient and sustainable showing indicators of maturity
- More resources available for community-led heritage regeneration

Some beneficiaries talked about being **more confident in their ability to lead and sustain their projects** thanks to the comprehensive support provided by AHF, which included financial assistance, expert advice, capacity building, and enhancing their credibility with other funders

Beneficiaries considered that their projects had become **more financially resilient and sustainable** due to early support from AHF, emergency support and additional support via additional grants or loans, which enabled them to access other funding and continue developing projects

Beneficiaries from community-led projects have benefited from AHF funding and advice which enabled them to leverage other funding sources. This is critical as there has been increased emphasis in Scotland on community led projects due to recent legislative and funding changes e.g. The Community Empowerment (Scotland) Act 2015

"They're very involved now with a lot of community groups, and again, I don't think those community groups would be able to progress with their projects without both the financial support and the advice that they're getting, because they're not project management professionals in most cases … we have seen a switch over the last 10 years, I suppose, to more support for community groups to take over historic buildings and try to develop them. And so, I think AHF has a crucial role to play there in supporting those groups, both with advice and with funding." (Beneficiary 7)

"They were a really essential confidence boost for us back at the beginning, and having AHF support was a massive big deal. And it was that credibility that you could go to other funds and say, 'Well, look, AHF has supported this.' I think now I've become exceedingly tenacious, and I wouldn't give up just because AHF said no." (Beneficiary 3)

Source: Beneficiary qualitative interviews and exit survey

Beneficiary interviews and analysis of the exit survey show that there was hope that AHF support 2019-2024 will contribute to the intended TOC impacts, however most projects were at too early a stage for this to be conclusive

Impacts
- Heritage buildings are repaired, restored and in sustainable use in communities across the UK
- Heritage buildings are restored and providing critical social infrastructure in communities across the UK
- Places benefit from economic and civic regeneration

- Beneficiaries provided examples of the way in which AHF funding and support at early stages (and at times via loans) is **helping to** deliver buildings which it is hoped will be in sustainable use in communities in the future and which will provide critical social infrastructure e.g. Kilmaronock Old Kirk, Forgan Arts Centre, Cumberland Street Station, Leanchoil Hospital.
- Some beneficiaries and stakeholders expressed the belief that this would lead to economic and civic regeneration, and that AHF is playing a contributing role in this along with other funders and organisations who are involved closer to the delivery of final projects.
- Some beneficiaries identified that AHF had already played a role in contributing to economic regeneration by creating job opportunities and volunteering roles through their funding and advice. They perceived that the associated benefits of transforming derelict buildings into functional spaces has helped to boost local economies.

"The criteria for their funding is that you're bringing a building back into productive use. You know, as I say, if we approached them for the mausoleum, they would have said, no, we can't fund that, because it's not changing, it's staying as a mausoleum, but if it's changing a derelict book shop into a hotel, then that's right up their street, and there's about 8 to 10 staff employed and it's boosting the economy of the town centre." (Beneficiary 7)

"It's not all down to AHF. AHF is an absolutely integral part … it's one of these things where, you know, one funder in particular, a credible funder like AHF, can really leverage other funds and persuade them in. So absolutely essential in that. And the impact for us is that we're being able to save [buildings]." (Beneficiary 3)

"In terms of community impact, because the building is delivering a variety of different things, they're all things which are missing in the town and the impact will be high." (Beneficiary 1)

Source: Beneficiary qualitative interviews and exit survey

Stakeholder interviews also provided evidence that AHF is delivering against its intended outcomes

Outcomes

- Project leaders / community groups are more confident that they have the skills, knowledge and networks to lead and sustain their project
- Projects are more financially resilient and sustainable showing indicators of maturity
- More resources available for community-led heritage regeneration

Stakeholders talked broadly about AHF's funding and support **providing communities with the confidence to move forward** with projects. They felt that AHF provides useful expertise, especially for those who may have enthusiasm but lack specific knowledge about heritage buildings or listed properties. This enables them to receive **professional support which helps them to develop their skills and knowledge to lead and sustain projects**. Stakeholders considered AHF to be **well connected and to help projects connect with networks** which can also help them sustain their projects.

Stakeholders considered that AHF's grants and loan funding helped bridge financial gaps and early support often led to further investment from other funders. They perceived that AHF's often long-term commitment to communities and organisations, providing ongoing support, advice, and additional grant/loan funding, **helped projects remain viable and resilient during challenges**. Some stakeholders discussed the importance of leveraging more resources as part of building financial resilience. Whilst they acknowledged that they did not know the specifics of how AHF does this, they considered this to be an essential function for ensuring the sustainability of projects.

Stakeholders considered that AHF was often the catalyst for enabling community-led projects to develop their plans and leverage funding for projects. They considered that AHF had an impact in the way in which it provided advice and promoted partnerships within the heritage and regeneration sector. They perceived that in this way it was helping to provide more resources for community-led heritage regeneration.

