

The Heritage Alliance
Annual Report and Financial Statements
Year Ended
31 March 2024

Company registration number: 04577804

Charity registration number: 1094793

**The
Heritage
Alliance**



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Reference and Administrative Details

Trustees	<p>Mr P Aiers OBE</p> <p>Ms P E Alexander OBE (passed away 7 April 2023)</p> <p>Rear Admiral RAG Clare CBE DL</p> <p>Dr K O Dabiri (Resigned as Trustee 7 February 2024)</p> <p>Mr D Eiloart (co-opted as Trustee on 28 September 2023, confirmed as Trustee and appointed Treasurer on 7 February 2024)</p> <p>Ms D Kanthavara Madhava (Co-opted as trustee 1 July 2024)</p> <p>Dr C Mahal</p> <p>Mr S M Oates</p> <p>Mr J D Probert</p> <p>Ms A H Purkiss</p> <p>Dr I H Samuel OBE (Acting Chair from 7 April 2023 until 30 June 2024)</p> <p>Mrs C L Souter CBE (Co-opted as trustee 2 May 2024 and appointed Chair on 1 July 2024)</p> <p>Ms K Streeter</p> <p>Mr C M B Sutton (Resigned as Treasurer and Trustee 7 February 2024)</p> <p>Ms J Wills</p>
Secretary	Mrs E Glithero-West
Chief Executive	Mrs E Glithero-West
Principal Office	<p>Church of St Martin Within Ludgate</p> <p>40 Ludgate Hill</p> <p>London EC4M 7DE</p>
The charity is incorporated in England & Wales	
Company Registration Number	04577804
Charity Registration Number	1094793
Solicitors	<p>Bates Wells</p> <p>10 Queen St Place</p> <p>London</p> <p>EC4R 1BE</p>
Bankers	<p>CAF Bank Limited</p> <p>25 Kings Hill Avenue</p> <p>Kings Hill</p> <p>West Malling</p> <p>Kent ME19 4JQ</p>
Independent Examiner	<p>Francis Clark LLP</p> <p>Melville Building East</p> <p>Unit 18, 23 Royal William Yard</p> <p>Plymouth</p> <p>Devon PL1 3GW</p>

Chair's Foreword

This year has been one of significant change in the Board membership of The Heritage Alliance. I must begin by recording my thanks, on behalf of everyone at the Alliance to our wonderful Deputy Chair, Dr Ingrid Samuel, who took the role of Acting Chair for the great majority of the year.

Ingrid will be a very hard act to follow, and I am delighted that she remains with us to provide continuity and wisdom and to continue to Chair the Remuneration Committee. Having taken over as Chair only at the beginning of July this year I can take no credit at all for what the Alliance has achieved during the year on which we are reporting here, which is entirely to the credit of the Board as led by Ingrid and the extraordinary efforts of the staff team to respond to an ever-changing political and economic context and ensure that our members were kept briefed throughout, and that their voices were heard at the national level.



At the time of writing this Foreword, in the early days of a new Government, the new accounting year has already seen considerable political change. 2023-24 was a particularly important year for advocacy with real funding challenges for organisations and local authorities and extensive preparation for the election. The Alliance published a Cost-of-Living report which addressed the impact of funding pressures on the sector; a Heritage Manifesto 2024 in advance of the election which helped focus the debate and was discussed at a hustings event on Heritage Day; analyses of the main political parties' own Manifestos and then a rapid briefing on the outcome of the election. All of these publications were developed and made available with extraordinary speed and accuracy and helped our members and the wider sector marshal their arguments when meeting prospective and then newly elected representatives.

At the Alliance we remain acutely aware of the challenges the sector is facing, as well as the great work that is being delivered up and down the country. We work hard to gather and feed evidence of this work through to Government and to represent our members, their needs and priorities on the Government's Heritage Council and in ongoing conversations at various levels across Parliament and with other sectors. The Heritage Manifesto demonstrates the immense value our sector brings to the economy, society and the environment as well as articulating a set of clear asks to ensure we can continue to do so.

“

It strikes me that the need for an alliance and a voice has never been more important and so we are very grateful for your continued support, engagement and evidence. We are very much in this together – our ever growing and widening membership base adds richness, breadth and heft.

Ingrid Samuel OBE, Acting Chair, 2024 Heritage Alliance AGM

Key highlights of the year

Our advocacy groups have continued to be busy this year, facilitating thinking around issues as diverse as planning, funding, environment, skills and mobile heritage. Thanks to all our members who have contributed to these and other groups grappling with important policy issues. We have collectively seen some considerable advocacy successes - the Levelling Up and Regeneration Act passed into law, including plans to fulfil a long-term ask of the sector: statutory Historic Environment Records, as well as a commitment to launch a consultation on removing the Permitted Development Right for Demolition. We are grateful to Historic England for enabling an evidence desk to run at the Alliance to gather evidence of cost-of-living impacts until June 2023. As a result of this evidence, heritage was categorised as a higher energy industry with associated financial support during the height of the energy crisis.

We continue to represent our members on the Heritage Council and the Historic Environment Forum amongst other fora and we engaged with decision-makers across the political spectrum on the role of heritage in solving a host of policy issues, on changes that will make a difference, and on the outlook for heritage organisations and the particularly challenging funding landscape. To support our collective case, we authored our latest [Heritage Manifesto](#) (2023 and 2024 editions), which members helped to shape through our policy survey and manifesto working group. We have laid out a fresh vision for our sector under the new government, calling on all political parties to put heritage at the heart of policymaking.

Our Budget submissions to the Treasury echoed this manifesto and set out a coherent set of sector-wide fiscal and funding priorities covering the breadth of our membership. Its contents have continued to be part of the case for continuing positive support and investing in our sector. Our Cost of Living report, which followed, harnessed evidence gathered from our members over the previous 18 months to make a compelling case for investment in parts of our sector which were shown to be on the brink of collapse.

In 2023, our team produced 22 high quality and influential summaries, consultation responses and policy papers, documenting an impressive breadth of issues – from hedgerows to heritage railways – showcasing the wide-ranging role of heritage in delivering public good. Our members have continued to give us both sobering evidence and inspiring case studies of great practice, which have all been fed into our regular discussions with decision-makers. Our tiny team of 7 core staff held almost 200 meetings with Arms-Length Bodies, Government and the two Houses of Parliament and we have also met with our members almost 500 times and held 40 advocacy, special interest group meetings and members events. This year we also launched our new International Special Network, building a programme of meetings featuring speakers, case studies and an opportunity for the breadth of heritage to collaborate and exchange. We continued to offer a wide range of expert led offer and events to support our members' resilience.

We also continued this year to support the wider heritage community. We have begun coordination of Carbon Literacy Training on behalf of Historic England for the sector, and we are supporting the work of a Historic England-led AHRC project on Culture and Heritage Capital. Heritage Debate was our best attended on record with a lively discussion on how we can futureproof careers in our sector. Our expert panellists explored early career pathways, volunteering, access and inclusion and skills and training.

We continue to champion the importance of Digital Skills this year sharing the insights we gained through our Heritage Digital projects and DASH Survey at the Museum + Heritage Shows and at the Digital Skills for Heritage Conference in October. We also benefitted from the feedback from the participants to our latest Rebuilding Heritage: Cost-of-Living phase which fed into our insights on the

impact of the Cost-of-Living crisis. We are delighted that our Heritage Funding Directory, generously supported by the Historic Houses Foundation, will receive some transformational investment over the next two years to support organisations further in this space.

Looking ahead, we know that there will be further advocacy needed around planning and the historic environment, the role of heritage in the natural environment and agriculture and around skills. We will keep making the case for the immense value of heritage, look for opportunities for change and spot where inadvertent damage might happen.

We are grateful to our members, colleagues, funders and partners, including our longstanding Corporate Partners: Ecclesiastical Insurance and Bates Wells, and major funders: Historic England, The National Lottery Heritage Fund, Swire Charitable Trust and the Historic Houses Foundation, for their continued engagement and support in challenging financial times. We count over 200 organisations amongst our membership, welcoming 36 new core and affiliate organisations last year. We are proud that our membership makeup is broad and deep and that there is a place, support and role here for the full range of organisations with a passion for heritage. We are working to broaden the voices and perspectives amongst us, including through our growing affiliate membership and also the number of individual sites, academic members and those representing a wide and diverse range of community interests in heritage.

I would also like to take this opportunity, on behalf of my colleagues on the Board, to thank those Trustees who stood down during the year, and those who continue, our volunteers, and in particular to recognise the tireless leadership of our CEO, Lizzie Glithero-West and all the hard working and creative team at the Alliance, as this quote from one of our members shows:

“ Can I take this opportunity to thank you for being such a tireless advocate and champion for us all, and especially for bringing archaeology into the wider heritage fold. Your support and determination has been a game changer.

Quinton Carroll, ALGAO

A handwritten signature in black ink that reads "Carole Souter". The signature is written in a cursive, flowing style with a long, sweeping underline.

Mrs Carole Souter CBE

Trustees' Report

Introduction

The Trustees submit their report and the unaudited financial statements for the year ended 31 March 2024. The accounts have been drawn up in accordance with the appropriate statutory regulations, the company's governing document and Statement of Recommended Practice - Accounting and reporting by Charities (updated 2019) ('SORP'), UK Accounting Standards and the Charities Act 2011.

Background

The Heritage Alliance (formerly Heritage Link) was incorporated on 30 October 2002 under the Companies Act 1985. The company is limited by guarantee and does not have any share capital. Every Member undertakes to contribute such an amount as may be required not exceeding £1 to the charity's assets should it be wound up. The name-change from Heritage Link to The Heritage Alliance registered by Companies House on 19 February 2010, was confirmed by the Charity Commission on 1 April 2010.

Governance

The governing document is the [Memorandum and Articles of Association](#) and the Trustees of the charity are the directors for the purposes of company law. A revised Articles of Association was adopted by Special Resolution dated 6 December 2018.

The Heritage Alliance is a registered charity and company registered in England and Wales. It operates within guidelines approved by the Charity Commission, whereby the Trustees are the decision-making body, but they seek approval for major strategic decisions by members at the Annual General Meeting ("AGM"). Authority to conduct The Heritage Alliance's day-to-day activities is delegated to the Chief Executive Officer, who is responsible for ensuring that the agreed strategy and policies are carried out.

The Chair is appointed by the Board. Trustees are elected by registered members of The Heritage Alliance at the AGM or co-opted during the year by the Trustees at a Board meeting subject to ratification by members at the next AGM.

Ms Pamela Alexander, Heritage Alliance Chair, sadly passed away on 7 April 2023 and Deputy Chair Dr Ingrid Samuel was appointed Acting Chair. Mr Daniel Eiloart was co-opted as a Trustee on 28 September 2023 and then formally appointed 7 February 2024 at the AGM when he was confirmed as Treasurer in succession to Mr Chris Sutton who stepped down.

In Spring 2023 we advertised for a new chair and recruited a further three new Trustees to join us in 2024-2025. We held two drop-in sessions for interested applicants in February and March 2023 which gave insight into the roles and offered the opportunity to speak to current trustees. We interviewed applicants in April 2023. Following this process, on 2 May 2024, Mrs Carole Souter was co-opted as trustee and on 1 July was appointed as our new Chair. New trustee, Ms Deepika Kanthavara Madhava, was also co-opted as trustee on 1 July 2024.

At 31 March 2024, the Trustees, who are also directors, were as follows:

Mr P Aiers OBE, Rear Admiral R Clare CBE DL, Mr D Eiloart, Dr C Mahal, Mr S M Oates, Mr J Probert, Ms A H Purkiss, Dr I H Samuel OBE (Acting Chair), Ms K Streeter, Ms J Wills.

The Board met formally in May, July, December 2023 and February 2024 with an extended strategic review session preceding the December 2023 meeting.

