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Cadw

Council for British Archaeology

The Audit and Analysis of Heritage Asset Adoption Schemes

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1 Introduction

Archaeology Scotland was commissioned in February 2022, by the Council for British Archaeology (CBA), to conduct an audit of heritage asset adoption schemes on behalf of Historic Environment Group (HEG) and funded by Cadw. This report sets out the research and analysis of existing schemes in which local communities 'adopt' and care for local heritage assets. The report sets out the nature of adoption projects, discusses the methods in which they are delivered and developed and seeks to set out an approach to delivery in Wales, now and in the future.

This report identified thirty projects that could be seen as adoption schemes (Appendix 4). These projects range from heritage monitoring volunteer initiatives, to volunteer managed projects and to full national level heritage management schemes. Of these thirty, five projects were developed further as case-studies (Appendix 2), in order to understand how adoption schemes of various types were being delivered. A sixth case study, Archaeology Scotland's Adopt-a-Monument Scheme is also included (Appendix 3). Taken together this research identified five broad categories of adoption schemes ranging from the use of assets as engagement opportunities to projects wholly managed by communities. From this we have identified three ways, or scales, for the development of a more coordinated approach in Wales that builds on existing schemes and approaches. It also addresses the broader aspirations of the Wales Historic Environment Group (HEG) to move beyond a traditional approach to managing 'fixed' monuments or heritage assets. An overview of the findings is presented in Appendix 1.

1.1 Acknowledgments

Archaeology Scotland would like to thank all the HEG members and those that generously offered their time to discuss the case-study projects. We would also like to thank the CBA for commissioning the project and for the support of Cadw.

1.2 Adoption Schemes

In the broadest sense, adoption schemes aim to support engagement in heritage, from learning about and interpreting heritage, to becoming actively engaged in the care and conservation of heritage assets. It is worth setting out the range and breadth of adoption schemes as there are many types and scales within the wider net that adoption schemes cover. At their core adoption schemes are focused on volunteer or community-based investigation and management of heritage assets, though there is a great at deal of divergence between those that are mostly concerned with heritage management and those that are more focused on social impact and the benefits for people. In most cases these two outcomes are not mutually exclusive. Projects range widely in scale from large nationwide programmes to smaller scale local interventions on heritage sites. Projects also vary widely in type, from those enabling participants to engage with their heritage to those that involve active community management of heritage assets. In most cases those schemes that operate on a large scale have had a long developmental path (Adopt-a-Monument in Scotland and The School Adopt a Monument in Italy, which are both 30 years old) or had State support and funding (Adopt A Monument Ireland, and Adoptoi Monumenti Finland). Often, the scale at which they operate now can be read as how they have always operated, however, many of these schemes have changed over time and have often undergone gradual change over the course of their existence. Other schemes, such as the Heritage Guardians in the Pembrokeshire Coast National Park are designed to address specific needs for both a heritage organisation and volunteers. Others are designed in order to support local authorities

(Merton), places (Adopt a spot) or particular kinds of heritage assets (Adopt a Station, Adopt a Kiosk, Adopt a Wreck etc.) or assets such as statues and other public monuments as with the and Adopt a Monument in New York. Others address particular audiences, such as schools with the Adopt a Monument in the Netherlands and the School Adopt a Monument in Italy. A number of projects have a people focus and look to deliver social and learning outcomes as part of their programmes, such as CAER in Wales and Adopt-a-Monument in Scotland. There are various scales in terms of size of the programmes too. Some such as the School Adopts a Monument project works across multiple cities, in multiple countries and engages with 100s of Schools. Equally the larger conservation-based programmes such as Ireland's Adopt-a-Monument Scheme supports about 5 projects per year across the country. At the other end of the scale other schemes are focused on individual heritage assets in very local contexts. The same is true of budgets, adoption schemes range from several 100s of thousands of pounds in budget to zero- where the volunteers cover their own expenses.

Amongst these variables there are a great deal of overlaps in terms of both the management of heritage assets and the engagement of and benefit to people. There are also common themes around the provision of guidance, useful activity based resources, and project support for participants. These often being through online resources, staff availability or through signposting. There are often similar challenges, notably capacity, availability of resources and sustainability. The adoption schemes reviewed as part of this report provide a useful baseline as Wales seeks to develop its own programme. The adoption schemes demonstrate what is possible, and the lessons that can be learned in order to develop a programme suited to Wales.

1.3 Aims:

The report sets out to provide an evidence base on which to determine whether adopt a monument type schemes can be better delivered in Wales. Specifically, the project will enable HEG to determine:

- Whether adopt a monument schemes are appropriate for Wales
- Which scheme might best deliver desired results?
- What benefits we might expect to gain from such a scheme
- How to Increase efficiency in resource inputs

2 Methodology:

The Audit and Analysis of Heritage Asset Adoption Schemes provides a great opportunity to develop an understanding of and assess community projects. Community-led heritage stewardship schemes have been running for over 30 years and this is a good chance to draw all of the best practice lessons from these programmes together, assess the challenges and opportunities these schemes present and review their place in Welsh heritage management going forward. In order to audit these schemes, we implemented a 3-stage process.

Stage 1 - conduct a brief literature review in order to identify relevant legislation, policies and strategies that may underpin any proposed scheme including the Well-being of Future Generations (Wales) Act 2015.

Stage 2 - Undertake a wide-ranging audit of adoption schemes, including known activity in Wales, by conducting a desk-based review that identified the different kinds of adoption projects, from national schemes to local approaches and organisational schemes.

Stage 3 - Provide a detailed assessment of five schemes or approaches as case studies. This selection of schemes or approaches was drawn from those reviewed in Stage 2. Initially we had planned to include eight case-studies, however scheduling issues impacted the delivery of this target, and a decision was made to reduce the target to five but to continue to develop links with those that were unable to be included during this initial review. The emphasis was put on schemes that look beyond those developed under the Archaeology Scotland AaM umbrella (though these will be included as a separate case study in Appendix 2). Where possible the case studies have been reviewed from both a functional point of view: looking at how the project was delivered, and from an impact point of view, what were the outcomes? This was done through a combination of desk-based review and targeted interviews with Adoption project staff and organisations. The process of contact and arrangement of interviews was resource heavy and took a considerable amount of time but was very rewarding and worthwhile. Interviews took place online and whilst there was a base set of questions that underpinned this, the discussions were allowed to flow and explore the unique nature of each Adoption scheme. Participants were very generous with their time and knowledge, and it would not have been possible to undertake the review without them.

An important element of these stages of this project was to consider inclusion and participation with different audiences. These community-led, bottom-up approaches focus on a variety of different engagement activities that provide alternative perspectives, and new ways to think about the assessed scheme, as well as increasing engagement in our shared heritage.

This three-stage approach also allows a range of schemes to be considered, that cover a wide geographical area, operate under different legislative and funding models, demonstrate a wide variety of outcomes and benefits, have engaged a wide range of audiences and groups, volunteer management experience and processes and that developed skills and training programmes. All of these projects are relevant to Wales in terms of geography, scale and practical issues. The case-studies also cover a wide range of sites, places and intangible heritage adoption and will allow for a review of site suitability, barriers to participation of both people and places and examples of how these could be mitigated.

On completion of the data gathering 2 further stages of assessment and analysis were completed:

Stage 4 - an analysis of the relevant projects and an assessment of the viability of such schemes for Wales. The report provides evidence of existing scheme benefits and challenges and makes recommendations for the implementation of future heritage adoption schemes in Wales. Scale, funding, and sustainability of adoption schemes have always been an issue and we recognise that these factors have to be considered during the assessment.

Stage 5 – Development of a set of recommendations that cover various models for the long-term delivery of a future scheme in Wales, which aim to be pragmatic, resource compatible and deliverable. This includes a range of delivery options under a wider adoption banner and with a realistic cost model.

3 Results

3.1 Stage 1 Literature Review

A brief literature review was carried out in order to identify relevant legislation, policies and strategies that may underpin any proposed scheme. A selection of research studies were also reviewed.

To begin with it is worth setting out the legislation and guidance relevant to any adoption scheme. The *Conservation Principles for the sustainable management of the historic environment in Wales* states that the 'historic environment is central to Wales's cultural heritage and sense of identity. It is a resource that should be sustained for the benefit of present and future generations' (Cadw 2011; 3). With this as the focus six conservation principles were identified that aim to inform Cadw's approach to the management and protection of heritage, including such things as community engagement. The principles are:

- Principle 1 Historic assets will be managed to sustain their values
- Principle 2 Understanding the significance of historic assets is vital
- Principle 3 The historic environment is a shared resource
- Principle 4 Everyone will be able to participate in sustaining the historic environment
- Principle 5 Decisions about change must be reasonable, transparent and consistent
- Principle 6 Documenting and learning from decisions is essential

The conservation principles acknowledge that they were based upon similar approaches developed in England (2008) and adapted for Wales. Heritage management in Wales also operates under the statutory frameworks developed in four pieces of legislation:

- The Ancient Monuments and Archaeological Areas Act 1979
- The Planning (Listed Buildings and Conservation Areas) Act 1990
- The Protection of Wrecks Act 1973.
- The Historic Environment (Wales) Act 2016

Along-side these Acts Technical Advice Note 24: The Historic Environment provides the specific guidance on how the historic assets should be considered in a number of contexts, such as planning as well as setting out the selection criteria employed in heritage asset designation. Usually, heritage management is also supported by local development plans and place bases strategies. One such example being the *Snowdonia National Park Management Plan* (2020). This plan identifies local frameworks and center's the heritage within the Nine Special Qualities that the National Park holds and works towards.