"It's having someone to speak to who understands that environment, in particular, the early stage viability grants that they're able to offer to complement our funding and another grant funder's funding and get community groups thinking about a new end use for an existing building and also the gateway into other heritage funding partners." (Stakeholder 7)

Source: Stakeholder qualitative interviews

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Stakeholder interviews also talked broadly about longer term impacts as a result of AHF support, but this was focused at a more general rather than a specific level in comparison with beneficiaries

Impacts

- Heritage buildings are repaired, restored and in sustainable use in communities across the UK
- Heritage buildings are restored and providing critical social infrastructure in communities across the UK
- Places benefit from economic and civic regeneration

Stakeholders perceived AHF to play a part in this, and that they are often a catalyst to these impacts happening, however AHF was not the only funding in the mix; other organisations provide more funding and support which leads to these longer-term, wider impacts.

"Because they're early stage funders, they don't really have the same impact. It's very limited what their impact is, but it's vital. You just need to change, I guess, what your, what your assessment is of an impact because they're not a traditional funder, because they're early stage funding. It's not like evaluating the Lottery … or, you know, Arts & Business Scotland, Culture & Business Scotland. And so it's kind of a different type of impact, I guess, which is probably harder to measure, but no less important." (Stakeholder 2)

"And effectively the ripples they have, I think through these small viability or development grants, it's impressive. Everything from the Northern Isles to the border. And the range of projects from tin sheds, auction marts, churches, schools … The range of things that they're able to support through that lens of community heritage and built heritage is extensive."(Stakeholder 4)

Source: Stakeholder qualitative interviews

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Summary: Perceptions of AHF Theory of Change outcomes and impacts

- **Increased confidence**: some beneficiaries talked about being more confident in their ability to lead and sustain their projects; Stakeholders talked broadly about AHF's funding and support providing communities with the confidence to move forward with projects. They felt that AHF provides useful expertise, especially for those who may have enthusiasm but lack specific knowledge about heritage buildings or listed properties. This enables them to receive professional support which helps them to develop their skills and knowledge to lead and sustain projects
- **Improved financial resilience and sustainability**: Beneficiaries considered that their projects had become more financially resilient and sustainable due to early support from AHF, emergency support and additional support via additional grants or loans, which enabled them to access other funding and continue developing projects. Stakeholders also considered that AHF's grants and loan funding helped projects to bridge financial gaps and that early support often led to further investment from other funders. They perceived that AHF's often long-term commitment to communities and organisations, providing ongoing support, advice, and additional grant/loan funding, helped projects remain viable and resilient during challenges
- **Ability to leverage other funding**: Beneficiaries from community-led projects have benefited from AHF funding and advice which enabled them to leverage other funding sources. Stakeholders considered that AHF was often the catalyst for enabling community-led projects to develop their plans and leverage funding for projects. They considered that AHF had an impact in the way in which it provided advice and promoted partnerships within the heritage and regeneration sector. They perceived that in this way it was helping to provide more resources for community-led heritage regeneration
- **Helping to deliver buildings for sustainable use for benefit of communities:** Beneficiaries provided examples of the way in which AHF funding and support at early stages (and at times via loans) is **helping to** deliver buildings which it is hoped will be in sustainable use in communities and which will provide critical social infrastructure in communities
- **Playing a part in economic and civic regeneration:** Some beneficiaries and stakeholders expressed the belief that this would lead to economic and civic regeneration, however AHF's was perceived in playing a part in this, along with other funders and organisations involved in delivery

Source: Beneficiary and stakeholder qualitative interviews

12. What do stakeholders and beneficiaries think would happen to historic buildings if AHF was not providing funding in Scotland?

Stakeholders considered that if AHF did not exist, less activity would be happening in Scotland

- Stakeholders commented that larger funders would have to spend more time on smaller projects, and that smaller projects themselves would be less able to navigate the heritage funding landscape
- The result would be that smaller, 'riskier' community instigated projects would be less likely to be developed

"So I think things would stop happening because actually it's challenging enough as it is at the moment. I think it would just get all … into the 'too hard' category." (Stakeholder 1)

"I suspect fewer would gain funding from National Lottery anywhere else, first time around. I think there would be a lot of mis-steps because people wouldn't have the understanding of what they should have … I think there would be quite a lot of mistakes by organisations … I think the work would increase for [funders] because they would be seeing things much more often." (Stakeholder 2)

"It's likely that certainly some groups just wouldn't be able to bring forward project ideas … I'm sure some projects wouldn't happen, but the level of investment that goes into heritage I think wouldn't happen as well." (Stakeholder 5)