Objectives and Activities

The objectives of the charity as set out in the Memorandum and Articles of Association are:

1. For the benefit of the public:
 - 1.1. To improve the efficient and effective fulfilment by heritage charities (as defined in the Articles of Association) of their objects; and
 - 1.2. To promote the efficient application of resources for charitable purposes by non-charitable institutions and organisations especially those established for purposes concerned with the protection, preservation, improvement, enhancement and/or revitalisation of the historic environment (as defined in the Articles of Association);
2. The advancement of education of the public:
 - 2.1. In relation to historical and/or architectural significance of buildings and/or sites; and
 - 2.2. By promoting and encouraging public access to, study and appreciation of, the historic environment.

The Trustees of The Heritage Alliance confirm that the purposes of the organisation are recognised as Charitable pursuant to the Charities Act 2011 and have considered the Charity Commission's guidance on public benefit in planning the charity's activities. The Trustees believe that there are clear and identifiable public benefits arising from the pursuit of The Heritage Alliance's aims and objectives, and that its activities benefit the organisations it works with and supports and the wider general public.

Strategy 2021-2026

Our Vision

Our vision is for a society in which England's historic environment and wider cultural heritage is valued, supported and able to enrich everyone's lives. We believe this can be achieved through the sympathetic, sustainable and imaginative stewardship of the past around us by a vibrant, independent heritage sector that is fit for the future.

Our Mission

We harness the skills, strengths and talents of our broad and diverse membership, partners and the wider sector to:

- champion the independent heritage sector to policy makers and opinion formers, convening a wide range of stakeholders to build a shared, deep and nuanced understanding of the importance and value of all kinds of heritage; and

Over the next 5 years, the Alliance will ensure the sector emerges from the Covid-19 crisis inspired and equipped to be better than ever before.

We will focus on 4 interrelated strategic objectives:

-  **Advocacy**
-  **Communicating & Connecting**
-  **Sustainability & Resilience**
-  **Insight**





Strategy 2021 - 2026

- inspire and catalyse action, supporting independent heritage organisations to achieve their full potential through enhanced sustainability, resilience and capabilities, and enabling networking and shared learning amongst practitioners across the sector.

As set out in our Strategy, The Heritage Alliance is working to realise our shared sector vision and ensure the sector continues to re-emerge from the Covid-19 crisis, inspired and equipped to be better than ever before. We are focusing our efforts on four interrelated strategic objectives: **advocacy; communicating and connecting; building sustainability and resilience; and developing insight.** The full strategy, developed during 2020 and published on 9 March 2022, can be found here: <https://www.theheritagealliance.org.uk/about/our-strategy>.

The organisation will soon commence work on the production of a renewed strategy beyond 2026.

Membership

The Heritage Alliance membership ranges from national bodies to specialist charities and community organisations, across the breadth of the sector, from museums, conservation and archaeology to science and construction.

Core Membership is primarily open to charitable and not-for-profit organisations that are within or involved with the heritage sector and benefitting from our diverse networks and advocacy work championing the independent heritage sector.

Affiliate Membership is designed primarily for commercial organisations interested in tapping into the Alliance’s extensive networks and insights and offering their expertise to the Alliance’s core membership.

Whilst only organisations can be members of the Heritage Alliance, the **Individual Supporter Patronage Scheme** enables individuals to be part of the Heritage Alliance network and support its activities.

Members' Activities:

Heritage Alliance Members benefit from a number of groups, networks and events as well as communications exclusively available to them.

Advocacy Groups:

- Rural Heritage
- Spatial Planning (Sponsored by The Chartered Institute for Archaeology)
- Funding and Investment
- Mobile Heritage
- Skills, Education and Engagement

Working Groups:

- Tax

Our Members Events and Networks

Advocacy and Working Groups



Spatial Planning



Rural Heritage



Mobile Heritage



Funding and Investment



Skills, Education and Engagement



Tax Working Group

Special-Interest Networks



Archaeology



International



CEO Peer-to-Peer

Members Events



Meet and Greet



Expert-Led Sessions



HR Clinics

The Heritage Alliance's Advocacy and Working Groups track relevant parliamentary business, including the progress of Parliamentary bills, debates, questions and EDMs, making representation as appropriate. They support the development of policy and legislation by providing written and oral evidence to Select Committee inquiries and Government consultations. Group membership is only available to Heritage Alliance core members whilst affiliate members can request to join as a means of connecting with our members and sharing their expertise across the sector.

Special Interest Networks:

- Archaeology
- International (Sponsored by Heriot Watt University)
- CEO Peer Support

Special Interest Networks aim to build communities and knowledge-sharing amongst Alliance members with shared heritage interests. Regular network meetings provide a dedicated space for sharing expertise, resources, and mutual support, and they allow the Heritage Alliance to stay updated on the latest developments in these specialist areas.



Image: Reopening of St Peter's Sudbury as Sudbury Arts Centre, following restoration works carried out by the Churches Conservation Trust (Heritage Alliance member)

Other Members' Events:

- Members' Meet and Greet (Sponsored by Circle Insurance)
- Expert-led Sessions
- HR Clinics (Sponsored by Bates Wells)

In addition, we offer a range of skills-sharing and networking opportunities throughout the year.

The Historic Religious Building Alliance (HRBA) is a distinct non-legal entity with its own membership, housed within and overseen by the Heritage Alliance, bringing together those working for a secure future for historic religious buildings. Further information concerning the activities of the HRBA may be found [here](#).

Communications Activities

Heritage Update – our fortnightly newsletter, supported by the Historic Houses Foundation, providing key sector and government news, events and jobs for the heritage sector.

Exclusive members' mailing list – providing in-depth insights into the policy landscape from the Heritage Alliance CEO.

Website – platform giving free access to our publications, briefings, event content, news and jobs as well as providing key information about the Heritage Alliance.

The Alliance website supports project websites and online resources for the sector, including:

Heritage Funding Directory: Heritage funding sources available (co-managed with Architectural Heritage Fund and funded by the Historic Houses Foundation);

Rebuilding Heritage: National Lottery Heritage Fund funded sector-support project on COVID specific support;

Heritage Digital: National Lottery Heritage Fund funded sector-support project on digital skills for the heritage sector;

The Historic Environment Forum (Funded by Historic England and managed by The Heritage Alliance);

Digital Heritage Hub: National Lottery Heritage Fund-funded directory of resources (managed by Arts Marketing Association) for which we led the 'Finding, sharing and creating digital content' section;

Social media – providing insights to the sector, sharing government news, and sharing member news on [Twitter/X](#) and [LinkedIn](#).

Ongoing Sector Support Projects:

The Heritage Alliance works in partnership to inspire, lead and build the capabilities of our members and the wider sector to be more sustainable and resilient. Major support programmes this year included:



Rebuilding Heritage, funded by the National Lottery Heritage Fund, started in September 2020 offering targeted support to help heritage organisations to respond to the challenges of the Covid-19 pandemic with fundraising, business planning, legal, leadership and communications support. The project was extended until May 2023 to provide support for heritage organisations facing the Cost-of-Living Crisis.



Innovation: Explore (Feb 2023-Aug 2023). We received funding through an Innovation Grant from the National Lottery Heritage Fund to research the heritage sector's access to business support information, looking specifically at signposting behaviour by sector support organisations and how we can help to make sharing and finding trusted information easier.



Carbon Literacy Training (Feb 2024-Dec 2024). We promote and coordinate Carbon Literacy training courses, specifically designed for the heritage sector. The course helps heritage organisations to improve their awareness of carbon consumption and of the individual steps they can take to reduce their emissions and become more environmentally sustainable. The training was created and funded by Historic England (with development support from Historic Buildings & Places).



Heritage Funding Directory: A database of Heritage funding sources available nationally and internationally, co-managed with the Architectural Heritage Fund and funded by the Historic Houses Foundation. The Directory's domestic entries were completely updated during 2022 as part of the Rebuilding Heritage extension. An update of the international entries is underway.



The Historic Environment Forum (HEF), funded by Historic England and managed by The Heritage Alliance, brings together senior members of staff from public and non-government bodies to work collaboratively on strategic matters for the historic environment sector in England.

Achievements and Performance 2023-24 - In Numbers

 **14**

ADVOCACY GROUP MEETINGS CONVENED

171

MEETINGS WITH GOVERNMENT AND ALBs



12 

CONSULTATION RESPONSES DELIVERED

10 POLICY DOCUMENTS OR SUMMARIES PUBLISHED 

HERITAGE UPDATE CELEBRATED ITS **500TH** EDITION 

HERITAGE MANIFESTO LAUNCH REACHED

66k VIEWS

& OVER 150 SHARES ON SOCIAL MEDIA 

43.23%

HERITAGE UPDATE'S OPEN RATE, FAR ABOVE THE INDUSTRY STANDARDS

NEARLY

40k

FOLLOWERS ACROSS OUR SOCIAL MEDIA CHANNELS (TWITTER/X, LINKEDIN)



79

EXCLUSIVE COMMUNICATIONS WERE SENT TO MEMBERS



26

MEMBERS AND SECTOR NETWORKING EVENTS AND ROUNDTABLES OFFERED



36

NEW CORE AND AFFILIATE MEMBERS. MILESTONE REACHED OF 200 MEMBERS



OVER THE LAST THREE YEARS, THE HERITAGE ALLIANCE'S PUBLIC SECTOR SUPPORT PROGRAMMES HAVE SUPPORTED OVER

5.4k PARTICIPANTS & **2.5k** ORGANISATIONS 

493

MEETINGS HELD WITH HERITAGE ALLIANCE MEMBERS



1. Advocacy

We will champion the needs and aspirations of the independent sector, persuading others, both private and public organisations, to support our specific policy objectives for the benefit of the sector and society at large.

The Heritage Alliance is the membership body representing the breadth of the heritage movement in England, with over 200 members by the end of March 2024. We hold a powerful and unique role promoting and championing the independent sector in all its diversity. We are also uniquely placed to coordinate sector views, capture members' knowledge and help policy makers realise the potential of heritage, reflected in our seats on the Heritage Council, Historic Environment Forum and other groups.

The Alliance engages in thought leadership and briefs opinion-formers, on the value of heritage, its potential to solve a host of public policy problems and the contribution that independent heritage organisations make to contemporary society. The Acting Chair, Chief Executive and policy team continue to take a leading role in promoting this message with senior figures in government, Parliament, the heritage sector, other related sectors, and the business community. Our advocacy groups act as a known and respected mechanism for heritage organisations to develop coherent and coordinated advocacy thinking to share with decision-makers and with their members and networks.

“As the umbrella organisation for several sectors across heritage, the Heritage Alliance is focussed on advocating for all heritage with government and other key stakeholders and, as such, acts for all of us rather than each individual sector having to disparately advocate and lobby individually. The united approach and voice adds knowledge, strength and impact.”

Member Survey 2023



Image: The Rt Hon. Baroness Thornton showing the Heritage Alliance's Manifesto during the Heritage Hustings Panel at Heritage Day.

The Heritage Manifesto 2024

Heritage is the background and the bedrock of Britain; it is everywhere and benefits everyone. It breathes life into our towns, cities, coasts, and countryside, telling our nation's stories and creating places that people want to live and invest in. If properly supported, heritage can pave the way to achieving net zero, regenerating communities, improving our wellbeing, and powering a green skills revolution.

2.5%
GVA

England's heritage industry produces a GVA impact of £45.1bn - more than the defence sector



Tourists spend £18bn on heritage trips each year, and 7 of our top 10 attractions are museums and heritage sites



99% of us live within a mile of a listed place and 75% say the government has a moral duty to protect heritage

TO REALISE THE POWER OF HERITAGE, WE CALL ON THE NEXT GOVERNMENT TO...



Put heritage at the heart of regeneration

Invest in and empower councils and communities so they can protect and make the most of heritage locally. This should include support for targeted regeneration schemes, removing permitted development on demolition, incentivising reuse, and embedding culture-led regeneration and community ownership in future housing and community strategies.