Together, these Acts and guidance documents provide a clear framework for the ways in which heritage can be managed from a conservation point of view. How this framework would be developed and communicated would need to be considered in the development of any new adoption scheme. Cadw has also developed a range of best practice guidance, based upon the Conservation Principles, which aim to complement the legislative framework and associated planning policy, which could be developed further. A good example of this is the recently launched Talking About Heritage guides in

Scotland (Historic Environment Scotland 2022). The Talking About Heritage project developed four guides-Investigate Heritage; Understand Heritage; Celebrate Heritage; Care for heritage- aimed at addressing needs identified by heritage groups in Scotland. Predicated on the basis that heritage could be places people care about, stories people love, or the language people use. The guides are intended for people who may have an interest in heritage but might be uncertain about where to start and provide a good example of what may be developed for Wales.

Crucially, The Well-being of Future Generations (Wales) Act 2015 provides a great platform to build upon in the creation of such guidance, and more importantly in steering the direction of any new adoption scheme. Adoption schemes have the potential to deliver against the seven well-being goals defined in the act and to support the five ways of working defined by the Act more broadly.

Supplementary guidance has been developed that would also be valuable to anew adoption scheme. For example, the Social Value Toolkit (Stirling University 2019) provides assessment tools and practical guidance for heritage practitioners to understand social value in their work. Outside of heritage other forms of guidance should be considered, a good example of this are those centred on inclusion and safeguarding. For example, the design features for place-based action projects developed by the Local Trust (2022) help projects tackle discrimination and promote inclusion.

The well-being and conservation benefits of heritage engagement projects have been the focus of a wide range of research in recent years. Involvement of volunteers and local community has a long history. As we will see in our review (see 3.2 below) some adoption schemes have been operating for over 30 years (Archaeology Scotland 2017). This stems from the recognition that people want to be involved in the care of their heritage and that heritage organisations could not care for all of our heritage. This required the development of new ways of addressing these issues ((Doyle 2018, 49-50; Johileto 017, 29-30). Whilst there have been critiques of these forms of participatory heritage management (Friedheim, 2019; Waterton and Watson 2011) where an emphasis on fully understanding power dynamics, ethics and the role of the expert have rightly been questioned, adoption programmes have continued to foreground public agency in heritage management with successful outcomes for heritage (Archaeology Scotland 2017; Friedheim 2019; Onciul *et al* 2017; Soininen 2017). Adoption programmes could be seen as mere vehicles for increasing capacity and a reliance by heritage organisations on volunteer input (Chitty 2017, 4). However, adoption programmes can also be vehicles for co-production (Davies *et al* 2019; Graham and Vergunst 1999); learning and engagement (Archaeology Scotland 2017), challenging heritage outcomes (Fredheim 2017), developing models that care for 'other' heritage, such as that of immigrants (Colomer 2013) and addressing societal needs, by, for example, using the materiality of archaeology to assist with dementia (Finlay 2022).

These wider considerations, and the ability for heritage participation to assist with participant wellbeing have been addressed in two important papers by Lewis and the associated project team (Lewis et al 2021; Lewis et al 2022). The Wellbeing in Volunteers on Heritage at Risk Projects (Lewis et al 2021) aimed to explore how Heritage at Risk projects in England could build the capacity needed to support the wellbeing of participants and identified the existing wellbeing benefits within Heritage at Risk Projects. Whilst wellbeing was not the main focus of Heritage at Risk projects there is both existing impact and the ability to develop these further. The second project (Lewis *et al* 2022) focused on participatory approaches to heritage engagement across Europe. Whilst the focus was primarily on

archaeological intervention the study demonstrated the social and heritage benefits of excavation. It explored the impact of participative place-based community archaeology in rural Europe aCommunity archaeology in rural environments meeting societal challenges. These positive outcomes can be seen in two other recent publications that show-case the wider benefits of heritage projects. The Heritage Alliance *Heritage, Health and Wellbeing Report* (2020) examines the key issues around supporting these aspects and presents case-studies demonstrating the impact heritage projects can have. Similarly, the Historic England *Research Issue 20* (2022) special on wellbeing and heritage show cases the wider impact heritage projects are having.

It seems clear that there is both a legislative basis and social and heritage benefit basis for the delivery of adoption projects. There are also existing resources and guidance that can be adapted to support new community-led projects. As we will see below, there are also a great many projects already delivering quality that can be drawn upon in order to learn about how to best deliver a new scheme in Wales.
An initial aim had been to identify potential funders and partners. However, it quickly became apparent that the review was at too early a stage to make such recommendations. That said, as we will see, any proposed adoption scheme would be able to identify and support a wide range of partners and attract funding. Should an adoption programme be delivered in Wales, funders and partners can be 'mapped' against the chosen delivery method, as can the associated literature, legislation, guidance, positive outcomes and participating projects.

3.2 Stage 2 – Audit of Adoption Schemes

Searches for heritage projects were conducted from several sources in order to identify a range of projects that broadly fit into the category of 'adoption scheme'.

A total of 41 projects were identified by the study. The majority of these relate to community-focused projects that are led by, or delivered by, heritage organisations. Of these, 30 projects were explored further and from this long list (Appendix 4) a further 5 were selected as case-studies (Appendix 2). Archaeology Scotland's Adopt-a-Monument was added as a separate case-study (Appendix 1). There are two reasons for the narrowing of the original search. Firstly, scale; projects needed to be achievable with reduced resources, we explicitly did not include projects that primarily required capital works and included conservation architects or engineers (although some of the projects chosen have conducted these aspects, it has not been the primary way of achieving their projects goals). Secondly, information; details of the project needed to be readily available and reviewable within the scope of this report.

The 30 projects selected for further review demonstrate the range of projects that are able to address engagement with and management of heritage assets. The gazetteer of projects presented in Appendix 4 aims to break down the projects in broad terms. The name of the project, the organisation responsible for the programme, location, the audiences the projects were primarily aimed at or delivered by and the kinds of heritage the projects focus on. Finally, a project description is included and the project timescales added in order to assess the longevity and sustainability of projects.

Projects were drawn from across the world, they include projects from Wales, England, Northern Ireland, Scotland and across Europe. Projects based in India and the United States of America were also included. There appears to be a common aim to conserve heritage assets and support volunteers

and that projects can be initiated or led by organisations or communities themselves. Interestingly there seem to be three broad periods that adoption schemes were developed. The late 1980s and early 1990s saw the launch of programmes in Scotland, Italy and the USA; a second period in the early 2000s saw the development of projects such as Caring for Gods Acre and Adopt a Kiosk; the third broad period takes place in the last decade, where projects in India, Ireland and Finland have taken off. The last few years have seen more growth in such programmes. It would be interesting to explore the reasons for these periods in the future. For now, we can tentatively argue that the social, health and heritage management benefits derived from such programmes has begun to be recognised and this may be leading to the growth in new adoption schemes in recent years.

The majority of adoption schemes are aimed at one or two audiences: local communities, volunteers and school groups. Though it should be said that there is a great deal of overlap between audiences. Increasingly, projects have been developing inclusive programmes that aim to increase participation from wider aspects of society.

Adoption schemes also cater to a wide range of heritage assets, from castles to cairns and municipal art to kiosks and stations. Projects deliver everything from vegetation management and surveys to conservation repairs and interpretation. Whilst a large number of projects revolve around designated heritage assets or those in protected landscapes there is a common thread amongst a large number of projects that values places, sites and traditions that are important to local people, yet may not fit traditional heritage management frameworks. This can be seen in projects where conservation management may not take place at all, or at least be a small part of the projects work, such as the Schools Adopt a Monument Project.

3.2.1 Learning from review of schemes

As we have seen local heritage adoption schemes are delivered in a range of ways, from large-scale heritage management programmes to one-off engagement projects and are delivered in order to support heritage management and to share and explore our shared pasts. When reviewing the projects, it became clear that they are delivered in a small number of ways and across an equally small number of models. Principally, adoption programmes can be seen in five broad categories (projects have been placed into categories in Appendix 4):

- Use based Community Asset
- Organisation-led Community Management
- Community-led Management
- Community Managed Assets
- Communal Value and Inclusive Engagement

Use based Community Asset: essentially revolves around the engagement with places, heritage assets and the natural environment. These projects are mostly engagement projects where organisations or groups develop programmes that use the historic environment or heritage assets to enable learning and activity-based opportunities and to develop 'softer' outcomes such as civic pride and social cohesion. A good example in this category is the Schools Adopt a Monument Project in Italy.

Organisation-led Community Management: covers projects that are very similar to the Community-led projects but have a defined operational role led by an over-arching organisation (usually heritage organisations or landowners). Local volunteers and other groups are brought together to undertake heritage management, which may take the form of conservation works or recording and monitoring. A good example in this category are the programmes delivered by the Pembrokeshire Coast National Park.

Community-led Management: are projects that enable communities to manage heritage sites. These adoption schemes are assisted by organisations that provide support, training and advice, but the major project design and decisions are derived from and taken by the community groups that lead the projects. A good example in this category is the Adopt a Monument Project in Finland.