"I would say if we didn't have the AHF, an awful lot of our smaller, more interesting, more quirky, more risky projects would simply not happen. And while we would still have projects involving large scale public structures, we would lose out on the little churches or the bothies or the boathouses or all these kind of small little ones that are driven by community's love of a particular asset." (Stakeholder 2)

"I mean, you would hope that if they weren't doing it, that someone else would move into that space. But we have seen there's nobody obvious in that early stage, small grant space … that would be an enormous loss, that kind of first stage feasibility funding." (Stakeholder 3)

"There's no kind of magical place that money's going to come from to replace it. You know, and that would also then require, you know, completely unreasonable level of input from volunteers and staff. That's just not manageable in the long term … These projects require so much from individuals … They're far more teetering on the edge of, actually, this project's not going to happen. And then, as you say, it's the much wider social implications in that local area from not having the services that are provided by that place." (Stakeholder 6)

Source: Stakeholder qualitative interviews

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Beneficiaries considered that if AHF did not exist, many old buildings in Scotland would remain dilapidated or be lost entirely

Beneficiaries considered that without AHF's funding, the following impacts on historic buildings would likely occur:

- **Projects would not happen**
  - Many successful projects resulting in restored buildings brought back into use would not have happened without AHF's early support for project viability and development work
- **Delays and increased difficulty in securing funding**
  - Beneficiaries considered that securing funding for a project would have been much more challenging and time-consuming without AHF's quick decision-making and financial support
- **Risk of community groups over-extending**
  - Community groups might take on more than they can handle without AHF's advice and support, potentially leading to difficulties
- **Buildings would remain unrestored**
  - Many historic buildings might be left to deteriorate or remain unused if AHF were not providing critical early stage funding and support

This would lead to missed opportunities for new uses that benefit communities in Scotland.

"I think we would eventually have found other means of funding things, but things would have taken a lot longer. Moments might have been missed, other funders, we might have missed their deadlines, and the particular moment might have been passed where we were able to capture a sort of collection of funding together into being able to take a project forward. So, no, I think absolutely, we're hugely grateful and have depended on AHF support massively." (Beneficiary 3)

"I would think that quite a few projects, successful projects that have ended up with a restored building brought back into use, wouldn't have happened without that early support. And I think there'd be a real risk that community groups would take on more than they can handle and, you know, potentially get into difficulty without the advice." (Beneficiary 7)

Source: Beneficiary qualitative interviews

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Analysis of the open-ended satisfaction explanation in the exit survey provided supporting evidence for the views expressed in the qualitative interviews about the importance of AHF funding to beneficiaries

- **Negative physical impact on buildings:** Without AHF's financial support for viability appraisals and early-stage project development, many historic buildings would have faced increased risk of neglect or deterioration.
- **Negative impact on existing community led projects:**
  - **Difficulty in attracting other funding sources to projects**. Without AHF grants, securing additional funds from other sources would be challenging
  - **Stalled development**: For some projects, AHF funding has been crucial for moving forward with planning applications and organisational development processes like transitioning to SCIO status (e.g. PVG679). Without this support, these development projects could stall or fail to progress
  - **Reduced community engagement and project viability**: AHF grants have enabled deeper community engagement and helped shape clear visions for projects through design sketches and detailed plans (e.g. PVG628). The absence of this support could lead to reduced community involvement and challenges in demonstrating project viability
- **Negative impact on complex building projects**: Organisations like the Scottish Historic Buildings Trust (SHBT), which take on complicated building projects, rely heavily on AHF support for both early project development and cash flow funding during critical stages when no other funder is willing to provide support (PVG150). Without AHF's flexible and understanding approach, delivering these complex projects would become significantly more difficult.

"The grant towards emergency repairs at St Margaret's has been a life-saver for the building, the Braemar community and Historic Churches Scotland. The discovery of unstable masonry at high level on a building at the centre of the village posed an immediate threat to people's safety and the stability of the church tower. Crucially, it also posed a threat to the meanwhile uses taking place in St Margaret's which have reanimated a redundant at risk church, engaged local people, and helped to show how the building can have a viable future. Sources of emergency funding are extremely rare, but the AHF (with the William Grant Foundation) listened, understood the need, and acted quickly to ensure work could go ahead as quickly as possible. The work carried out is necessarily of a temporary nature with an expected life-span of 2 years, but it has bought time for the building and for us - our thanks to the AHF and William Grant Foundation for making this possible."
(PDG561)

Source: Beneficiary exit survey

Beneficiary exit survey verbatim emphasising the importance of AHF support

"AHF's support has enabled the Hall of Clestrain project to move forward at an extremely challenging time, allowing the Society to develop the project to a point where large funders can now be confidently approached for next stage funding. The full time Project Manager's guidance and co-ordination has been fundamental to the success of the development process and the employment of consultants has enabled the production of professional reports, such as the Conservation Plan, to inform and facilitate the next phase. Without AHF's financial and personal support, the project would not be in the same strong and prepared position that they find themselves currently in."
(PDG538)