Embed the historic environment in climate action

Ensure Environmental Land Management schemes (ELMS) provide robust long-term funding to land managers of at least £4.4bn a year (delivering heritage outcomes on an equal footing), reform EPCs, and bring forward skills training, funding, standards, and advice in a National Retrofit Strategy.



Reform the tax regime to incentivise repair

Equalise VAT on repair and maintenance with newbuild, simplify and reduce the burden of business rates, and continue support for the Listed Places of Worship Grant Scheme.



Harness cultural learning and skills

Encourage youth visits to heritage sites in the curriculum through subsidised entries, implement cross-subsidised shared apprenticeship schemes, reform the Apprenticeship Levy, and offer unsponsored conservation skill-oriented visas for heritage.



Futureproof heritage at every level

Ensure the adequate funding and continued stability of arms-length bodies, deliver a new Culture Growth Fund, protect the 20% share of Lottery funding for the National Lottery Heritage Fund, support local authority arts and conservation teams with ringfenced investment, and safeguard the uncertain futures of mobile and archaeological collections.



The Heritage Alliance

The Heritage Alliance is England's largest coalition of heritage interests. It brings together over 200 independent heritage organisations covering the full breadth of heritage. Between them, over 7 million volunteers, trustees, members and staff demonstrate the strength and commitment of the independent heritage movement. The Heritage Alliance is ready to put our resources and expertise at the disposal of all decision-makers to secure the best future for England, built on its invaluable past.

The Heritage Alliance, St Martin Ludgate, Ludgate Hill, London EC4M 7DE. www.theheritagealliance.org.uk; @heritage_ngos. The Heritage Alliance is a company limited by guarantee in England and Wales no 4577804 and a registered charity no 1094793. Images c. English Heritage

The voice of England's independent heritage movement

Image: Manifesto 2024, 1-pager.

The asks from the breadth of the Heritage Sector are united under our Heritage Manifesto which gives a clear message around 5 pillars to Parliament and Government

“ We support the @Heritage_NGOs new #HeritageManifesto2023 launched today ‘Heritage is a living and breathing part of our everyday economy – from canals and railways to high streets and theatres.’ We couldn’t agree more, and it’s why we are campaigning to #KeepCanalsAlive

Tweet by Canal and River Trust

We are uniquely placed to distil asks from around the breadth of heritage, and now over 200 members, into a coherent and independent message for policy and decision makers. In July, we published our Heritage Manifesto 2023, following an extensive consultation of the asks and needs of the heritage sector. The release of the manifesto received over 66,000 interactions on social media and saw dozens of heritage organisations endorsing it publicly. We then equipped the sector with an “advocacy toolkit” to utilise the manifesto and more effectively advocate with local MPs. A refreshed version was later published in Spring 2024, the [Heritage Manifesto 2024](#), that included relevant new data from the latest iteration of Heritage Counts from Historic England and our most recent findings from the Cost-of-Living Crisis and updated some of the policy asks for the spring 2024 context.

Our Heritage Manifesto provides a clear and single banner for our sector to unite itself behind, saving organisations of all sizes time, and providing the smaller parts of our sector with a voice. For decision-makers, it provides an easy digest and set of priorities to engage with, focused around 5 areas: regeneration, climate action, tax, cultural learning & skills, and futureproofing the sector with sustained funding. We followed the release of each manifesto with 720 letters to decision-makers and politicians. This has resulted in our busy parliamentary engagement programme from the autumn-winter until the spring and saw all major parties engaging with the Heritage Alliance to understand how heritage can be a positive solution to their public policy problems. An additional benefit to our work was the significant engagement with our flagship event, Heritage Day, from politicians and decision-makers.

The breadth of the Heritage Sector is ably represented by the Heritage Alliance at the Heritage Council and in the Historic Environment Forum, including the Sector’s Resilience Plan

We continued to be an active participant at the Heritage Council this year. This gave us a platform at the heart of discussions between Government and the heritage sector to champion the part of our membership who themselves are not directly represented around the table. We spoke or engaged with key items around fiscal incentives on the repair and maintenance of historic buildings in the context of net zero; and measures to improve protections for mobile and marine heritage. We also continued to be an active contributor to the [Heritage Sector Resilience Plan \(coordinated by the Historic Environment Forum\)](#) and the [Heritage Counts Overview](#) of what the sector achieved over a twelve-month period.

Heritage Day provided an important platform for decision-makers and politicians to engage with the sector

“ I am very glad to be attending Heritage Day and to have the opportunity to engage with so many of the brilliant people who work and volunteer across the country to celebrate, protect, and share our extraordinary heritage.

Heritage Minister, Lord Parkinson of Whitley Bay at Heritage Day on 7 March

Our largest public event, Heritage Day, which took place on the 7 March, offered heritage leaders, staff, and volunteers a unique forum to hear from decision-makers. The Heritage Minister, Lord Parkinson of Whitley Bay; our CEO Lizzie Glithero-West; and the new chair of Historic England, Lord Neil Mendoza CBE; delivered vibrant addresses to the sector, celebrating the value of heritage for economic growth, wellbeing, placemaking and community benefit. They also answered questions from the floor, fostering important dialogue with heritage organisations. In addition, a dynamic ‘Heritage Hustings’ saw representatives from across the political spectrum look ahead to the general election and discuss the place of heritage in their party’s vision.



Image: Heritage Minister, Lord Stephen Parkinson of Whitley Bay during his keynote speech.



Image: Dr Ingrid Samuel OBE, Philip Nelson, The Rt Hon. Baroness Thornton, The Rt Hon. Lord Tom McNally, and The Rt Hon. Lord Ed Vaizey of Didcot during the Heritage Hustings Panel.

Our advocacy activities resulted in increased support for the Heritage Sector across several policy priorities

This year again, we were the conduit for a multitude of voices from the sector, to support policymakers to protect heritage and understand its benefit for society. For example, we supported our members with several amendments to the Levelling Up and Regeneration Bill which led to the Government tabling their own amendment relating to places of worship and promising a consultation on removing permitted development for demolition from historic building stock.

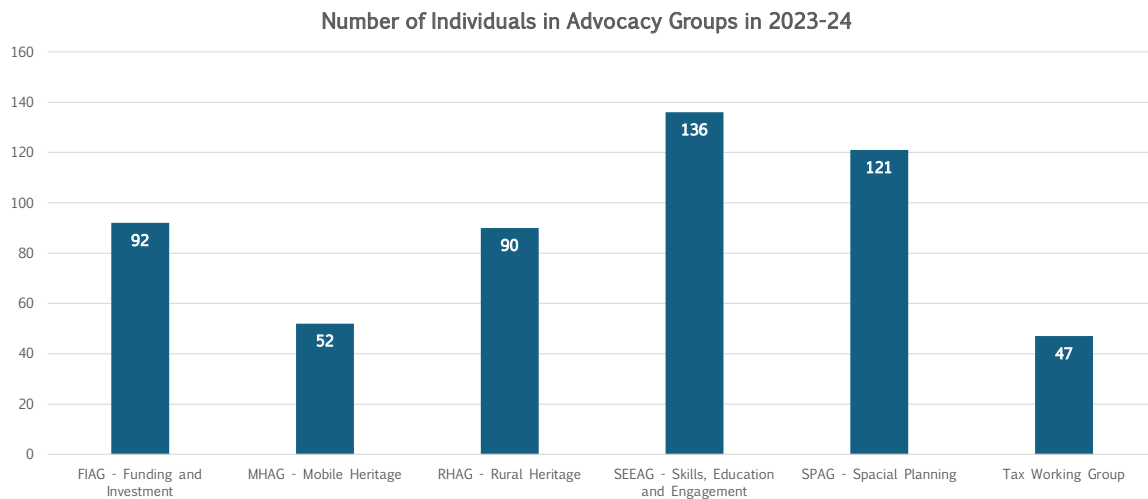
We also provided feedback to DCMS to recommend changes to the Energy Bills Discount Scheme in early 2023 which excluded many heritage organisations by relying on a registration with a specific SIC code, which many sites such as cathedrals, museums and stately homes did not have. As a result of our involvement, amongst others, the scheme was amended so that organisations with the incorrect SIC code could supply additional evidence to prove eligibility.

We shared evidence with Creative UK for their response to the British Film and TV consultation, addressed to the CMS Committee. Using key findings from our [‘Inspiring Creativity, Heritage & The Creative Industries’](#) report, we highlighted how Heritage underpins the UK film and TV industry exports, the skills deficit in the cultural sector and made wider arguments around the importance of preservation of heritage backdrops, key to creative productions.

Finally, we produced a same-day briefing on the Autumn King’s Speech and the Spring Budget, picking out their relevance to the heritage sector for our members, and produced two short-turnaround briefings for the Shadow Culture team on Net Zero and Cost-of-Living impacts, enhancing our reputation as a ‘go-to’ organisation for policy and decision-makers.

Advocacy Groups: a key mechanism for membership engagement and advocacy development

The Alliance draws on its membership for their knowledge and expertise to influence legislation, policy and guidance. Members’ shared interests are served by the five Advocacy Groups - Spatial Planning; Funding and Investment; Skills, Education and Engagement; Rural Heritage; and Mobile; and one working group focused on fiscal incentives. These groups, set out above, operate as the Alliance’s primary advisory bodies on policy issues by preparing consultation responses, proactive advocacy pieces and acting as information-sharing forums that bring in the expertise of external stakeholders on more specialist issues. The volunteer support generated by the advocacy groups alone is estimated to be over 2,240 hours (a value of £112,000).



Our Advocacy Groups provide an agile and responsive mechanism to gather critical evidence for policymakers

Throughout the year, a recurrent theme was the capacity of our advocacy groups to gather, at pace, views from across the sector. For example, our Skills Education and Engagement advocacy group (SEEAG) provided evidence and statistics for a response to the Migration Advisory Committee’s Shortage Occupation Lists Consultation in May 23. In June, the Rural Heritage Advocacy Group (RHAG) met to discuss views on the Department for Levelling Up, Housing and Communities’ Environmental Outcomes Report consultation and drafted a joint response which reflected the majority view on the issues it raised. The group’s work also supported briefing for our CEO as she was interviewed by DEFRA on the Sustainable Farming Incentive scheme evaluation.

Ahead of the summer 2023 Heritage Council, we hosted a session of our Tax Working Group to support our VAT Campaign. Our members' evidence informed both the Historic Environment Forum's presentation and Heritage Alliance contributions to the discussion at the Heritage Council, and supported new briefings on VAT and Heritage and Sustainability, which supported DCMS research in this space.

Later in the year, our Spatial Planning Advocacy (SPAG) was able to convene at short notice in response to the Department for Levelling Up, Housing and Communities' announcements around long-term plans for housing. This urgent discussion provided an easy mechanism for stakeholders across the sector, from archaeology and built environment, to skills and landscape, to review the impact of the announcements. The thinking from the advocacy group later fed into responses to two consultations on Permitted Development Rights and Local Plan Making.

Our Advocacy Groups offer a time-saving conduit to the sector for Arms-Length Bodies and Funders

In addition to how they advance policy thinking, our advocacy groups can act as a time-saving conduit to the sector for Arms-Length Bodies and Funders. This is a key reason why Historic England has staff appointed as observers in all our advocacy groups. We provided, for instance, important introductions between the Mobile Heritage Advocacy Group (MHAG) chairs and the National Lottery Heritage Fund's new Industrial, Mobile and Transport team leads. As the mobile heritage is vulnerable (as our Rebuilding Heritage initial findings showcased) and can be harder to connect due to its often volunteer-run nature, this was a valuable engagement opportunity. Knowledge from this group also prepared us to represent the sector at speed when a special Heritage Council was called earlier this year focused on rail and marine heritage. The DCMS and the MOD memorandum of understanding on underwater cultural heritage is now being considered for extension in discussion with other relevant government departments.