Community Managed Assets: are projects that are wholly led by community based or voluntary organisations. Expertise is usually drawn from within the group and guidance sought from Local Authority and National Organisations, but otherwise all decision making, and project work is delivered by the group itself. A good example in this category is the Friends of Ancient Monuments Project (FOAM).

Communal Value and Inclusive Engagement: includes projects that are interested in other kinds of heritage and wider inclusion and equity in heritage engagement. These projects can be focused on intangible heritage, languages and traditions and are often not principally focused on one site or place. This category also covers those projects that are less heritage asset management based and more focused on social impact and outcomes for people. These include diverse and equitable engagement but also skills and employability or other aspects, such as social proscribing. These projects often use heritage as a hook or theme within which to develop programmes that have positive outcomes for people. A good example in this category is the CAER Hidden Hillfort Project in Wales.

Whilst there are large areas of overlap across the categories, these five broad categories are useful in terms of both understanding the focus of a particular project or scheme and in terms of developing an understanding of the requirements, resources and outcomes of such schemes in the design of any new programmes.

Projects in the Communal Value and Inclusive Engagement category are very much people-focused and seek to deliver activities for everyone in various different ways. The analysis of all the different categories has actually shown that they also have the ability to deliver in his way. This should be seen as a fundamental aspect of any project going forward. Therefore, it is useful to think about the fifth category as a set of principles on which the other categories of adoption schemes should seek to deliver. Outcomes for all categories of projects should be people-focused and seek to address opportunities to improve health and wellbeing, learning and skills, inclusion and equity and in tackling uncomfortable narratives.

3.3 Stage 3 Case-studies– using the five types of schemes identified in stage 2

Five of the projects were selected for further review, The Schools Adopt-a-Monument, Adoptoi Monumenti, Heritage Guardians Project, Friends of Ancient Monuments (FOAM) and the CAER Hidden Hill fort Heritage Project (Appendix 2). The projects were chosen as great exemplars of community-focused projects and because they address elements of the different categories of adoption schemes

set out above. An online review of materials, and a discussion with a member of the project team was held in order to break the projects down further. Each project was considered in terms of audience, the opportunities the projects develop, the challenges they face and the guidance or support that they offer. The results of this are presented below in Table1, and each of the projects is described in more detail in Appendix 2.

As discussed above, the projects were placed into broad categories in order to understand how heritage-based activity was delivered and the principal heritage focus. The case-study projects were able to be analysed in more detail. Firstly, the audiences that the project supports and engages with was explored. Perhaps unsurprisingly, those projects with a larger heritage intervention focus in categories 2-4 (Community-led, Organisation-led and Community Managed Assets) are largely focused on the general public and volunteers that are already participants in the heritage projects. This is true in Adoptoi Monument in Finland, Heritage Guardians and FOAM. That is not to say that newer more diverse audiences are not part of those projects. Schools in particular are a major focus of all of the projects, with the exception of FOAM. The Schools Adopt a Monument project is primarily focused on young people but also works with heritage organisations and local interest groups in order to widen understanding across local groups. For CAER the focus is on engaging all of the groups within the local area and to offer opportunities to all that want to take part. These trends are reflected in the opportunities offered. Again, there are common themes around skills development and engagement opportunities, but each project has specific ways to deliver these and foster participation that demonstrates that each approach is not mutually exclusive and that all have their place. The one aspect that all of the projects shared was a limit to capacity. Whether the project has multiple staff to support the participants or operates on a much smaller scale, capacity was the one challenge raised by all of the case-study projects. There was always more that could be achieved, and more funding would make the projects better and more efficient. Though funding, particularly for longer running projects was difficult to raise. Managing expectations and sustainability were other key challenges. As were issues with maintaining and delivering real co-design with projects that support community delivery.

Most of the projects design and provide guidance and other materials for participants and we discussed other elements that would be important to develop for any new adoption scheme. In particular the safeguarding guidance and support developed for the Schools Adopt a Monument Project is a fundamental necessity for their project and this has a universal application for all projects working with young people and vulnerable groups. Finally, we drew out the social impact that the projects deliver against and looked at whether the projects delivered inclusive projects. This is an aspect very much tied to the audience delivery set out above. Based on all of this we explored whether projects of these kinds could deliver against specific Welsh legislation and major funders outcomes. This is has been set against each category in general and set out in Table 1 below.

How they work	Use based Community Asset	Organisation-led Management	Community-led Management	Community managed	Communal Value and inclusive engagement
Example Case-studies	Schools Adopt-a-Monument, Italy	Heritage Guardians project, Wales	Adoptoi Monumenti, Finland	FOAM, England	CAER Project, Wales
Audiences	•Schools, •organisations supporting diverse and marginalised groups.	•History and archaeology societies, •community councils, schools, •development trusts, •general public.	•History and archaeology societies, •community councils, schools, •general public New audience aspects.	•Self-selecting, •local volunteer networks. •History and archaeology societies.	•Everyone- can have themed focus, and help engage non-traditional groups.
Opportunities	•Engagement and learning. •Wider public information. •Longer term advocacy. •Great for engaged groups- local history, skills, employability and respite. •Great for sector-communications and campaigns. •Fosters the arts, storytelling and place making.	•Skills development, site maintenance and improvement, tourism and storytelling. •Budgets available and usually expertise on hand. •Volunteers feel part of a common goal. •Directly inputs to agreed policies and frameworks. •Volunteer and participation without any other requirements, a plus for volunteers.	•Skills development, site maintenance and improvement of archaeological sites. •Develops tourism, storytelling, pride, local 'ownership' and interpretation. •Important direct input into decision making and can foster community cohesion. •Co-production in truest sense possible- leads to sustainable projects.	•Skills development, site maintenance and improvement of archaeological sites. •Important direct input into decision making and can foster community action. •Very efficient use of resources. •Volunteer and participation without any other requirements, a plus for volunteers.	•Able to focus on and challenge important cultural heritage narratives and develop approaches to inclusion and tackling uncomfortable historical narratives. •Can have biggest impact on people's lives. •Fostering engagement across multiple areas of society and able to address significant community aspirations. •Commonality, cohesion, contested heritage, wellbeing and skills all able to be addressed. •Co-production in truest sense possible- leads to sustainable projects. •Does not need to be site based. Provides opportunities for all.

Challenges	•Capacity - staffing and funding. •Still relies on potential partners/participants 'getting it' and seeing archaeology as relevant and useful. •Particularly with schools-sympathetic teachers. •Working with some audiences can be challenging but also life changing (for all parties).	•Geographically limited. Decision making usually centralised and top-down. •Budget variance. •Capacity, skills shortages, funding for any capital works. •Sustainability-projects ending can have net negative impact. •Has to respond to defined programmes of work needed by the overseeing organisation.	•Capacity, skills shortages, funding for any capital works. •Sustainability-projects ending can have net negative impact. •Expectation raising, and scales of support need to be clearly defined.	•Capacity, skills shortages, funding for any capital works. •Sustainability-projects ending can have net negative impact. •Expectation raising, and scales of support need to be clearly defined. •Usually requires organisation by committed volunteers.	•Capacity. Support can be difficult to define. •Time heavy in some cases. •Access to resources-inequalities need to be addressed. •Projects take time to develop, trust to be formed and the co-production element requires organic approaches to project development and fundraising.
Guidance that is offered and developed by schemes	•Provide safeguarding and guidance on engagement with various audiences. •Health and safety. •Various learning resources but a huge amount exist that could be adapted.	•Health and safety, •low-level site works, •interpretation, •guiding, •Large amount already exists.	•Health and safety, •low-level site works, •interpretation, •guiding, •Large amount already exists.	•Health and safety, •low-level site works, •interpretation, •guiding, •Large amount already exists.	•Provide safeguarding and guidance on engagement with various audiences. •Health and safety. •Various learning resources but a huge amount exists that could be adapted.
Social impacts addressed	•Respite, •Health and well-being, •Skills, •Togetherness. •Civic Pride and Social Cohesion	•Respite, •Health and well-being, •Skills, •Togetherness. •Sustainability •Civic Pride and Social Cohesion	•Respite, •Health and well-being, •Skills, •Togetherness. •Sustainability •Civic Pride and Social Cohesion	•Respite, •Health and well-being, •Skills, •Togetherness. •Sustainability •Civic Pride and Social Cohesion	•Respite, •Health and well-being, •Skills, •Togetherness. •Civic Pride and Social Cohesion
Inclusion and equity	The project addresses inclusion and equity through a broad aim to include young people and opening up opportunities to work with others	The project developed inclusive engagement and skills development opportunities	The project aims to support diverse groups with particular needs through their skills and engagement programmes	Volunteer led and delivered.	The project has inclusion and equity at its heart. Designed elements in order to create inclusive opportunities

Table 1: Case-studies and Project Aspects

4 Stage 4 Analysis, learning and conclusions

This report looked at 30 projects that could broadly be defined as community 'adoption' schemes and explored 5 of these in detail. From this we identified five main types, or categories of project, with related challenges and opportunities

The principal challenge is similar across all of the projects, it is capacity. Whatever the scale of the project, capacity, from staff time, to resources is a challenge across the sector. Maintaining projects over the long-term, both from a personnel point of view (the loss of key driving figures can be difficult to overcome) and from a funding point of view (projects that are considered to have already started can find it difficult to raise new funding). Interestingly, many of the projects discussed here have managed to overcome these challenges. This has been achieved through adaptation of the programmes whilst maintaining the principal purpose of the project, and because the costs and resources needed to deliver projects can be reduced as programmes and activities are designed and become more efficient.