"We cannot overstate how important support from the AHF has been to realising not only the urgent building repairs required to make the Arts Centre building safe to use, but the entire Craigmillar Now project. We received charitable status for the Craigmillar Now the day before the UK went into lockdown following the Covid-19 pandemic- nearly all sources of funding we had planned to apply to temporarily closed, including the Heritage Lottery Fund and Historic Environment Scotland's funding streams. We had agreed a full repairing lease with our landlords and were at the point where we felt the project would have to be postponed or might not happen at all as securing the funds we needed to safely use the building was starting to feel impossible - then the AHF saved the day! The grant gave us the means and confidence to move forward with our plans. A year later we have partnerships with the Scottish Chamber Orchestra, an exhibition in the Edinburgh Art Festival and have created the first ever home for the Craigmillar archives. We are very grateful to the AHF."
(PDG596)

Source: Beneficiary exit survey

13. How do stakeholders think that AHF's work will meet the needs of Scotland's national Historic Environment Strategy?

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Scotland's national Historic Environment Strategy: 'Our Past Our Future'

Our mission is to sustain and enhance the benefits of Scotland's historic environment, for people and communities now and into the future.

Our Priorities

- Delivering the transition to net zero
- Empowering resilient and inclusive communities and places
- Building a wellbeing economy

Source: Historic Environment Scotland (2023). *Our Past Our Future The Strategy for Scotland's Historic Environment*

Diagram to show the strategy's mission, priorities, and outcomes

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Stakeholders considered that AHF has a key role to play in delivering Scotland's national Historic Environment Strategy: 'Our Past Our Future'

- The three priority areas: *Delivering the transition to net zero*, *Empowering resilient and inclusive communities and places, Building a wellbeing economy* were identified by stakeholders as areas in which AHF is to some extent contributing
- Stakeholders considered that AHF would have a fundamental role in delivering the outcomes of the Our Past, Our Future strategy and indeed that there might be further ways to support the delivery of these objectives working more directly with government

"I think essentially they tick all the boxes. It's that thing of the work they do, supporting projects, both with grants and with the advice, as well as the loans as well. You know, it's hitting all of those targets. For a relatively small amount of funding, they're delivering a huge amount because they're enabling all the groups they're working with to deliver on all of those things." (Stakeholder 6)

"Communities need that boost. They need the boost of professionals coming and speaking to them and saying what you're doing is good and our advice for you is your next steps of this, but also the funding. I mean, AHF have done these studies and people tell us time and again, you know, they get in the community, gets in a pound and it does £10 worth of work in the area, because through that support they're able to get some professional help, get architect drawings, get a member of staff to be able to communicate with the local people, and all of that leverages in more volunteers, more experiences, more training day, skills development for people, and it just boosts and boosts the ripples, go further and further." (Stakeholder 6)

"Potentially it would be interesting to see them work directly with the Scottish Government to deliver on some of its outcomes that we would struggle to deliver on, potentially. And just because their reach is really good as an organisation, they're very well managed and they're good at delivering stuff." (Stakeholder 2)

Source: Stakeholder qualitative interviews

Appendix

Improvements that AHF could make

Beneficiaries suggested several areas where AHF could make improvements:

- **Increase grant amounts**
  - The grant amounts could be reviewed as they often represent a small percentage of what is needed for project development, due to rising costs
  - However, participants were also aware that current support levels are likely appropriate as they are based on available resources
- **Expand funding scope**
  - While the grant terms and conditions were straightforward, having grants available beyond the initial development phase or including construction stages would be beneficial to some projects
  - Having access to additional funding during unforeseen circumstances in construction would have been helpful
- **Simplify grants application process to help organisations which are run by volunteers**
  - For new applicants from volunteer led organisations, the application process could sometimes seem 'fiddly', however they acknowledged that support was available to navigate it. Simplifying this process further could help volunteer organisations who may not have experience with funding mechanisms

- **Proactive outreach and promotion of AHF outside of heritage sector**
  - AHF could be more proactive in promoting itself outside of the heritage sector. Whilst AHF is easy to find 'if you know where to look', it would be beneficial if AHF engaged more with building owners involved in conservation area regeneration schemes (CARS)
- **Greater visibility / promotion as a project funder**
  - While AHF's impact is significant, its contributions might not always be visible to the general community; enhancing communication about the role played by AHF and increasing visibility through logos or acknowledgments on-site could help raise awareness of AHF's contribution

"It's not a problem they can solve, but they obviously need more money." (Beneficiary 7)

"I don't know whether they could maybe be more proactive in, for example, Conservation Area Regeneration schemes. They don't seem to promote themselves a lot outside of the heritage sector." (Beneficiary 3)

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