In the autumn we invited the Historic England team to present highlights of the newly published [Heritage Counts: Heritage and the Economy](#) at our Funding and Investment Advocacy Group (FIAG). The session also reviewed the impact of the Autumn Statement which was just released.

2. Communicating and Connecting

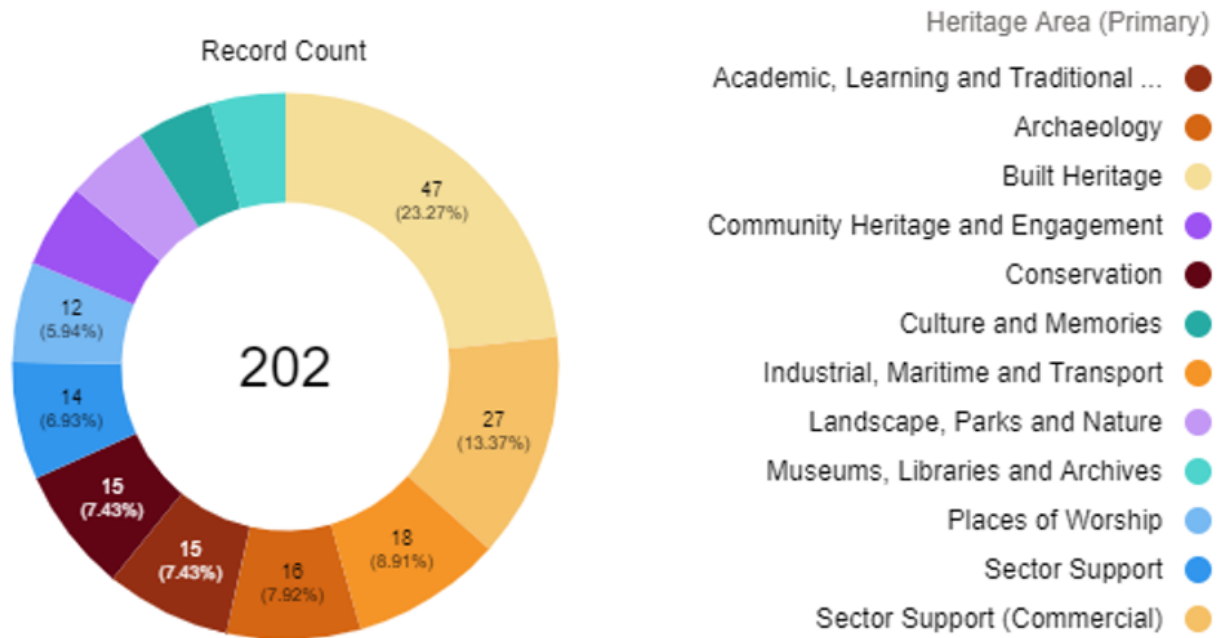
We will maintain and develop high quality information resources on policy, good practice and research. We will broker networking and collaboration within and beyond the sector to catalyse new ways of working, support shared learning and skills/career development; and promote the importance and value of the sector.

Our growing membership is engaging all parts of the sector with greater regional presence:

“The opportunities to meet members is unlike other organisations; it’s in a safe, inclusive and informal setting allowing participants to speak freely and build genuine relationships.”
Member Survey 2023

The Heritage Alliance gained 36 new organisational members in 2023-24, including a number of academic bodies, umbrella bodies as well as several local and regional organisations. This enables us to gain better perspectives outside of London and continue to foster connections and collaboration across the breadth of the heritage sector.

Details of our current membership (as of March 2024)



Primary area of interest of Heritage Alliance members.

We provided high quality information to record numbers of followers from the sector

We maintained our high-quality information services to the sector, through Heritage Update, our fortnightly newsletter reaching 16,000 inboxes, and our social media engagement, with nearly 40,000 followers across our channels, and 63,000 followers if we include the followers of the Alliance’s Senior Team (on X and LinkedIn). In addition, The Heritage Alliance membership benefitted from insights throughout the year through our fortnightly CEO’s members emails.



Our fortnightly newsletter Heritage Update, sponsored by Historic Houses Foundation, continues to provide a vital means of communicating important guidance from Government and key sector bodies, and is valued by sector and decision-makers alike. It is also an important platform for our members to showcase their own achievements and news, supporting knowledge sharing across the sector. Engagement with the newsletter hit new record open rates this year compared to the previous year, rates significantly above the industry standard. This suggests that a large proportion of our subscribers continue to actively use Heritage Update as their primary source of relevant news around heritage.

Sharing opportunities, training, events and vacancies with members and the wider sector has always been a key role for our newsletter. Due to the extent of its reach, Heritage Update is a perfect tool to help circulate opportunities to as many people as possible. These include events, courses, consultations, volunteering opportunities and salaried vacancies.

Heritage Day 2024 Celebrates the Power of Collaboration

Heritage Day 2024 took place on 7 March. Nearly 300 Heritage leaders, professionals and volunteers gathered online and in-person at the historic venue, St. John’s Church Waterloo. Panels, workshops, case studies, keynote speeches and an awards ceremony all focused on ‘The Power of Collaboration’.

The **Heritage Minister Lord Parkinson of Whitley Bay** delivered a keynote speech to the sector. Speaking ahead of the event, he said:

“ I am very glad to be attending Heritage Day and to have the opportunity to engage with so many of the brilliant people who work and volunteer across the country to celebrate, protect, and share our extraordinary heritage. The Heritage Alliance does amazing work bringing people together to share ideas and insights, champion our heritage heroes, and speak with a strong voice about what the sector needs – for the sake of the millions of people who benefit from its work today, as well as for the sake of future generations.

A dynamic **'Heritage Hustings'** saw representatives from across the political spectrum look ahead to the general election and discuss the place of heritage in their party's vision. **'Finding Common Ground'** welcomed representatives from the creative industries, construction and environmental sectors to discuss how heritage can add value to growth industries and support public policy priorities. Delegates had the opportunity to choose from an array of workshops, tours and networking sessions, and afternoon discussions included a session focused on **'Future-Ready Heritage'** which explored themes of innovation and inclusivity.

The **Chair of Historic England Lord Neil Mendoza CBE**, in his first year at the organisation, reflected in his keynote speech that

“ *The heritage sector thrives through collective action and the power of collaboration – together, and with people and places. There is increasing recognition of the vital importance of heritage and culture for the nation – for economic growth, jobs, places, for our well-being and, of course, for our happiness. Creativity and heritage go hand in hand to foster pride in place, connect communities and boost economic growth.* ”



Image: Lord Neil Mendoza, Chair of Historic England, delivering his keynote speech at Heritage Day.

Our CEO, Lizzie Glithero-West, unpacked our Heritage Manifesto. She reflected on ‘a time of opportunity for heritage’:

“ We can and should remain chipper. In the last couple of years, heritage has received an investment – the message is getting through that heritage is central a host of policy areas. The future for our sector matters, because what we do matters to society, environment, to wellbeing, creativity and good decision-making. And if you look at yesterday’s Budget – to productivity and the economy too.

The day culminated with the presentation of the annual **Ecclesiastical Heritage Heroes Awards**, now in its 14th year, which celebrates the significant contribution of heritage volunteers to the whole sector.

Improved knowledge sharing between Heritage Alliance Members and the wider sector utilising international connections

“ I just wanted to say that was one of the most enlightening, engaging and useful groups I’ve attended in a while. Very ‘fresh’ on issues. Loved it!
Dr Hana Morel, FSA, RESCUE

In July 2023, we launched a new [special interest network](#) (thanks to the sponsorship of Herriot Watt University) for organisations with international interests. It followed a successful model we have used for organisations with an archaeology focus (which also runs quarterly). The group garnered a lot of

Which 3 main countries are you engaged with (outside the UK)?

37 responses



Image: Results from a swift survey at one of the sessions of our international special interest network.

attention from Heritage Alliance's members (with 63 organisations signing up), keen to connect with others in the sector who are engaged internationally. Discussions enabled the mapping of current concerns and opportunities around international working and subsequently the creation of a content programme with speakers (including AHRC and British Council) for the other quarterly sessions this year covering topics ranging from funding to cultural diplomacy. This demonstrated the unique position of the Heritage Alliance to provide a space for peer-learning and knowledge-exchange across the sector.

In January we also published the evaluation of the [International Travel Grant Scheme](#), a collaboration between the Heritage Alliance and the British Council, which took place in 2019. The report, through case studies, reflections and recommendations highlighted the benefits to unlock international connections to enhance the resilience of UK and partner organisations, providing new creative opportunities and helping to grow audiences.

Our communications channels showcased important case studies from the sector

Our fortnightly newsletter, Heritage Update, continues to provide the sector with news, guidance, events but also positive case studies from Heritage Alliance Members demonstrating the connection between heritage and public policy priorities.

Our Social Media Channels were also a useful conduit connecting our insight reports to current events. For example, we linked the City of London Mayor's article on Heritage and Soft Power to our International Report and the Heritage, Health and Wellbeing Report to Mental Health Awareness Week.

Sector research such as the DASH Survey identified that providing peer-perspectives is a preferred method for the heritage workforce to learn and innovate. We are uniquely placed to provide this angle, through our close relationship with our members from across the breadth of the sector.

Ecclesiastical's Heritage Heroes Awards showcase the impact of heritage volunteers

This year's, the presentation of the annual awards, now in its 14th year, showcased all shortlisted entries in a video '*Why do Heritage Volunteers matter?*'. The Ecclesiastical Heritage Hero 2023 title was awarded to the Tyne Theatre & Opera House Performance Research Volunteers. The group gathered and reviewed over 23,000 images of newspaper adverts, programmes and day-bills to create a performance database covering 52 years of the Tyne Theatre & Opera House's history. The Clifton Suspension Bridge Volunteer Hard Hat Tour Guides were awarded the Ecclesiastical Heritage Collaboration 2023 Award. The group lead hard hat tours into the Leigh Woods Abutments – a series of twelve vaulted chambers supporting the structure of Brunel's Victorian suspension bridge.



Image: Presentation of the Ecclesiastical Heritage Heroes Awards at Heritage Day.



Image: One of the canals managed by the Canal & River Trust (Heritage Alliance member).

Historic Environment Forum (HEF) continues to provide a valuable collaborative forum, gathering the voices of sector leaders on key topical challenges.

Historic Environment Forum (HEF) carries out valuable collaborative work gathering the voices of sector leaders on key topical challenges, acting as a high-level forum, funded by Historic England and managed by The Heritage Alliance on behalf of the sector, to enable collaborative working on strategic matters for the historic environment sector in England. HEF has continued to carry out this work during 2023-24.

In partnership with Historic England, the HEF published the Heritage Sector Resilience Plan in June 2022. This set out a coordinated sector plan relating to the themes of skills, business planning and governance, climate change, diversity and inclusion, and embedding heritage in wider public policy. Priority actions were identified for the sector to deliver, working in partnership, and the HEF continues to oversee their delivery. The HEF continued to facilitate the sector’s contribution to the Heritage Council, and has continued to meet regularly with DCMS staff, operating as an important conduit between the sector and Government on a range of topical issues.

The HEF Sustainability and Climate Change Task Group completed its work to bring HEF and non-HEF members together to share learning on heritage and net zero. A new related HEF Topic Group was established to continue to provide a unique space for heritage organisations to discuss relevant challenges and solutions. The task group produced a set of widely shared net zero tools and resources designed to support heritage organisations to navigate the net zero landscape. A new HEF Task Group was established to work on green skills in heritage with the aim of connecting heritage jobs/careers to the green jobs market. This was one of the priority actions agreed in the HEF Resilience Plan.

3.Sustainability and Resilience

Building on our insights into the sector’s distinctive needs we will work in partnership with others to inspire and grow the capabilities of our members, the wider sector and the Heritage Alliance itself to be more sustainable and resilient.