Sustainability is a major concern though and it is true that some projects are both time limited and limited to particular funding opportunities. Often these factors go hand in hand. This can cause issues for the heritage asset itself but for the volunteers and participants too. Projects that end without an exit plan can cause disappointment and reduce volunteer participation in projects. Often adoption schemes create guidance and other materials to mitigate these issues and there is no doubt that these are useful. However, there can often be an expertise dependency, groups and communities still need support from organisations and heritage practitioners. Engagement projects may never be able to overcome this issue. Although it is easier to apply time limited outcomes and goals to those projects.

For those adoption schemes involved in the management of heritage assets these issues can be mitigated in two interconnected ways. Firstly, projects can offer time limited support. Support that provides the training and guidance that enables groups to become self-supporting. Secondly, projects need to plan for post expert support either through digital guidance and resources or through the creation of peer-to-peer support networks.

Projects that provide expert support need to be aware of these issues at inception and plan for the end of the project from the outset. Being clear about the timetable and the time limited nature of support is an important way to manage participant expectation and enable the groups involved to plan for the future of their own projects. 'Experts' need to be aware and manage their own long-term outlooks and understand about what success, and successful management might look like.

At their core though, the Adoption scheme projects show the opportunity heritage projects have to address contemporary issues, from heritage management to social cohesion and health and wellbeing. The projects in all their guises have the opportunity to deliver for Wales, strategically and societally. The ability to address skills development, wellbeing and inclusivity are fundamental aspects across all projects and this should be celebrated and brought forward in any new programme.

Whilst only two of the case-studies are Welsh-based programmes, the lessons that can be drawn from all of the projects would be applicable to WalesIt is worth noting that aspects of these projects are

being delivered in Wales currently through the CAER project, the National Parks and through local initiatives such as the Horn Development Association's Black, Diverse and Welsh Project that sought to help people understand more about the creation of the community that was Tiger Bay and the people of Butetown.

Just as the adoption schemes can be broken down by delivery method, opportunities, challenges and outcomes, they can also be broken down in terms of their requirements for future support. Table 2 below, sets out the guidance documents, tool-kits, promotional messages, promotional tools and the kinds of project templates that have been identified as useful for each category of adoption scheme.

These recommended requirements identify topics that could be focused on whatever delivery model is available in Wales. Again, there is a great deal of overlap across the categories and as we have seen from the case-studies there is a great deal of material already in existence that could be drawn together.

Further, the categories of Adoption scheme were considered in terms of outcomes; what funding, societal and national frameworks that they could be mapped against, and that they either do, or could deliver.

Table 2 sets out the scope of what projects can deliver and the supporting resources needed. Importantly, adoption schemes can address the 5 Principals of the Welsh- Well-being of Future Generations Act 2015.

Requirements					
How they work	**Use based Community Asset**	**Organisation-led Community Management**	**Community-led Management**	**Community managed Assets**	**Communal Value and inclusive engagement**
Guidance that could be produced	•Audience engagement, •evaluation, •learning resources, •Safe guarding, health and safety, •Bank of case studies.	•Caring for heritage, skills based guidance (e.g. photography), •interpretation, •sharing stories, •audience engagement, •evaluation, •health and safety.	•Caring for heritage, skills based guidance (e.g. photography), •interpretation, •sharing stories, •audience engagement, •evaluation, •health and safety.	•Caring for heritage, skills based guidance (e.g. photography), •interpretation, •sharing stories, •audience engagement, •evaluation, •health and safety.	•Audience engagement, •evaluation, •learning resources, •Safe guarding, health and safety, •Bank of case studies.

Toolkits that could be developed	•Produce a toolkit around engagement and activities. •Point towards learning materials.	•Caring and sharing toolkit. •Learning and skills development materials.	•Caring and sharing toolkit. •Learning and skills development materials.	•Caring and sharing toolkit. •Learning and skills development materials.	•Design a toolkit based on digital and intangible heritage. •Produce a toolkit around engagement and activities. •Co-production and evaluation toolkit. •Design a toolkit based on inclusion, contested heritage.
Promotion and messaging options	•Engagement and learning of our shared past. •Archaeology is relevant to modern world. •Produce promotional materials that can be used by organisations. •Social media campaign and information drive to inform potential partners and schools.	•Engagement and learning of our shared past. •Archaeology is relevant to modern world. •Produce promotional materials that can be used by organisations. •Social media campaign and information drive to inform potential partners and groups.	•Engagement and learning of our shared past. •Archaeology is relevant to modern world. •Produce promotional materials that can be used by organisations. •Social media campaign and information drive to inform potential partners and groups.	•Engagement and learning of our shared past. •Archaeology is relevant to modern world. •Produce promotional materials that can be used by organisations. •Social media campaign and information drive to inform potential partners and groups.	•Engagement and learning of our shared past. •Archaeology is relevant to modern world. •Produce promotional materials that can be used by organisations. •Social media campaign and information drive to inform potential partners.
Promotional tools that could be delivered	•Create media guide, •website do and don'ts, •social media support and training.	•Create media guide, •website do and don'ts, •social media support and training.	•Create media guide, •website do and don'ts, •social media support and training.	•Create media guide, •website do and don'ts, •social media support and training.	•Create media guide, •website do and don'ts, •social media support and training.
Templates that could usefully be produced for project use	Create templates for: •communications (press releases etc.), •interpretation/promotional materials, •risk assessments, •evaluation forms, •participant's details.	Create templates for: •communications (press releases etc.), •interpretation/ promotional materials, •risk assessments, •evaluation forms, •participant's details.	Create templates for: •communications (press releases etc.), •interpretation/ promotional materials, •risk assessments, •evaluation forms, •participant's details.	Create templates for: •communications (press releases etc.), •interpretation/ promotional materials, •risk assessments, •evaluation forms, •participant's details.	Create templates for: •communications (press releases etc.), •interpretation/ promotional materials, •risk assessments, •evaluation forms, •participant's details.

Social impacts projects can address	•Respite, •Health and well-being, •Skills, •Togetherness. •Can address all **7 Welsh Government Goals**.	•Respite, •Health and well-being, •Skills, •Togetherness. •Can address all **7 Welsh Government Goals**.	•Respite, •Health and well-being, •Skills, •Togetherness. •Can address all **7 Welsh Government Goals**.	•Respite, •Health and well-being, •Skills, •Togetherness. •Can address all **7 Welsh Government Goals**.	•Respite, •Health and well-being, •Skills, •Togetherness. •Can address all **7 Welsh Government Goals**.
Funding Outcomes &Objectives projects can be mapped against	Can meet most of the **National Heritage Lottery Fund project outcomes**	Can meet most of the **National Heritage Lottery Fund project outcomes**	Can meet most of the **National Heritage Lottery Fund project outcomes.**	Can meet most of the **National Heritage Lottery Fund project outcomes**	Can meet most of the **National Heritage Lottery Fund project outcomes**
National Legislation projects can be tied to	Can address the **5 Principals of the Welsh- Well-being of Future Generations Act 2015**	Can address the **5 Principals of the Welsh- Well-being of Future Generations Act 2015**	Can address the **5 Principals of the Welsh- Well-being of Future Generations Act 2015**	Can address the **5 Principals of the Welsh- Well-being of Future Generations Act 2015**	Can address the **5 Principals of the Welsh- Well-being of Future Generations Act 2015**

Table 2: Requirements

4.1 Delivery in Wales

Table 3, below, sets out three ways in which an Adoption Scheme could be delivered in Wales. These are scaled in order to understand both the resources that would be needed and the support that would be available to groups and communities seeking support. The three approaches are Signposting, Supporting and Delivering.

	Delivering the Programmes in Wales		
How support might be delivered in Wales- 3 Scales	**Signposting**	**Supporting**	**Delivering**
Scope	Online-based signposting and acknowledgement.	As for Signposting, with well-focused self-directed online support. Guidance, resources, case-studies, templates.	As for Supporting, but with dedicated member of staff to provide advice and support.
Resources	Host website.	Host Organisation, website and budget for production of guidance, template etc.	Host Organisation and staff resources.

Costs	Year 1- c.£10,000 ongoing yearly costs of c.£1,000	Year 1- c.£30,000 ongoing yearly costs of c.£5,000 dropping to c. £2,000 - Includes signposting outputs and costs.	Year 1- c.£70,000 ongoing yearly costs of c.£50,000 dropping to £40,000 and so on. Includes signposting and supporting outputs and costs.

Table 3: Three Delivery models

Signposting would be a basic website that would be able to acknowledge and celebrate projects that are already operating, it would also serve as inspiration for new groups looking to set up their own projects. A Signposting provision could also be a useful way of drawing projects together, championing adoption schemes and the development of combined communication and marketing strategies. Costs, to set up a host website would be low and would reduce year on year to support for maintenance. An organisation to host the website would need to be found.

Supporting draws in all the elements of Signposting but would provide self-directed online support, guidance, toolkits, templates and a bank of case-studies. Again, a host organisation would be needed to host the website and to support the commission of any new resources and guidance. Whilst initial costs would be moderate, they would reduce year by year. It would also be an aim to link up with and draw in existing resources in order to expand those available and to promote them more widely. This could be done in a similar way to the way learning resources are collected and promoted through the Heritage Learning Portal in Scotland (Heritage Resources Portal (archaeologyscotland.org.uk). A network of practitioners and volunteers would be a valuable aspect that this scale of delivery could explore.