A new Heritage Alliance Report equips Heritage Sector Support Bodies to share business resources more effectively

In October 2023, we shared [the findings](#) of our National Lottery Heritage Fund-supported *Innovation: Explore Grant* where we delved into the heritage sector’s access to business support information, looking specifically at signposting behaviour by sector support organisations and how the Heritage Alliance can help to make sharing and finding trusted information easier. We tested whether a regional lens was needed as a solution, as well as mapping barriers to access and articulating 6 key design principles important to our sector. These findings were shared with sector-support bodies within our membership and the wider sector to enable them, individually as well as a community, to support the wider sector’s sustainability through easier wayfinding of available support.

What have we discovered?

A variety of methods are being used to signpost business support information across the sector



There is common ground in the issues experienced nationally and the North East

4

Four primary barriers to access



6

Six design principles that could help to shape solutions and improve future access.

We turned theory into practice by using our insights to shape practical support delivered by skills experts

“

Really enjoyed the governance session led by @Minervasearch which encouraged us to think about the impact we deliver as Board members, not just the skills we bring. Also discussed the importance of a competent Chair & considered opportunity (not risk) registers #HeritageDay2024

Tweet about Inclusive Governance session at Heritage Day

Whilst new major sector-support programmes are currently in hiatus as we explore new funding opportunities, we also continued to offer practical support through curated Expert-Led sessions open to our members from HR clinics to sessions on Copyright, as well as practical workshops and resources as part of our public events. For example, Heritage Day featured a workshop on inclusive governance, hosted by Minerva Search and ‘Advocacy: 101’ empowering heritage organisations to develop their advocacy activities, in a session led by the Heritage Alliance’s Head of Policy and a DCMS representative.

By partnering with skill experts or, when appropriate, leading these sessions ourselves, we turn the insights we gain from the sector into relevant and valued training and guidance, providing the sector with the tools it needs to face its current challenges. We also supported shared learning through some of our networking and peer-groups. For example, our CEO ‘Cuppa and Chat’ peer group is a valued group with a set of regular attendees who share challenges and advice in confidence, and through the group have access to a group of leaders across the sector who may feel isolated due to the smaller and separate nature of small heritage charities.

Our public events play an important role in furthering discussion around Equality, Diversity and Inclusion in the heritage sector

“ A powerful and uplifting session at #HeritageDay2024 @Heritage_NGOs on *Opening Up the Sector*. Fostering conversations on #ability not #disability, #inclusion not #exclusion.

Tweet about our EDI panel at Heritage Day

This year again, we continued to use our public events to raise awareness, present broader perspectives and grow the sector’s confidence in taking forward action to diversify the heritage workforce and its audiences. For example, our panel ‘*Opening Up the Sector*’ reflected on the importance of dialogue rather than avoidance through fear of saying the wrong thing and offered vibrant lived experiences. Feedback from attendees showed they appreciated the session’s discussion on ways to remove barriers and engage underrepresented groups.

Earlier this year, our annual [Heritage Debate](#) (sponsored by our corporate partner Ecclesiastical Insurance) highlighted the ties between the workforce’s pipeline and the broadening of our sector. Karis Morris-Brown, Workforce Development Manager at Black Cultural Archives advocated for widening access to heritage careers and advancing inclusion in the workforce. She argued, “*If the sector is serious about widening access and inclusion, it doesn’t stop with entry to the workforce, there is a responsibility to ensure there is equity for all throughout their careers.*” Izabella Maar, Heriot Watt



Image: Our Panel ‘*Opening Up the Sector*’ at Heritage Day 2024, featuring Karis Morris-Brown, George Knight, Stephen Oates, Moe Horikawa, and Steven Mifsud MBE.



Image: 'Crown to Couture' exhibition at Kensington Palace.

Graduate and Heritage Trainee at the Heritage Trust Network advocated for creating early career pathways and opportunities for students and graduates. Audiences were challenged in how they approach both recruitment and career progression and which practical actions organisations can take to become more accessible.

The Heritage Funding Directory continues to be a widely used resource for the sector

“ I use the Heritage Funding Directory periodically to provide advice to community groups on sources of heritage funding.

Craig McHugh, Kirklees Planning

The Heritage Funding Directory, supported by the Historic Houses Foundation, continues to be utilised as a resource for organisations of all sizes, from across the breadth of heritage, providing them with essential support to identify funding sources.

This year, following the significant funders' data review in 2022 and internal changes within our team, we focused on maintaining the current platform, bringing our new Communications and Office teams up to speed with the resources and associated processes and updating the international entries of the directory. We continue to receive support from our partner the Architectural Heritage Fund, who respond

to enquiries from users about sources of funding. Toward the end of the year, we initiated the integration of the international funding directory into the main directory. This will make any international funders searchable and more accessible than they currently are as they sit in a separate PDF.

We have also started to shape further our thinking around the future of the platform, engaging a number of new prospective funders and partners into this conversation. Thanks to a new grant from Historic Houses Foundation, we will begin an upgrade of the platform in 2024-25 to make the directory more accessible and easier-to-use.

4. Insight

We will develop and use our high quality, evidence-based insights into the sector and its value, impact, needs and aspirations, to lead innovation, enhance our advocacy and communications, and to support the sustainability, resilience and vibrancy of the sector.

Insight-sharing in sector and members' events, catalyse innovation and empower heritage organisations to take action

This year, we played an active role in high-profile sector events to share the insights we are constantly gathering on the sector. In Spring, our team shared key findings at the Museums + Heritage Show and our CEO spoke about the political & policy outlook at the Historic Religious Building Alliance's Big Update. These engagement opportunities provide up-to-date advocacy knowledge with easy-to-digest findings and sector-wide perspectives. In the Summer, our CEO also played an important role as ambassador for the sector at the National Federation of Builders' conference and the B'nai B'rith Jewish Heritage Days, covering the opportunities for heritage as a solution to public policy problems and unpacked the Heritage Manifesto for use by all as a tool to advocate collectively as a sector. She also spoke at the Historic England and Council for British Archaeology-led Wellbeing Conference at Delapré Abbey, joining a panel of policy professionals to discuss the advocacy space around wellbeing issues.

In the autumn, we were a key contributor to the National Lottery Heritage Fund's "Digital skills for Heritage Conference", coordinating 4 sessions. As part of the keynote address, the Heritage Alliance's CEO shared the journey the sector took embedding digital skills since 2020 as well as showcasing inspiring examples of innovative practice from the sector. Later, our Head of Development chaired a panel offering practical and empowering advice for heritage organisations to engage with digital no matter the size of their organisation or their budget.

Throughout the year our policy team regularly attends sector forums and wider industry events as an ambassador for heritage and to share insights from our membership, advocacy and projects. These include the Creative UK Trade Body Network, the Better Planning Coalition and WhatNext Culture. We also convene a 6-weekly 'UK Wide Heritage Chat' to share updates and insights from the four nations. We hold a formal role on Historic England's Culture and Heritage Capital Working Group to support and advise the project on its engagement and communication with the breadth of the heritage sector.



Image: Keynote panel of the “Digital Skills for Heritage” Conference featuring our CEO Lizzie Glithero-West (credit: Arts Marketing Association).

Finally, our own public events, Heritage Debate and Heritage Day were a unique platform for us and others to share key insights to the sector (as is detailed elsewhere in this report). Analysis of the post-event feedback showed that attendees appreciated the variety of topics and speakers, which exposed them to new ideas and perspectives that could help inform their future thinking and strategies.

Heritage Debate brings the future of viable careers to the forefront of the sector’s thinking

In November, our annual Heritage Debate “*Careers at a Crossroads: How Can We Futureproof the Heritage Workforce?*” stimulated a lively discussion on how careers in heritage can be made viable and rewarding into the future. A panel of experts discussed improved pay, diversity and inclusion, promotion of heritage skills, supporting volunteers, and early career pathways, as well as reflecting on the strengths of the heritage sector and the passion and generosity of its people. In addition, nearly twenty Heritage professionals wrote a ‘*Letter to a Younger Self*’ to share the learnings they made in their own journey. These letters are published on the [programme page](#). As result, the heritage sector gained a range of perspectives on the future of Heritage to equip their organisations and the wider community with strategic and practical recommendations to ensure viable careers remain a priority.

Policymakers, Funders, Decision-Makers and the Heritage Sector are better informed on the impact of the Cost-of-Living Crisis as a result of our insights.

“ This report offers a helpful insight into the current state of the heritage sector. At Historic England, we are committed to continuing to fund research that helps us to understand the impact of the financial challenges for the heritage sector and offers potential solutions to secure its future.
 Duncan Wilson, CEO, Historic England

Since October 2022, we have been conducting ongoing research into the impact of the cost-of-living crisis on the heritage sector. The Cost-of-Living Data Desk (October 2022-June 2023), funded by Historic England, provided valuable insights into how the crisis was affecting the sector and equipped us and Historic England with evidence to ensure that part of the heritage sector was classified as higher energy industries and therefore eligible for financial support. In tandem, the findings from the third phase of Rebuilding Heritage focused on the Cost-of-Living crisis, accessible publicly, strengthened the quality of insights with very practical steps and pathways for the sector to navigate the crisis.

In the autumn of 2023 further survey work by The Heritage Alliance mapped the evolution of a range of challenges for the sector. The autumn results revealed that the biggest issue was overwhelmingly reported as funding, with a ‘cost of giving’ crisis being cited cross the charity sector. The Heritage Alliance Team shared these findings with policymakers, funders, and decision makers, equipping them with better insights to advocate on behalf of the sector. A final report including a set of recommendations was published in May 2024: ‘On The Brink: Heritage in the Cost of Living Crisis’.

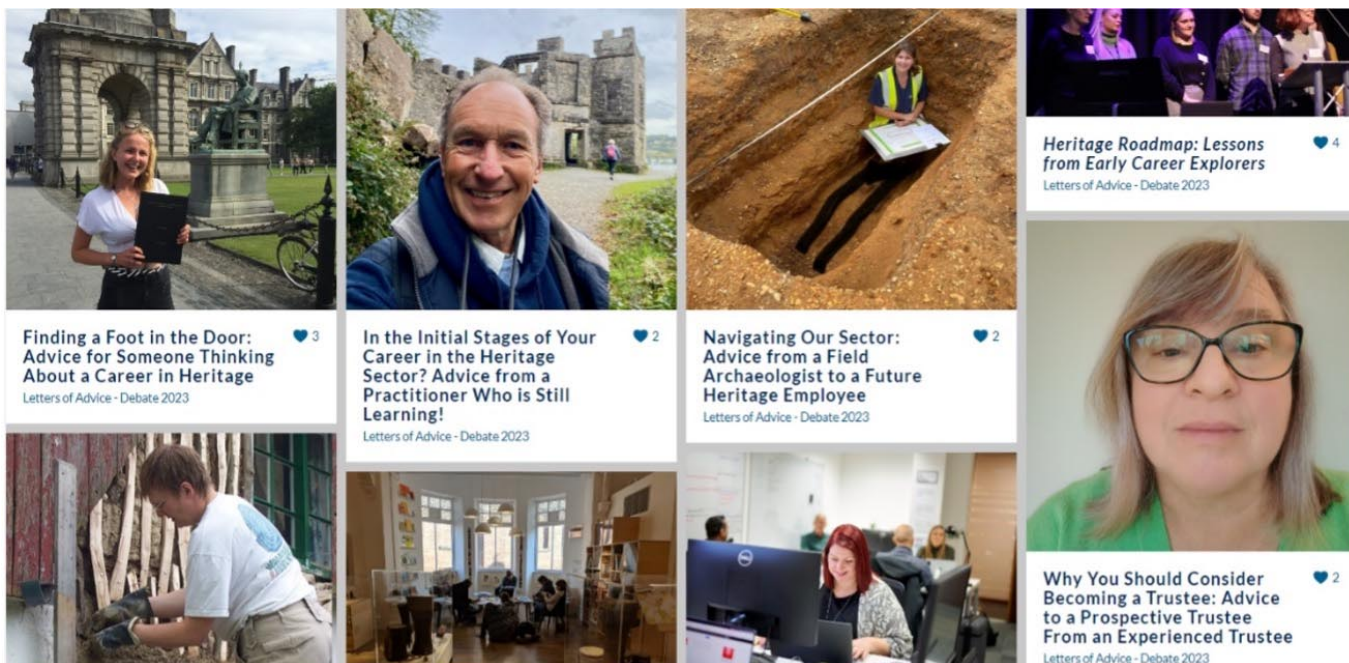


Image: Selection of ‘Letters to Younger Self’ available on the Heritage Debate 2023 Webpage

Image: Photos taken by CEO Lizzie Glithero-West visiting the founder of Heritage Fuels Alliance (Heritage Alliance member).



Our interactions with Decision-Makers and the Sector ensure that our insights are grounded in real-time evidence

During this financial year, we met almost 500 times with our members and gathered over 500 responses across our surveys. This gave us real-time perspectives from the breadth of the sector throughout the year. In addition, our interactions with Government and Arm-length bodies remained high and valuable on both sides with real-time evidence on sector concerns being shared to inform support initiatives. In 2023-24 we held 171 meetings with Government, Parliament and Arms-Length Bodies. Meetings ranged from the formal Heritage Council and stakeholder engagement on environmental land management and educational reform, to more informal engagements on topics ranging from energy efficiency targets and planning to skills shortages and cost of living impacts. In recognition of the value of the insights the Alliance continues to collect from members and the wider sector, fortnightly meetings were held between our policy leads and DCMS officials allowing increased data sharing and relationship building, alongside more senior-level regular catch ups.

List of Publications, Consultation Responses, Summaries and Briefings

Publications

- Evaluation Report: International Travel Grant Scheme – run by the Heritage Alliance in 2019 and funded by the British Council (Jan 2023)
- Heritage Manifesto (July 2023)
- Heritage Alliance Innovation: Improving Access to Business Support Information (Oct 2023)
- The Heritage Alliance’s Annual Report and Accounts 2022-23 (Jan 2024)
- Heritage Manifesto 2024 (Mar 2024)



Image: Photo taken by CEO Lizzie Glithero-West at our member Delapré Abbey during a visit.

Consultation and Responses

- Shortage Occupation Lists (Migration Advisory Committee, May 2023)
- Environment Outcome Report (DEFRA, June 2023)
- Protecting Hedgerows (DEFRA, September 2023)
- Permitted Development Rights Reform (DLUHC, September 2023)
- British Film and TV (DCMS Select Committee – October 2023)
- Urban Green Spaces (DEFRA Select Committee - October 2023)
- Local Plan Making Reforms (DLUHC - October 2023)
- Autumn Statement Representation (HM Treasury - November 2023)
- Young People and the Built Environment (DLUHC Committee, January 2024)
- Intangible Cultural Heritage (DCMS, February 2024)
- Brownfield Land (DLUHC, March 2024)

Summaries, Briefings and Reports

- Value of Heritage Rail (April 2023)
- Autumn Statement Briefing (November 2023)
- Spring Budget Member Briefing (February 2024)

Public Speeches (By Date)

- **“From Firefighting to Future Resilience: how are current crises shaping the sector?”** at the Museum + Heritage Show 2023 (Lizzie Glithero-West and Delphine Jasmin-Belisle, 10 May 2023)
- Participation in panel at the Oxford Heritage Network Annual conference on **‘What’s Next for Heritage and Innovation?’** (Lizzie Glithero-West, 7 June 2023)
- **“2023: Political Turmoil & Heritage: an insider’s view from here to the election”** at HRBA Big Update (Lizzie Glithero-West, 14 June 2023)
- **“The Heritage Manifesto: Built Environment, Planning, and Decarbonisation”** At the National Federation of Builders Sustainable Conservation conference (Lizzie Glithero-West, 7 September 2023)
- **“Heritage, The Long Game”** at the B’nai B’rith Jewish Days 2023 (Lizzie Glithero-West, 27 September 2023)



Image: Photo of the Duck Island Cottage in St James's Park, home of the Heritage Alliance member London Parks & Gardens.

- **“Welcome to Reflect, Share, Inspire – Digital Skills for Heritage”** at the Digital Skills for Heritage Conference (Lizzie Glithero-West, 18 October 2023)
- **“Digital on a shoestring – panel session”** At the Digital Skills for Heritage Conference (Delphine Jasmin-Belisle, 18 October 2023)
- **“Chair’s Address”** at Heritage Alliance AGM (Dr Ingrid Samuel OBE, 7 February 2024)
- **“The Year Ahead”** at Heritage Day (Lizzie Glithero-West, 7 March 2024)
- **“Advocacy 101”** at Heritage Day (Lydia Gibson, 7 March 2024)

Financial Review

The Statement of Financial Activities on page 48 shows total income for the organisation of £553,545, of which £265,455 was restricted income and £288,090 was unrestricted.

Unrestricted income was £45,389 higher than the previous year, due to increased event income of £21,973, increased membership fees of £13,799 (as membership volumes continue to grow and subscription fees increase to offset inflationary pressures), securing additional sponsorship income of £10,400 (as our sponsor offer and marketing each strengthen), increased deposit interest of £6,169 (attributable to the wider raised interest economic landscape), higher advertising income of £1,360, offset by a reduction in grant income of £8,338 (in line with our planned reduction in long term capacity building grant funding schedule from Historic England, due for renewal next year).

Restricted income was £204,808 lower than the previous year, predominantly due to a reduction in project delivery income of £192,220. Additional income of £26,277 from increased HEF income and income from the Cost-of-Living project, bolstered by the newly awarded Carbon Literacy project, was offset by a loss of year-on-year project income of £147,412 as the Rebuilding Heritage project wound down, coupled with an aggregate of loss £83,710 as several other smaller projects had concluded (Digital Innovation, DASH, Digital Academy, and Resilience). There was also a reduction in restricted fund event income of £11,740. Project income by its very nature is uneven and unpredictable, depending upon the project funding bid and award cycles set by project commissioners, so volatility of this kind is not unusual in this area. We are starting to see the commencement of a fresh cycle across the coming 18 months which we anticipate will lead to the award of a fresh projects. The organisation is set up in such a way that the consequences of any marked drop off in project activity, which impact via a loss of core management fees charged out to projects, is tolerable without putting the core organisation at risk of failure.

Unrestricted costs increased by a total of £70,226, impacted by greater investment in staff costs, particularly in the Membership and Development Function and the back office, a full year of premises occupancy costs versus a partial year in 2022/23, higher event costs as our event delivery evolved (reflected in materially higher event income), and inevitably significant inflation across all cost lines in line with the wider spike in inflation across the economy.

Governance costs are £4,343, predominantly comprising the cost of Independent Examination, as well reimbursed travel and accommodation expenses of trustees in connection with attendance at meetings. Project contributions to overheads were £67,919 compared to £110,368 in 2022/23, consistent with the reduction in project activity in this year compared to the previous year, explained more fully above. These charges relate to the management and support services we provide to projects from the Core team.

The net surplus for the year on unrestricted funds was £775, down from £68,061 the previous year. This reduction is largely a consequence of loss of contribution to the core cost base as project activity shrank, as well as higher costs as outlined above. It is expected that the volume of externally funded projects delivered in 2024/25 will be comparable with those in 2023/24. A budget has been adopted for 2024/25 showing a small surplus of £12,996, which would keep us compliant with our reserves

policy. Trustees recognise that the financial sustainability of the organisation is an ongoing challenge and implementing more sophisticated reporting and planning measures to ensure that we are best able to plan effectively and to ensure that medium term income and expenditure is appropriately calibrated.

Reserve Policy

Free reserves represent the total reserves available to the charity less those whose uses are restricted to specific purposes. The Charity's policy is to hold nine months' worth of core costs as reserves being deemed sufficient to enable the Alliance to meet its charitable and operational commitments in the event of a significant shortfall in income or the occurrence of significant operational risk. At the balance sheet date, free reserves totalled £337,882, being 98.05% of the estimated core expenditure for 2024/25 of £344,603, equivalent to 11.8 months' core costs.

Investments

The only investments held by the organisation are in the form of an interest-bearing deposit account. Cash balances in excess of current operating requirements mainly represents the holding of free reserves and are invested solely within the Charities Aid Foundation Gold deposit account to ensure their availability at short notice and to minimise any risk of depletion of capital value. The investment policy is reviewed by the Board from time to time to ensure a satisfactory return is achieved balanced against investment risk, with the organisation committed to a very low risk strategy.

Fundraising

The Heritage Alliance operates as a business-to-business organisation. Aside from institutional grant applications, its fundraising is primarily directed at current and potential member organisations and corporate partners, to generate membership subscriptions and sponsorship. Other fees are raised for event attendance and for advertising job vacancies. There are a small number of individual supporters, who typically decide to make a donation after attending a Heritage Alliance event. The Heritage Alliance does not actively seek out individual supporters for donations. No complaints have been received about any aspect of the Heritage Alliance's fundraising.

Corporate Partners, Sponsors and Donors

We would like to thank:

Our two corporate partners:

- **Ecclesiastical**; and
- **Bates Wells** for their continued support of the Heritage Alliance this year;

Our main funders:

- **Historic England** for their national capacity grant funding and support for the Cost-of-Living data desk;
- the **National Lottery Heritage Fund** for their significant support for various programmes including Rebuilding Heritage and Heritage Innovation; and
- **Historic Houses Foundation**
- **Swire Charitable Trust**
- **Marsh Charitable Trust**

And the following organisations for their valued support and sponsorship this year:

We continue to be grateful to **Cifa** for their sponsorship of our Spatial Planning Advocacy Group, the **National Trust** for their annual donation, and we also welcome the generous support of new sponsors **Heriot-Watt University** and **Circle Insurance** who sponsored special members networks. We also want to thank our events Sponsors in the last twelve months: **Farcroft Restoration Groups, Minerva Search, UK Heritage Pulse, Architecture Heritage Fund** and **Direct Access**.

We are also grateful to Affiliate Members offering generous pro-bono support to our members: **The Philanthropy Company, Tricolor Associates, CFD Landscape & Heritage, Arcade, LeLay Architects, Circle Insurance, Humap, Tree-V, Utility Aid, Give a Little, Naomi Korn Associates, Saltways** and all our affiliate members who supported our expert-led members events.

The annual report was approved by the trustees of the charity on 11/12/24 and signed on its behalf by:

Carole Souter
Carole Souter (Dec 11, 2024 15:32 GMT)

Mrs Carole Souter CBE

Chair

Statement of trustees' responsibilities

The trustees (who are also the directors of The Heritage Alliance for the purposes of company law) are responsible for preparing the trustees' report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice), including FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland".

Company law requires the trustees to prepare financial statements for each financial year. Under company law the trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the state of affairs of the parent charitable company and the group and of the incoming resources and application of resources, including its income and expenditure, of the charitable group for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards, comprising FRS 102 have been followed, subject to any material departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the parent charitable company will continue in business.

The trustees are responsible for keeping proper accounting records that can disclose with reasonable accuracy at any time the financial position of the parent charitable company and the group and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the parent charitable company and the group and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

The annual report was approved by the trustees of the charity on 11/12/24 and signed on its behalf by:


Carole Souter (Dec 11, 2024 15:32 GMT)

Mrs Carole Souter CBE

Chair

Independent Examiner's Report

I report to the charity trustees on my examination of the consolidated accounts of the Group comprising The Heritage Alliance and its subsidiary undertakings for the year ended 31 March 2024.