Delivering, would build upon all of the aspects present in Signposting and Supporting but would also have a dedicated member of staff in order to provide expert advice and support. A host organisation would need to be found, one that has the capacity to host a member of staff. The delivery model would have high setup costs though these would reduce as the production of supporting materials is completed and efficiencies are identified.

All three delivery models have their advantages and disadvantages. The larger the scale of support the more projects can be achieved and the more resources created. The Delivering model would enable wider aspects undertaken by all of the case-study projects to be more easily achieved. However, the costs are high and the sustainability of such programmes difficult to achieve. Equally, Signposting whilst useful and an important step would have limited impact on both existing and new projects without significant marketing. Though it would be a useful first step. Supporting, would enable much more support, without the higher costs and provide opportunities for the growth of Adoption scheme delivery models. The programme in Wales could start small and develop both overtime and organically with communities and organisations. A set of resources and guidance materials could be produced that meets the **Signposting** scale of delivery and which aim towards the **Supporting** scale. This recommendation would, of course, recognise all the activity that is currently underway and is not designed in order to stop or impede this but to build a more joined up approach to information, signposting, supporting, delivering and celebrating. Projects can take place across the different

categories and at different scales. No one model or delivery mechanism would be excluded in any way. What would be possible though would be additional support and resources, together with a shared message, networking and campaign. Wales could have an 'Adoption' scheme that can provide an 'umbrela' for all of the different forms that adoption programmes take. Any future programme should look to be broad and inclusive and take the form of a vehicle that provides support and acknowledgment for existing and future projects and in this way would create a 'mosaic' of project delivery with a shared pool of resources and guidance.

The organisation that delivers the project has not been identified. However, from the discussions held with organisations, HEG and projects it appears that the host organisation would need to be experienced in working with a range of stakeholders and in the promotion of heritage assets and heritage resources. The host organisation would need to have funding support in order to deliver the project and support from HEG where available. A useful next step would be the hosting of a wider networking event for existing adoption schemes in Wales and elsewhere. One of the key aspects of the case-study discussions was the desire to stay in touch, learn more about other projects and work towards a support network for both practitioners and participants. This meeting or conference could be hosted in Wales (online) in order to both share and celebrate what Wales is already achieving and to provide insight from existing projects elsewhere. Other collaborations could begin very soon as Naomi Jones, Head of Cultural Heritage at the Snowdonia National Park Authority has identified the opportunity to work under the umbrella of a 'local adoption scheme' to create a toolkit to support working with diverse audiences.

5 Stage 5 - Recommendations

The review of community focused projects has demonstrated that there are a wide range and scales of adoption schemes and the opportunities and challenges that they address. It is also clear that there are a great many projects that are currently active and that recent years have shown the importance of community-led heritage projects, co-production, and broadening participation in heritage. With that in mind, it is important that any initiative that takes place in Wales respects and celebrates the activity that is being carried out already. Acknowledging and celebrating the endeavor of volunteers and participants should be a key focus of any future project. As should the inspiration and basic material that groups need in order to start new activities. A programme of local adoption can be delivered in Wales and can be delivered through Signposting, Supporting, or Delivering routes discussed above. As well as through the promotion and support of existing projects and networks and a shared campaign.

Based upon the discussion above the following actions are proposed:

- Present the findings of this report to HEG,
- Name the initiative,
- Identify the lead organisation,
- Deliver a Networking Event in Wales that draws on local and international experience of adoption Schemes and community heritage initiatives,

- Agree on the scale of Delivery Programme.

Present the Findings of the Report to HEG: The results of the study will be presented to the HEG group in June 2022 for consideration and comment.

Name the Initiative: The proposed initiative will need a name. The name should, most likely be in Welsh and consideration should be given to using a positive active word that encapsulates the wide range of projects that already exist and that could be developed from this programme. One thing to consider, following initial discussions, is whether the name should include the word adopt or adoption as they may be thought to be restrictive and have to to narrow a focus for potential participants. On the other hand, adopt has a strong recognition factor and is reasonably clear. Though an alternative could be found with similar connotations.

Identify the lead organisation: Any project would need to have a website, resources and potentially, staff, hosted by an organisation. This organisation would need to have experience with event organisation and promotion, working with stakeholders and volunteers, as well as experience in both the creation of and co-ordination of appropriate resources. It may be that a national organisation may be best placed to take this forward in order to draw in wider support and ensure that the project works for the whole of Wales. Though this would need to be fully discussed and reviewed by members of HEG.

Deliver a Networking Event: A wide ranging networking event should be held in Wales. This could take the form of a conference or seminar with workshops. The event would have contributions from adoption schemes drawn from both the case-studies and the longer gazetteer. There is wide interest from the projects contacted to take part in such an event. The event would also be a good opportunity to showcase projects in Wales. The event would showcase existing projects, provide a knowledge exchange, draw awareness to the project and provide the opportunity for potential participants and partners to get involved.

Agree on the scale of the delivery programme: as set out above three scales of delivery were identified; Signposting, Supporting, Delivering. An important step will be to decide on which of these will be taken forward – one, all, or a staged approach that starts small and increases over time. The availability of suitable lead organisations, the needs of potential partners and available funding may have a role to play in this decision. The development of a full Project Design for implementation including, where appropriate, an Audience Development Plan and Communications Strategy may be required at this stage.

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Acts

The Ancient Monuments and Archaeological Areas Act 1979

The Planning (Listed Buildings and Conservation Areas) Act 1990

The Protection of Wrecks Act 1973

The Historic Environment (Wales) Act 2016

The Well-being of Future Generations (Wales) Act 2015.

Appendix 1: Adoption Schemes Overview

	Local Heritage Adoption Schemes				
	Local heritage adoption schemes are delivered in a variety of ways. From large-scale heritage management programmes to one-off engagement projects. Support, Promotion and Sharing.				
How they Work	**Use based Community Asset**	**Community-led Management**	**Organisation-led Community Management**	**Community managed Assets**	**Communal Value and inclusive engagement**
Scales					
Scale of community support	Audience Engagement. Sites and places are used but are only partly managed or not managed at all. Increasing access. Learning and engagement with local places.	Community-led heritage stewardship projects that are supported by an organisation or agency.	Heritage management projects that are led and designed by an agency or organisation.	Heritage stewardship and management projects designed and led by communities- self managed and supported.	Intangible objects, stories. Languages and other cultural traditions and practices. Priorities- diverse audiences and everyone's heritage. Well-being and social impact/justice outcomes. Underpins all five Adoption Strands.
Categories					
How support is delivered	Schools, engagement and New Audiences projects. Often organisation-led with staff resource and funding.	Most Adopt-a-Monument Projects and programmes delivered by non-landowners. Led by community support organisation with staff resource and external funding.	Usually led by landowner or statutory body- such as National Park programmes, crowd sourcing campaigns and coastal projects. Has community support function with staff resource and internal and external funding.	Independent Community Projects. Usually independently funded or have no formal funding.	Projects led by all stakeholders, from heritage bodies to non-heritage-related local groups. Intangible heritage, place names and traditional skills projects. Well-being and social impact/justice outcomes. Should be seen as magnifying glass with which to consider all programme Scales

Communal Value and inclusive engagement	Lens or magnifying glass through which all scales should be seen

Appendix 2: Case-studies

The Schools Adopts a Monument

Case-studies	Engagement
	Case study- **The School Adopts a Monument**
Who	Led by Napoli99 (Napolinovantanove) who are the coordinators across a wider network.
What	The School Adopts a Monument was created in 1992 by the Napoli Novantanove Foundation of Naples. Initially, it started with the involvement of different schools in Naples and later it began to spread to different Italian cities and then wider. Aims to help young people to engage in protection and safeguarding of historical heritage sites, through the adoption of a monument by the schools and the consequent involvement of the students. Each school involved in the project is responsible for a monument for a period of three years. Under the auspices of the teachers, the students become the protagonists of the activities that will be carried out in order to learn about the adopted monument in depth, and, later, explain this information to the citizens. To do so, the students make a historical, cultural and environmental study of the monument and then design a program for its care and appreciation.
Who is involved	• The project is aimed at all the schools providing primary and secondary education in each city. • Schools, teachers, and students and heritage practitioners are the main participants.
Range and breadth of heritage	Wide range. From wells, public monuments to villas and convents.
Activities	• Students are encouraged to become involved in the research, investigation and exploration of monuments • In order to understand them better, for storytelling, interpretation and to influence its management • Students learn skills in order to do this. Create videos and work towards annual celebration • Schools adopt a site for 3-10 years • Workshops