Responsibilities and basis of report

As the trustees of the group and also its directors for the purposes of company law you are responsible for the preparation of the consolidated accounts of The Heritage Alliance in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of The Heritage Alliance are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of the consolidated accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

An independent examination does not involve gathering all the evidence that would be required in an audit and consequently does not cover all the matters that an auditor considers in giving their opinion on the accounts. The planning and conduct of an audit goes beyond the limited assurance that an independent examination can provide. Consequently, I express no opinion as to whether the consolidated accounts present a 'true and fair' view and my report is limited to those specific matters set out in the independent examiner's statement.

Independent examiner's statement

Since the Group's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of the Institute of Chartered Accountants in England and Wales, which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe:

1. accounting records were not kept in respect of The Heritage Alliance as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination; or

4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities [applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)].

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed by:

46B3E0E5E022404.....

Duncan Leslie (FCA)
the Institute of Chartered Accountants in England and Wales

Melville Building East
Unit 18, 23 Royal William Yard Plymouth
Devon PL1 3GW

18 December 2024
Date2024

Consolidated Statement of Financial Activities

(Including Consolidated Income and Expenditure Account and Statement of Recognised Gains and Losses)

Year Ended 31 March 2024

	Note	Unrestricted funds £	Restricted funds £	Total 2024 £
Income and Endowments from:				
Donations and legacies	3	5,025	-	5,025
Charitable activities	4	274,557	265,455	540,012
Investment income	5	8,508	-	8,508
Total income		<u>288,090</u>	<u>265,455</u>	<u>553,545</u>
Expenditure on:				
Charitable activities	6	(355,234)	(192,212)	(547,446)
Total expenditure		<u>(355,234)</u>	<u>(192,212)</u>	<u>(547,446)</u>
Net (expenditure)/income		(67,144)	73,243	6,099
Transfers between funds		67,919	(67,919)	-
Net movement in funds		<u>775</u>	<u>5,324</u>	<u>6,099</u>
Reconciliation of funds				
Total funds brought forward		337,107	32,649	369,756
Total funds carried forward	15	<u>337,882</u>	<u>37,973</u>	<u>375,855</u>

Consolidated Financial Statements

(Including Consolidated Income and Expenditure Account and Statement of Recognised Gains and Losses)

Year Ended 31 March 2023

For comparative purposes

	Note	Unrestricted funds £	Restricted funds £	Total 2023 £
Income and Endowments from:				
Donations and legacies	3	5,012	30	5,042
Charitable activities	4	235,350	470,233	705,583
Investment income	5	2,339	-	2,339
Total income		<u>242,701</u>	<u>470,263</u>	<u>712,964</u>
Expenditure on:				
Charitable activities	6	(285,008)	(353,080)	(638,088)
Total expenditure		<u>(285,008)</u>	<u>(353,080)</u>	<u>(638,088)</u>
Net (expenditure)/income		(42,307)	117,183	74,876
Transfers between funds		<u>110,368</u>	<u>(110,368)</u>	-
Net movement in funds		68,061	6,815	74,876
Reconciliation of funds				
Total funds brought forward		269,046	25,834	294,880
Total funds carried forward	15	<u>337,107</u>	<u>32,649</u>	<u>369,756</u>

All of the group's activities derive from continuing operations during the above two periods.

Consolidated Balance Sheet

31 March 2024

	Note	2024 £	2023 £
Current assets			
Debtors	12	40,413	30,289
Cash at bank and in hand		471,198	462,499
		<u>511,611</u>	<u>492,788</u>
Creditors: Amounts falling due within one year	13	<u>(135,756)</u>	<u>(123,032)</u>
Net assets		<u>375,855</u>	<u>369,756</u>
Funds of the group:			
Restricted income funds			
Restricted funds		37,973	32,649
Unrestricted income funds			
Unrestricted funds		<u>337,882</u>	<u>337,107</u>
Total funds	15	<u>375,855</u>	<u>369,756</u>

The financial statements on pages 48 to 66 were approved by the trustees, and authorised for issue on 11/12/24..... and signed on their behalf by:

Carole Souter

Carole Souter (Dec 11, 2024 15:32 GMT)

Mrs Carole Souter CBE

Chair

Balance Sheet

31 March 2024

	Note	2024 £	2023 £
Fixed assets			
Investments		1	1
Current assets			
Debtors	12	40,412	30,288
Cash at bank and in hand		471,198	462,499
		<u>511,610</u>	<u>492,787</u>
Creditors: Amounts falling due within one year	13	(135,756)	(123,032)
Net current assets		<u>375,854</u>	<u>369,755</u>
Net assets		<u>375,855</u>	<u>369,756</u>
Funds of the charity:			
Restricted income funds			
Restricted funds		37,973	32,649
Unrestricted income funds			
Unrestricted funds		337,882	337,107
Total funds	15	<u>375,855</u>	<u>369,756</u>

For the year ending 31 March 2024 the company was entitled to exemption under section 477 of the Companies Act 2006 relating to small companies. The members have not required the company to obtain an audit in accordance with section 476 of the Companies Act 2006. The directors acknowledge their responsibility for complying with the requirements of the Act with respect to accounting records and for the preparation of accounts. These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies regime. The company has taken the exemption in section 408 of the Companies Act 2006 and has not presented its individual Statement of Financial Activities. The company’s net movement in funds for the financial year was £6,099 (2023 - £74,876).

The net movement in funds of the charity is the same as the group.

The financial statements on pages 48 to 66 were approved by the trustees and authorised for issue on 11/12/24..... and signed on their behalf by:

Carole Souter
Carole Souter (Dec 11, 2024 15:32 GMT)

Mrs Carole Souter CBE
 Chair

Statement of Cash Flows

31 March 2024

	Note	2024 £	2023 £
Cash flows from operating activities			
Net income for the year		6,099	74,876
Working capital adjustments			
Decrease in stocks		-	120
Increase in debtors	12	(10,124)	(10,911)
Increase/(decrease) in creditors	13	30,603	(32,747)
(Decrease)/increase in deferred income		(17,879)	26,568
Net cash flows from operating activities		<u>8,699</u>	<u>57,906</u>
Net increase in cash and cash equivalents		8,699	57,906
Cash and cash equivalents at 1 April 2023		<u>462,499</u>	<u>404,593</u>
Cash and cash equivalents at 31 March 2024		<u>471,198</u>	<u>462,499</u>

All of the cash flows are derived from continuing operations during the above two periods.

Notes to the Financial Statements

1. Charity status

The charity is limited by guarantee, incorporated in England & Wales, and consequently does not have share capital. Each of the members is liable to contribute an amount not exceeding £1 towards the assets of the charity in the event of liquidation.

The address of its registered office is:

St Martin Ludgate
Ludgate Hill
London
England
EC4M 7DE

2. Accounting Policies

Summary of significant accounting policies and key accounting estimates

The principal accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all the years presented, unless otherwise stated.

Statement of compliance

The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019) - (Charities SORP (FRS 102)). They also comply with the Companies Act 2006 and Charities Act 2011.

Basis of preparation

The Heritage Alliance meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy notes.

Going concern

The trustees consider that there are no material uncertainties about the group's ability to continue as a going concern nor any significant areas of uncertainty that affect the carrying value of assets held by the group. The recent financial performance and position has been discussed in the Trustees' Report. The accounts are prepared on the going concern basis.

Judgements and key sources of estimation uncertainty

In the application of the charity's accounting policies, which are described in this note, management is required to make judgements, estimates and assumptions about the carrying value of assets and liabilities that are not readily apparent from other sources. The estimates and underlying assumptions are based on historically known factors and experience. Therefore, management do not perceive there to be any critical areas of judgement or key sources of estimation uncertainty in the formulation of the financial statements.

Any estimates and underlying assumptions used by management such as depreciation rates are reviewed on an ongoing basis. Any revision deemed to be required to any accounting estimates would be recognised in the period in which the estimate is revised if the revision affects only that period or in the period of the revision and future periods if the revision affects both current and future periods.

Income and endowments

All income (except membership fees) is recognised once the charity has entitlement to the income, it is probable that the income will be received, and the amount of the income receivable can be measured reliably.

Deferred income

Deferred income represents amounts received for future periods and is released to incoming resources in the period for which, it has been received. Such income is only deferred when:

- The donor specifies that the grant or donation must only be used in future accounting periods; or
- The donor has imposed conditions which must be met before the charity has unconditional entitlement; or
- Membership fees for the full calendar year are deferred to spread across the financial years they apply to. Similarly, where unrestricted grants or donations are received from donors who stipulate that the grant or donation covers a certain time period, such income is spread across financial years in accordance with the donor's stipulations.

Investment income

Bank interest is accounted for on a receivable basis, as are grants from funders.

Charitable activities

Subscriptions are based on a calendar year and are accounted for on a receivable basis. Therefore, three quarters of the income received from these subscriptions has been deferred until the 2023/24 financial year.

Expenditure

All expenditure directly relating to the objectives of the charity is included in Charitable Activities. Support costs represent expenditure incurred in the management of the charity's activities. Expenditure which cannot be allocated directly is apportioned on the basis of staff time.

Charitable activities

Charitable expenditure comprises those costs incurred by the charity in the delivery of its activities and services for its beneficiaries. It includes both costs that can be allocated directly to such activities and those costs of an indirect nature necessary to support them.

Support costs

Support costs include central functions and have been allocated to activity cost categories on a basis consistent with the use of resources.

Governance costs

Governance costs relate to the direct costs associated with the constitutional and statutory requirements of the Alliance and include the costs of the independent examination and other constitutional related costs.

Taxation

The charity is considered to pass the tests set out in Paragraph 1 Schedule 6 of the Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes. Accordingly, the charity is potentially exempt from taxation in respect of income or capital gains received within categories covered by Chapter 3 Part 11 of the Corporation Tax Act 2010 or Section 256 of the Taxation of Chargeable Gains Act 1992, to the extent that such income or gains are applied exclusively to charitable purposes.

Tangible fixed assets

Individual fixed assets costing £1,000 or more are initially recorded at cost, less any subsequent accumulated depreciation and subsequent accumulated impairment losses.

Depreciation and amortisation

Depreciation is provided on tangible fixed assets so as to write off the cost or valuation, less any estimated residual value, over their expected useful economic life.

Fixed asset investments

At year end the charity owned all of the issued ordinary share capital, consisting of 1 ordinary shares of £1 each, of the Heritage Alliance Trading Limited, a company registered in the UK, whose purpose was the delivery of the Discovering Places project and which has now become dormant.

Stock

Stock is valued at the lower of cost and estimated selling price less costs to complete and sell, after due regard for obsolete and slow-moving stocks.

Fund structure

Unrestricted funds comprise the general funds of the charity. General funds are available for use at the Trustees' discretion in furtherance of the general objectives of the Charity and have not been designated for other purposes.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by the donors or which have been raised by the charity for particular purposes. The purpose of each restricted fund is set out in the notes to the financial statements.

Pensions and other post-retirement obligations

The Charity contributes to the personal pension arrangements for certain employees. Any cost of providing pensions for employees is charged to the Statement of Financial Activities in the year in which the contributions are paid.

All employer contributions are made into Defined Contribution schemes. The Heritage Alliance has no involvement in, or liabilities towards, any Defined Benefit scheme.

Financial instruments

Classification

The charity holds the following financial instruments:

- Short term trade and other debtors and creditors;
- Cash and bank balances.
- All financial instruments are classified as basic.

Recognition and measurement

The charity has chosen to apply the recognition and measurement principles in FRS102.

Financial instruments are recognised when the charity becomes party to the contractual provisions of the instrument and derecognised when in the case of assets, the contractual rights to cash flows from the assets expire or substantially all the risks and rewards of ownership are transferred to another party, or in the case of liabilities, when the charity's obligations are discharged, expire or are cancelled.

Such instruments are initially measured at transaction price, including transaction costs, and are subsequently carried at the undiscounted amount of the cash or other consideration expected to be paid or received, after taking account of impairment adjustments.

3. Income from donations and legacies

	Unrestricted Funds General £	Total 2024 £
Donations and Legacies	5,025	5,025
Donations from Individuals	<u>5,025</u>	<u>5,025</u>

	Unrestricted Funds General £	Restricted Funds £	Total 2023 £
Donations and Legacies	5,012	30	5,042
Donations from Individuals	<u>5,012</u>	<u>30</u>	<u>5,042</u>

4. Income from charitable activities

	Unrestricted Funds General £	Restricted Funds £	Total 2024 £
Grants	91,311	258,174	349,485
Subscriptions	97,255	3,749	101,004
Advertising income	6,325	-	6,325
Sponsorship	43,800	190	43,990
Income from events	35,866	3,342	39,208
	<u>274,557</u>	<u>265,455</u>	<u>540,012</u>

	Unrestricted Funds General £	Restricted Funds £	Total 2023 £
Grants	99,649	450,394	550,043
Subscriptions	83,443	4,507	87,950
Advertising income	4,965	-	4,965
Sponsorship	33,400	250	33,650
Income from events	13,893	15,082	28,975
	<u>235,350</u>	<u>470,233</u>	<u>705,583</u>

5. Investment income

	Unrestricted Funds General £	Total 2024 £
Other investment income	8,508	8,508
	<u>8,508</u>	<u>8,508</u>

	Unrestricted Funds General £	Total 2023 £
Other investment income	2,339	2,339
	<u>2,339</u>	<u>2,339</u>

6. Expenditure on charitable activities

	Unrestricted Funds General £	Restricted Funds £	Total 2024 £	Total 2023 £
Salaries and National Insurance	250,093	100,076	350,169	308,616
Project expenses	-	92,136	92,136	212,062
Support costs	105,141	-	105,141	117,410
	<u>355,234</u>	<u>192,212</u>	<u>547,446</u>	<u>638,088</u>

	Activities Undertaken Directly £	Activity Support Costs £	2024 £	2023 £
Heritage projects	442,335	105,141	547,476	638,088

Included within the expenditure analysed above, there are also governance costs of £4,343 (2023 - £5,650). See note 7 for further details.

7. Analysis of governance and support costs

	Unrestricted Funds General £	Total 2024 £	Total 2023 £
Salaries and National Insurance	15,930	15,930	51,029
Rent, rates and services	23,040	23,040	13,899
Professional fees	2,322	2,322	8,580
Printing, postage and stationery	691	691	568
Telephone	742	742	2,187
Travel and subsistence	2,089	2,089	578
Insurance	2,005	2,005	1,720
Other expenses	16,295	16,295	5,310
Subscriptions to external bodies	24,725	24,725	1,601
AGM, national and regional events	802	802	15,013
Bank charges	457	457	374
Computer expenses	11,700	11,700	10,573
Governance costs	4,343	4,343	5,978
	<u>105,141</u>	<u>105,141</u>	<u>117,410</u>

Governance costs

	Unrestricted Funds General £	Total 2024 £	Total 2023 £
Independent examiner fees –			
Examination of the financial statements	4,343	4,343	5,650
	<u>4,343</u>	<u>4,343</u>	<u>5,650</u>

The above includes the fee for the subsidiary company Heritage Alliance Trading Limited. The examination charge for the year was £4,343.

8. Trustees' remuneration and expenses

3 trustees received reimbursements of travel and subsistence expenses in the current year totalling £448 (2023 - £328 travel and subsistence).

No trustees, nor any persons connected with them, have received any remuneration from the group during the year.

9. Staff costs

The aggregate payroll costs were as follows:

	2024	2023
	£	£
Wages and salaries	319,715	310,097
Social security costs	24,344	29,037
Pension costs	17,790	20,512
	<u>361,849</u>	<u>359,646</u>

The monthly average number of persons (including senior management team) employed by the group during the year expressed as average headcount was as follows:

	2024	2023
	No.	No.
Full and part time employees	<u>11</u>	<u>12</u>

11 (2023 - 12) of the above employees participated in the Defined Contribution Pension Schemes.

One employee received emoluments of more than £60,000 during the year (2023 - one).

The number of employees whose emoluments fell within the following bands was:

	2024	2023
	No.	No.
£60,001 – £70,000	<u>1</u>	<u>1</u>

The total employee benefits of the key management personnel of the group were £80,685 (2023 - £80,090).

10. Taxation

The group is a registered charity and is therefore exempt from taxation.

11. Fixed asset investments

Charity

Shares in group undertakings and participating interests

	Subsidiary Undertakings £	Total £
Cost		
At 1 April 2023	1	1
At 31 March 2024	1	1
Net Book Value		
At 1 April 2023	1	1
At 31 March 2024	1	1

Details of undertakings

Details of the investments in which the charity holds 20% or more of the nominal value of any class of share capital are as follows:

Undertaking	Country of Incorporation	Holding	Proportion of voting rights and shares held		Principal Activity
			2024	2023	
Subsidiary undertakings					
Heritage Trading Alliance Limited	England and Wales	Ordinary Shares	100%	100%	Dormant company

The address of its registered office is: St Martin Ludgate, Ludgate Hill, London, England, EC4M 7DE.

12. Debtors

	Group 2024 £	Group 2023 £	Charity 2024 £	Charity 2023 £
Trade debtors	30,994	27,587	30,994	27,587
Prepayments	6,765	1,372	6,765	1,372
Other debtors	2,654	1,330	2,653	1,329
	<u>40,413</u>	<u>30,289</u>	<u>40,412</u>	<u>30,288</u>

13. Creditors: amounts falling due within one year

	Group 2024 £	Group 2023 £	Charity 2024 £	Charity 2023 £
Trade creditors	23,096	918	23,096	918
Other creditors	15,450	5,502	15,450	5,502
Accruals	20,695	22,218	20,695	22,218
Deferred income	76,515	94,394	76,515	94,394
	<u>135,756</u>	<u>123,032</u>	<u>135,756</u>	<u>123,032</u>

Deferred income

Group and Charity	2024 £
Deferred income at 1 April 2023	94,394
Resources deferred in the period	37,635
Amounts released from previous periods	(55,514)
Deferred income at 31 March 2024	<u>76,515</u>

14. Commitments

Group and Charity

Other financial commitments

The group and charity has an operating lease commitment.

The total amount of commitment not provided in the financial statements was £31,167 (2023 - £53,167).

15. Funds

	Balance at 1 April 2023 £	Incoming resources £	Resources Expended £	Transfers £	Balance at 31 March 2024 £
Year Ended 31 March 2024					
Unrestricted funds					
General					
Charity and group	337,107	288,090	(355,234)	67,919	337,882
Restricted funds					
Carbon Literacy	-	5,203	(2,163)	-	3,040
Cost Of Living	(6,064)	16,010	(2,573)	(7,373)	-
HEF Capacity Building	6,454	130,499	(95,197)	(25,747)	16,009
Heritage Funding Directory Project	2,145	2,800	(835)	(4,110)	-
Historic Religious Buildings Alliance	18,344	7,023	(4,141)	(3,303)	17,923
Innovation	11,814	12,493	(17,969)	(6,338)	-
Rebuilding	(75)	91,371	(69,334)	(20,961)	1,001
Other	31	56	-	(87)	-
Total restricted funds	32,649	265,455	(192,212)	(67,919)	37,973
Total funds	369,756	553,545	(547,446)	-	375,855

Year Ended 31 March 2023	Balance at 1 April 2022 £	Incoming resources £	Resources Expended £	Transfers £	Balance at 31 March 2023 £
Unrestricted funds					
General					
Charity and group	269,046	242,701	(285,008)	110,368	337,107
Restricted funds					
Cost Of Living	-	8,005	(4,570)	(9,499)	(6,064)
HEF Capacity Building	6,183	117,431	(95,821)	(21,339)	6,454
Heritage Funding Directory Project	2,054	2,800	(709)	(2,000)	2,145
Historic Religious Buildings Alliance	21,420	7,010	(7,086)	(3,000)	18,344
Innovation	-	12,493	(679)	-	11,814
Rebuilding	(6,206)	238,783	(181,187)	(51,465)	(75)
Other	-	31	-	-	31
Digital Innovation	3,920	52,000	(52,011)	(3,909)	-
DASH	-	2,075	-	(2,075)	-
Digital Academy	-	12,829	(250)	(12,579)	-
Philanthropy	133	-	(133)	-	-
Resilience	(1,670)	16,806	(10,634)	(4,502)	-
Total restricted funds	25,834	470,263	(353,080)	(110,368)	32,649
Total funds	294,880	712,964	(638,088)	-	369,756

The specific purposes for which the funds are to be applied are as follows:

- 1) Carbon Literacy is a newly awarded project supporting Historic England to market and deliver (including all management and administration activity) carbon literacy training to staff and organisations across the heritage sector.
- 2) Heritage Funding Directory consists of the ongoing maintenance of a free online directory of sources for heritage funds. It is supported by a generous grant of £2,800 p.a. from the Historic Houses Foundation.
- 3) The Historic Religious Buildings Alliance is a dedicated voluntary organisation housed within the wider Heritage Alliance. It is an interfaith and cross denominational forum which has functioned on an entirely voluntary basis since April 2011. Membership fees were introduced in 2013 to enable the Group to meet various costs such as its annual meeting, direct administration costs and management charges from The Heritage Alliance.
- 4) Philanthropy (Giving to Heritage Programme) – A National Lottery Heritage Funded project has now concluded (2015-2017) and the remaining funds are being used to support general philanthropic work.
- 5) Resilience – A grant from the National Lottery Heritage Fund (2019-2022) supported the improvement of our charity’s resilience and growth through consultancy support, new staffing and training.

- 6) The HEF (Historic Environment Forum) is funded by Historic England and managed by The Heritage Alliance. It brings together senior members of staff from public and non-government bodies to work collaboratively on strategic matters for the historic environment sector in England.
- 7) Rebuilding Heritage was a sector support project (2020-2023) funded by the National Lottery Heritage Fund which offered targeted support to help heritage organisations to respond to the challenges of the Covid-19 pandemic and the Cost-of-Living Crisis. It provided 1:1 support, training and resources on a range of related topics supporting organisational resilience.
- 8) Digital Innovation (renamed Heritage Digital Academy) was a 16-month sector support project (2021-2022) delivered by the Heritage Digital Consortium to support small heritage organisations embed digital strategy and innovation through cohort training. The project was led by Charity Digital and the Heritage Alliance provided consultancy to ensure the programme was bespoke to the Heritage sector.
- 9) Digital Questions was a 12-month resource development project (2021-2022) delivered by the Heritage Digital Consortium, providing answers to the sector's key digital questions through resources. The Heritage Alliance was the lead partner and focused on the topics of "creating, finding and sharing digital content". This project fits under the wider Digital Heritage Hub delivered in partnership with the Arts Marketing Association and the University of Leeds.
- 10) DASH was a digital skill survey reviewing digital skills and aptitudes in the heritage sector. The project was led by Timmus Research with the Heritage Alliance providing consultancy to market the survey, tailor it to the heritage sector and co-author the report accompanying the survey results.
- 11) Cost-of-Living was an 18-month evidence desk (2022-2023) funded by Historic England to gather insights into how the crisis has affected the sector.
- 12) Innovation refers to a 6-month program funded by a grant from the National Lottery Heritage Fund as part of their new 'Innovation: Explore' fund. This grant enabled The Heritage Alliance to investigate the challenges and opportunities in accessing resources and improve wayfinding of non-heritage resources for heritage organisations.

16. Analysis of net assets between funds

	Unrestricted Funds General £	Restricted Funds £	Total Funds at 31 March 2024 £
Current assets	434,757	76,854	511,611
Current liabilities	(96,875)	(38,881)	(135,756)
Total net assets	337,882	37,973	375,855

17. Related party transactions**Group and Charity**

There were no related party transactions in the year.

18. Control

The ultimate controlling party is the Trustees.

The Heritage Alliance

Annual Report and Financial Statements

Final Audit Report

2024-12-11

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