How did it change	• Created the National Network of the cities to develop the project and that allowed the project to grow, little by little • Project spreads through good practice and robust guidance • But also through people, teachers changing jobs and developing a programme in their new city is key to the project growth • The addition of competitions and artistic interventions to improve engagement • Involvement of Ministers and Government allowed for sustainability but also for the wider benefits of the projects to be recognised • Language a key mechanism for delivery and engaging wider communities
Impact	• 30 years old! • 1500 videos so far for National Adopt Day • Some projects reach 10 years and are still going • Works in over 80 cities, and in over 3000 schools, 300,000 students - across Europe and Argentina and Brazil • 1800 schools belong to the network and continuously growing
Resources	Guidance and activity guides are produced. Being different cities, small or large, from the South or the North, it was necessary to have a Regulation on the correct teaching method that was to be used in all participating schools
Staffing	Has dedicated staff
Funding	Various - for the network
What is this good for?	• Championing heritage assets • Learning and sharing history Civic pride and belonging • Skills development • Large impact for low cost • Model that is already proven • Long and sustainable approach
Challenges	• Capacity- people and funding • Retirement of key teachers or stakeholder • Funding is difficult for long-lived projects • Safeguarding and teaching standards need to be maintained
Sustainability	There are many reasons why we were able to keep it going for so many years, the key was in building a community of teachers and students that feel part of a civic project
Inclusion	Can include all students at a given school and looks at a wide range of shared heritage
Timeframe	1992- present
Website	lascuolaadottaunmonumento.it
Contact	Mirella Barracco

Adoptoi Monumentti

Case-studies	Community-led
	Case study- **Adoptoi Monumentti**, Finland.
Who	Organised by Pirkanmaa Provincial Museum, Tampere but has spread to other organisations in Helsinki, Central Finland, Vantaa and Satakunta
What	Adopt-a-Monument is a project where the public can volunteer to take care of archaeological sites, historic structures and old buildings
Who is involved	General public, volunteers, local groups
Range and breadth of heritage	Wide range. Cairns, forts, timber buildings and public monuments
Activities	• Sites for Adoption are set, and project plans discussed with interested groups • Support through training workshops and guidance • Traditional and heritage skill support • Celebration
How did it change	• Development of good practice and robust guidance • Spread through showing model works but also by networking and staff movement • Developed mechanisms to widen participation such as skills and inclusion
Impact	• 38 sites Adopted • Part of European Cities network • Raised awareness of sites needing care and the stories that encapsulate them • Winner of Europa Nostra Award
Resources	Guidance, training, skills workshops and celebrations delivered.
Staffing	Has dedicated staff
Funding	Municipal funding with some EU funding
What is this good for?	• Championing heritage assets • Learning and sharing history, Civic pride, and belonging • Skills development • Large impact for low cost • Model that is already proven • Long-term and sustainable approach
Challenges	• Capacity- people and funding • Managing expectations of participants • Funding is difficult for long-lived projects and for capital works • Ensuring standards are maintained
Sustainability	Reliant on Municipal funding and sustaining best practice

Inclusion	Included groups new to Finland and has started to work with the Eura Employment Unit
Timeframe	2007- present
Website	adoptoimonumentti.fi
Contact	Tuija-Liisa Soininen

Pembrokeshire Coast National Park

Case-studies	**Organisation-led**
	Case study- **Safeguarding Scheduled Monuments**, Wales
Who	Pembrokeshire Coast National Park
What	A volunteer led monitoring programme. The volunteers visit scheduled monuments that are accessible within the national park area and close to their home. They complete an online form, and this helps identify issues for the national park to help address. Between September and present, well over a hundred visits have taken place
Who is involved	Local Volunteers
Range and breadth of heritage	143 publicly accessible scheduled monuments within Pembrokeshire Coast National Park
Activities	• Site visits • Completion of monitoring forms • Assessment of issues • Informs management of sites
How did it change	Developed with participants in order to make process as easy as possible. Developing a similar programme with the National Trust
Impact	• Recruitment of 17 volunteers • Almost 100 site visits completed, with forms submitted for most sites • Assessed by the community archaeologist with recommendations • Helps monitor heritage crime issues at sites
Resources	Volunteer training
Staffing	Part of National Parks Archaeologists Role
Funding	National Parks Programmes
What is this good for?	• Championing heritage assets • Learning and sharing history Civic pride and belonging • Skills development • Large impact for low cost

	• Engagement and learning
Challenges	• Capacity- people and funding • Resource heavy and start but should reduce and be supported by existing staff resource • Ensuring standards are maintained
Sustainability	Reliant staff capacity, but continued training of volunteers reduces staff commitment
Inclusion	Can be open to all, and whilst focused on accessible sites can be developed to support a wider range of people
Timeframe	2020-present
Website	pembrokeshirecoast.wales/about-the-national-park/archaeology/
Contact	Tomos Jones

Friends of Ancient Monuments

Case-studies	**Community managed**
	Case study- **FOAM**
Who	FOAM – CBA Wessex
What	FOAM is where volunteers who enjoy working in the open air come together, helping to enhance our heritage by clearing scrub, emptying moats and improving the appearance and preservation of our ancient monuments. Projects are usually carried out on an ad hoc basis as and when required. Improving the appearance and preservation of our ancient monuments
Who is involved	Local Volunteers
Range and breadth of heritage	Various, including Barrow groups near Stonehenge Old Sarum Odiham Castle
Activities	• Vegetation management • Volunteer training
How did it change	Spread to other regions

Impact	This established the group and the method and, after completing the Normanton Barrows a large proportion of the Lake barrow group was also cleared, sometimes of more substantial vegetation growth. In Hampshire, a group was established which cleared Odiham Castle and worked at Basing House and Danebury Hill Fort. While back in Wiltshire, FOAM assisted with the clearance of the ramparts of Old Sarum. The final piece of work carried out was the clearance of an outlying disc barrow in the Normanton Group
Resources	Produced guidance for volunteers
Staffing	None
Funding	None
What is this good for?	• Championing Heritage assets • It does not require complex organisation • It has conservation and education benefits • It is an outdoor activity/healthy exercise • It has the advantage of instant results. One day with even a small group of people can make a huge and highly visible difference • It can involve individuals of all ages with a range of skills and abilities
Challenges	• Capacity- relies on local organisation • Resources not available or difficult to get hold of- e.g. insurance • Requires good relationships with landowners and heritage managers
Sustainability	Relies on local volunteer capacity
Inclusion	Could be adapted for all
Timeframe	2004-?
Website	
Contact	Julian Richards

CAER Heritage Project

Case-studies	**Intangible- Traditions and Languages**
	Case study- **CAER Heritage Project,** Cardiff University and ACE
Who	CAER Heritage is a collaboration between ACE, Cardiff University, and local partners

What	The project focuses upon the research of one of the most impressive, but under-appreciated heritage sites in Wales, Caerau Hill Fort. This nationally important site is surrounded by the west Cardiff suburbs of Caerau and Ely, which are communities facing serious social and economic challenges. From the beginning the guiding principle has been to actively involve community members, groups and heritage professionals in the co-production of archaeological and historical research to create educational opportunities, break down barriers to educational progression, promote skills development and challenge the negative perceptions of these communities.
Who is involved	Reflects diverse audiences- ACE, Cardiff University, local schools, residents and many others
Range and breadth of heritage	Caerau Hill Fort and associated heritage
Activities	• CAER activities are wide-ranging including • Geophysics • Excavations (including an excavation by Time Team in 2012) • Artefact analyses • Exhibitions • Art installations • Films • Heritage trails • Performances • Accredited courses • Experimental archaeology
How did it change	Developed organically over time as relationships developed and opportunities arouse and challenges needed to be addressed
Impact	• Heritage and community centre • 100s of people involved • Fully embedded in the community • Skills development • Heritage management and research
Resources	Guidance, learning materials and activity guides
Staffing	Broad staffing team drawn from partners
Funding	NLHF, Cardiff University, Moondance Foundation, Children in Need, Wales and West Housing Association and First Campus

What is this good for?	• Able to focus on and challenge important cultural heritage narratives and develop approaches to inclusion • Can have biggest impact on people's lives • Fostering engagement across multiple areas of society and able to address significant community aspirations • Commonality, cohesion, contested heritage, well-being and skills all able to be addressed • Wider engagement- more diverse participation • Not tick box but people focused projects • Can take place anywhere and any when • Co-production in truest sense possible- leads to sustainable projects • Does not need to be site based. Provides opportunities for all
Challenges	• Capacity • Support can be difficult to define • Time heavy in some cases • Access to resources • Inequalities need to be addressed • Projects take time to develop • Trust to be formed and the co-production element requires organic approaches to project development and fundraising
Sustainability	Meeting community needs and being embedded in the community are important factors
Inclusion	Open and accessible to all. Adaptable
Timeframe	2010-present
Website	caerheritageproject.com
Contact	Oliver Davis

Appendix 3: Adopt-a-Monument Archaeology Scotland

Archaeology Scotland's Adopt-a-Monument Scheme (AaM) is not only one of the most long-lived, but also has funded staff and a range of wider engagement aims. At its core AaM provides the expertise and advice that local groups need to successfully complete their stewardship projects. This training and advice supports community groups to learn and care for Scotland's archaeological sites. The project ties in with the strategic aims set out in Scotland's Archaeology Strategy. In particular, the Scheme contributes to management of the historic environment, provides new skills, builds capacity, and engages new audiences. In this way AaM is a classic example of volunteer-led heritage management. However, AaM also provides the opportunities for people of all ages (and backgrounds) to engage with heritage in a manner which empowers and educates participants and promotes a sense of ownership and civic pride. Since 1992, the Scheme has completed over 115 'traditional' projects and a further 25 projects with underrepresented non-traditional audiences. Skills development is also an important strand of the Scheme where AaM works with partners on heritage projects in order to develop employability and support skills development, including the provision of activities that increase well-being, confidence and health.

Community-led Stewardship is the theme that is most traditionally associated with Adopt-a-Monument and there is a huge amount of demand and need for the support the Scheme provides. AaM is underpinned by the community-led nature of the archaeological projects. With support and advice from AaM, the stewardship projects are designed and implemented by the communities that lead them. In this way, communities are empowered to take an active role in the care and understanding of the historic environment. The Communities involved in leading the projects are supported to develop their ideas, care for, learn about, and manage their heritage, raise any necessary funding, develop interpretation and share their projects. Through training and advice community groups learn how to care for Scotland's archaeological sites and landscapes. Professional support enables community groups to improve, understand and secure the future management of a wide range of heritage sites. This is delivered through staff time, guidance, training workshops and field schools. This successful model of how to provide the opportunities to enable Scotland's communities to care for their past has now been taken up internationally.

Over the last several years, AaM has been working with organisations to explore the potential of the Adopt-a-Monument model as a means of caring for and promoting heritage in different contexts. A number of projects have been completed, ranging from the Lowland Broch Project with the Forestry Commission, Rouken Glen Park with East Renfrewshire Council, Treasured Remains with the Clyde and Avon Valley Landscape Partnership and Canal College with Scottish Waterways Trust. These projects have demonstrated both the need for the kinds of support that AaM can provide across the heritage sector, but also demonstrate that the AaM model is transferable and, importantly, scalable. In the above projects, the stewardship and training element have been of great benefit to landowners such as East Renfrewshire Council and Scottish Canals, particularly in the way in which archaeological sites that they are responsible for are managed. With Canal College Archaeology Scotland have been able to support a flagship employability project for young people based upon AaM's engagement programme.

AaM has developed engagement opportunities open to anyone who wishes to engage with their local heritage. The engagement programme has demonstrated the scope and potential for heritage activities to improve well-being, employability and provide respite for vulnerable groups. This aspect

of the scheme revolves around engaging communities, training people and trying to make meaningful changes to people's lives; be that through skills development or well-being opportunities. At Archaeology Scotland these various strands of AaM have led to the development of two new initiatives. A New Audience project that engages refugees and asylum seekers to meet local people and learn about our shared history, primarily through the investigation of the local neighborhood and sporting heritage. Secondly, skills and employability for young people of school age, via the Attainment through Archaeology Programme, a series of five- or ten-week courses using heritage to develop transferable skills and impactful experiences.

All of that said, the main focus of AaM is the care for and promotion of heritage that is important to local people. The average project has a set of outcomes and outputs that are aimed at addressing the care of heritage sites. These include vegetation management, access improvement, remedial conservation repairs where necessary, access improvements and interpretation. This can include things from fencing, path building to tour guiding and tackling anti-social behaviour. Projects aim to develop a management plan for the sustainable management of the sites in the long-term. AaM projects are supported by professional staff but are led by the community. Training and support are offered as is support with fundraising. Projects typically cost £5-9,000 each. Though many cost less and some much more. Close support for fieldwork and works from the AaM team last 2 years in the first instance, though advice is always available. Many projects continue, with some in their second decade, whilst others are time limited as part of their original scope.

Appendix 4: Adoption Scheme Gazetteer

Name	Organisation	Location	Description	Audiences
Adopt-a-Monument	Archaeology Scotland	Scotland	Adopt-a-Monument is a nation-wide community archaeology scheme that provides volunteer groups with the practical advice and training they need to care for and conserve their local heritage. The project encourages groups to get involved in hands-on activities to improve the condition, accessibility and interpretation of their chosen site. Currently 115 sites have been Adopted.	Communities, heritage groups and new audiences.
Adopt A Monument	Abarta Heritage and the Heritage Council	Ireland	A scheme to help communities become actively involved in the conservation and interpretation of their local archaeological and cultural heritage sites. Their mission is to use the Adopt a Monument Scheme to provide expertise, mentoring and support to encourage communities to 'adopt' a monument in their area in order to ensure ongoing maintenance and greater protection through increased civic value. Their aims and objectives seek to bring monuments and local heritage from the periphery into the heart of a community so that it can serve as a focal point for heritage-related, educational and recreational activities and will encourage greater interpretation and understanding.	General public, volunteers, local groups.

Adoptoi Monumenti	Pirkanmaa Provincial Museum	Finland	Adopt a Monument is a project where the public can volunteer to take care of archaeological sites, historic structures and old buildings. There are 38 adopted sites. 22 in Pirkanmaa, one in Central Finland, 11 in Helsinki one in Vantaa and three in Satakunta.	General public, volunteers, local groups.
The School Adopts a Monument	Napoli99	Napoli, Italy	The School Adopts a Monument was created in 1992 by the Napoli Novantanove Foundation of Naples. Initially, it started with the involvement of different schools in Naples and later it began to spread to different Italian cities. Aims to make young generations aware of the protection and safeguarding of historical heritage sites, through the adoption of a monument by the schools and the consequent involvement of the students. At this time more than 80 Italian cities are involved in this initiative, and it has also spread to about 15 cities in Europe and two in South America. The project is aimed at all the schools in primary and secondary education in the city. Each school involved in the project is responsible for a monument for a period of three years. Under the auspices of the teachers, the students become the protagonists of the activities that will be carried out in order to learn about the adopted monument in depth, and, later, explain this information to the citizens. To do so, the students make a historical, cultural and environmental study of the monument and then design a program for its care and appreciation.	Schools.

PEAM, 'Projecte Educatiu d'Adopcio de Monuments' (Monuments Adoption Education Project)	Laboratory of Archaeology and Education of CEPAP and Camp d'Aprenentage de la Noguera	Catalonia Spain	The Educational Project for the Adoption of Monuments (PEAM) is a networking experience, developed mainly between 2004 and 2014, to boost the knowledge of the historical and archaeological heritage of each municipality through specific work in schools around a nearby 'monument' that promotes not only the approach to local history, but also social cohesion from the construction of civic values and common identity links. This educational programme proposes complementary forms of learning and the assessment of the historical and cultural heritage in the local environment and aims to involve not only the educational centres, but also the school community as a whole, the municipalities and local or regional entities that are part of the nearby environment of the participating centres. 35 sites adopted.	6-18 year olds
La Escuela Adopta un Monumento	Consorcio de la Ciudad Monumental de Merida	Merida, Spain	Part of schools Adopt Project that started in Naples, 1992, and brought to Merida by the Consorcio de la Ciudad Monumental (the Monumental City Consortium). Aim to promote the respect, value and care of heritage through its knowledge and understanding. Mostly museums or scheduled monuments. 26 sites adopted	6-18 year olds
La scuola adotta un monumento'	Fondazione Napoli Novantanove	Turin, Italy	The school adopts a monument: A program which promotes the appropriation and protection of the historical heritage of Turin.	Schools

Costa Dos Castros	Association Costa dos Castros	Galicia, Spain	The Costa dos Castros Association project delivered outreach through a series of talks entitled "Conversations on the Costa dos Castros", aimed at sharing knowledge of the work being done on local heritage. Aims to publicise research, findings and new approaches to issues such as the archaeological, architectural and tangible-intangible heritage	Local people
Adopt A Monument	Edinburgh Council	Edinburgh, Scotland	Focused on the famous city monuments and other heritage sites. Did have a project officer.	Local people
Adopt A Monument	Merton Heritage Forum	Merton, England	Pilot scheme in Autumn 2016: Local monument adopted by a local school, community group, and residents. Consisted of basic site monitoring and visits, research on the site, and increased signage, leaflets, and displays. Aimed to preserve, record, and interpret monuments for posterity; increase in public access to local heritage; linking monuments and communities in a mutually beneficial way. Originally proposed in 2016, and discussed in annual Merton Heritage Forum Meetings in 2016-2017, but never appeared to get off the ground as an 'Adopt' style project. Some of the suggested sites appear to have been incorporated into other pre-existing projects, whilst others were not mentioned or were under threat.	Local schools, community groups, an residents

Monument Watch	Cornwall Archaeology Society	Cornwall and the Isles of Scilly	Society members, led by Area Representatives, assist Historic England and Cornwall Council in monitoring and recording the state of Scheduled Monuments and other sites of historic interest in Cornwall. Aims to create up-to-date records of assessed monuments, and to provide training opportunities to society members.	Cornwall Archaeology Society members
Adopt a Station	Association of Community Rail Partnerships	UK Wide	Encourages development of 'station groups' to adopt and care for their station. Aims to improve the local area, making it more attractive; to improve sustainable living, wellbeing, community cohesion and pride. Over 1,000 station adoption or 'station friends' groups established, covering over one third of Britain's stations To create a welcoming station for passengers. To create welcoming spaces to encourage rail travel, attract additional footfall, and reduce crime and anti-social behaviour.	Any group of local volunteers, either a newly formed group o existing group(s) including schools, charities, environmental or gardening groups, parish or town council faith or church groups
Adopt a Spot	Keep NI Beautiful	NorthernI reland	Enables volunteers to adopt an area and look after it. Social benefits are very much at the core of this scheme. Live Here Love Here is a positive, people-powered campaign focused on improving the local environment and building a sense of civic pride into communities.	Local communities

Adopt a Heritage	Ministry of Tourism, Government of India	India	Goal to hand over management/development/care of sites and monuments from ASI (Archaeological Survey of India) to private and public sector companies, trusts, individuals and NGOs, who would be known as 'Mounemant Mitras'. Aims: developing basic tourism infrastructure in and around heritage sites, monuments, natural sites and tourist sites; develop facilities and amenities to improve the tourist experience at heritage sites, monuments, natural sites and tourist sites; promote cultural and heritage value of the country and develop avenues to create awareness about the heritage/natural/tourist sites in the country; develop and promote sustainable tourism infrastructure and ensure proper Operations and Maintenance therein; develop employment opportunities and support livelihoods of local communities at the heritage, natural and tourist sites. Began with 93 sites that has been extended to heritage, natural and tourist sites across India. A list of potential sites for adoption is included on the Adopt a Heritage website.	Private and public sector companies, trusts, individuals and NGOs

Heritage Guardians Project	Pembrokeshire Coast National Park	Wales	Started in 2018 by Delun Gibby and continued by Tomas Jones. Worked with a number of local schools and a special needs college to get them interested in archaeology and heritage more broadly. During lockdown they produced some videos to get a school interested in archaeology in the national park and managed to do visits to archaeological sites and Castell Henllys before the summer break this year. An evaluation is underway to see how to take this project forward more long term. Aimed to encourage local primary schools within the National Park to 'adopt' a local heritage monument where they can help improve the appearance, access, awareness, monitoring and interpretation of the site. As part of this process the site can be used as a means to deliver aspects of the school curriculum including art, history, science and mathematics. The children will also be introduced to archaeological techniques such as artefact identification, recording and excavating. Ultimately the project hopes to introduce children to their local heritage, encourage their interaction with this heritage and inspire them to take pride in it.	Primary Schools

Safeguarding Scheduled Monuments	Pembrokeshire Coast National Park	Wales	A volunteer-led monitoring programme. The volunteers visit scheduled monuments that are accessible within the national park area and close to their home. They complete an online form and this helps identify issues for the national park to help address. Between September and present well over a hundred visits have taken place. This also helps to monitor heritage crime issues at sites. Recruitment of 17 volunteers. Almost 100 site visits completed, with forms submitted for most sites, and some assessed by the community archaeologist with recommendations.	Local Volunteers

Norfolk Heritage Explorer	Norfolk Historic Environment Service NHES	Norfolk, England	The Norfolk Heritage Explorer is an abridged version of the HER. The Heritage Explorer project seems to have run in 2006/7 in partnership with Norfolk's Monument Management project set up in 1990 to 'encourage sustainable management of historic monuments'. A number of archaeological sites and buildings across Norfolk are in a state of neglect but not all can be realistically protected or improved by existing legislation or by NHES or other heritage organisations. Aims to provide the chance to get active and rediscover the past; the chance to learn new skills; the chance to transform a disused space into something useful for the local community; the chance to carry out research into the history of the site; the chance to improve access to information about the site; the chance to help with site management; the chance to improve on-site interpretation. Since 2012 have trained up volunteers in monitoring sites and one of the main outcomes has been 'Section 17 management agreements', whereby landowners commit to undertaking specific work and get a tax free grant in return.	General Public

Adopt a Monument/Adopt a Mural	Municipal Art Society	New York, USA	In response to the deterioration of many of New York City's outdoor statues and public murals in hospitals, schools and libraries, and the limited resources to preserve them, The Municipal Art Society initiated the Adopt-A-Monument program in 1987 and the Adopt-A-Mural program in 1991. Both programs were born as pleas to corporate and private donors to support the conservation of the city's most neglected public statues and threatened murals. Today the programs protect 53 works of public art across all five boroughs.	General public
Adopt a Kiosk	BT Payphones	UK	The Adopt a Kiosk scheme has been successful in transforming unused payphone kiosks and preserves the heritage of the red kiosk, particularly in rural locations. Aims to preserve phone boxes and give communities the opportunity to get back in touch with their local phone box, to make them once again an asset that local people can enjoy. More than 5,000 communities across the UK have seized the opportunity to do something wonderful with local phone boxes that had little or no usage. The growth of the mobile phone industry has inevitably meant phone box usage has dropped dramatically, and nearly half of the phone boxes in the UK have been removed, but there are still around 5,000 red phone boxes which can be adopted. Since the Adopt a Kiosk scheme was launched in 2008, over 6,600 kiosks have been adopted.	Open to recognised local authority (e.g. District/Borough Council) Parish/Community/Town Council, or equivalent registered charity, or private land owner. (Anyone who has one of the telephone boxes on their land)

Adopt a Wreck	Nautical Archaeology So ciety	UK and overseas	The Adopt a Wreck scheme was originally devised in 2000 with funding from the Heritage Lottery Fund. The scheme serves as a way of encouraging the public to actively record the sites they are visiting and everyone who has adopted a site is encouraged to submit their work for the annual Adopt a Wreck Award. Aim to record wreck sites, and record and care for other related sites. 120 wrecks adopted.	Dive groups, general public

Adopt a Monument	National Committee 4 and 5 May	Netherlands	With the Adopt a Monument project, local war history comes to life for students: they discover the story behind a war memorial in their neighbourhood. They learn what remembrance is and why it is important to pass on the stories from the war. By researching their monument or war grave and organizing a commemoration themselves, students become involved in history. School classes with pupils from the age of 12 can 'adopt' a war monument in their own village or neighbourhood. This project helps children learn more about the local history of the Second World War and lets them experience for themselves how it is to attend a commemoration ceremony.	Schools
Adopted un château		France	Adopt a castle was created in 2015, in order to propose a new way of seeing heritage. There are 30,000 castles in France, many of which are considered to be in danger. For Adopt a castle there is the need for global thinking and policy change in favour of heritage. The project focuses on the design of projects around the monuments they want to save and the search for partners who can help achieve this.	General Public
Monument Watch	HES	Scotland	Community monitoring of archaeological sites. Focused on HES sites.	General Public

FOAM – CBA Wessex	Wessex CBA Also Basingstoke Archaeological and Historical Society	England	FOAM is where volunteers who enjoy working in the open air come together, helping to enhance our heritage by clearing scrub, emptying moats and improving the appearance and preservation of our ancient monuments. Projects are usually carried out on an ad-hoc basis as and when required. Aims to improve the appearance and preservation of ancient monuments.	Volunteers, CBA members
Caring for Gods Acre	Caring for Gods Acre	UK wide	Caring for God's Acre was established in 2000 as a national charity, promoting the conservation of burial sites and supporting the volunteers who look after and maintain them. The project produces learning resources for education and for practical assistance with conservation tasks, such as Education and Action Packs; running training courses to help people identify and record species in their local burial grounds; adding these records to our growing database at https://burialgrounds.nbnatlas.org/; hosting national Love Your Burial Ground Week in June each year, which encourages burial ground managers to hold awareness-raising ecological events which are accessible by all; maintaining an ever-growing library of resources on their website for download.	General public, volunteers, local grou

Adopt a Path	Outdoor Access Trust for Scotland	Scotland National Parks	It supports people who are passionate about Scotland's outdoors become custodians of some of the most important upland paths, and help to conserve fragile landscapes. Adopt A Path volunteers are trained and supported to safely survey paths for erosion damage or other issues. Volunteers are expected to report on their path once or twice a year, maintenance can be carried out by volunteers or contractors, and paths are maintained for generations to come.	General Public, volunteers, local grou
Adopt a Monument	Brecon Beacons National Park	Wales	The project aims to collect a systematic set of monitoring data for protected heritage sites within the Brecon Beacons National Park, to help build a long term database of the condition of these monuments.	Local volunteers

Unloved Heritage?	7 regions in Wales	Wales	Unloved Heritage? is a programme of community archaeology activities designed to engage, enthuse and inspire young people throughout Wales to get involved with their local heritage. Unloved Heritage? is made of seven regional projects, led by young people and heritage organisations across Wales. Each of the seven projects was developed with young people and local partners. They're all different, to make sure that they fit in with the region's archaeology and its people. Using activities ranging from traditional archaeology to virtual reality, from recording music to recording buildings, and from cycling to canoeing, young people have worked to create appealing activities. They're all designed to get young people exploring the heritage world around them, and telling the stories of their explorations. These stories help interpret local heritage sites and aim to be a lasting legacy of the project.	Young people

Friends of Friendless Churches	Friends of Friendless Churches	England and Wales	Aims to rescue and repair historic buildings, by undertaking gentle repairs, sensitive restoration, and careful conservation. The project champions traditional methods and supports local communities by employing local crafts and trades-people wherever possible. The project celebrates the history, art, architecture, and science of the sites, sharing their beauty and brilliance with people across the world. The project aims to be a voice for disused churches in the heritage sector and beyond, bringing attention to the growing challenge of the future of redundant places of worship and advocating for their importance and perpetual preservation.	Local volunteers

CAER hidden hill fort	Cardiff University and ACE	Cardiff, Wales	CAER Heritage was established in 2011 and is a collaboration between Action in Caerau and Ely (ACE), Cardiff University, local schools, residents, community groups and many others. The project focuses upon the research of one of the most impressive, but under-appreciated heritage sites in Wales, Caerau Hill Fort. This nationally important site is surrounded by the west Cardiff suburbs of Caerau and Ely, which are communities facing serious social and economic challenges. From the beginning the guiding principle has been to actively involve community members, groups and heritage professionals in the co-production of archaeological and historical research to create educational opportunities, break down barriers to educational progression, promote skills development and challenge the negative perceptions of these communities. CAER activities are wide-ranging and have included geophysics, excavations (including an excavation by Time Team in 2012), artefact analyses, exhibitions, art installations, films, heritage trails, performances, accredited courses and experimental archaeology.	Local volunteers