

# Catalyst Cymru: Broadening Horizons

**Project Evaluation**

**July 2024**



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**Funding Eye Ltd**

## **Acknowledgements**

Many thanks to all the staff at WCVA who helped contribute to the production of the evaluation together with the staff from Cwmpas, Disability Wales, EYST (Ethnic Minorities and Youth Support Team) and Pride Cymru.

Thanks also to the coaches for their feedback on their experiences and finally the participants from organisations whose honest and open feedback on the support was invaluable in producing this evaluation.

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## 1) Executive Summary

The Catalyst Cymru: Broadening Horizons project, funded by the National Lottery Heritage Fund and led by WCVA in partnership with Cwmpas, aimed to enhance the resilience and sustainability of micro, small, and medium-sized heritage organisations across Wales. Disability Wales, EYST (Ethnic Minorities and Youth Support Team) and Pride Cymru were also delivery partners. The project consisted of several strands: coaching, learning programmes, widening networks, and community grants. Through these initiatives, the project sought to broaden income streams and reach new audiences, including underrepresented / minority community groups.

**Coaching** was a primary focus, providing tailored coaching support to 19 heritage organisations. This support included fundraising, strategic planning, governance enhancement, and marketing and communication improvements. All participating organisations being very complementary about the support provided and identifying improvements within the organisation. Capacity issues within organisations often led to delays and high dropout rates, particularly among smaller organisations with limited staff and volunteer capacity.

The **learning programmes** delivered 16 courses which were attended by 168 people. These covered topics such as enterprising leadership, income generation, and safeguarding. Feedback indicated high participant satisfaction, with significant increases in knowledge and confidence. Participants valued the interactive elements and practical resources provided, though some desired more tailored content and extended learning opportunities.

**Widening networks** involved hosting visits to heritage sites by Disability Wales, EYST, and Pride Cymru. Despite logistical challenges and low participation, these visits fostered community engagement and raised awareness of heritage projects. However, the potential for broader learning about inclusivity and barriers faced by underrepresented groups was not fully realised. The project also delivered networking events, attracting 43 participants from 33 heritage organisations, which facilitated knowledge sharing and collaboration.

The **community grant scheme** awarded 15 grants, averaging £1,800, to support various projects. These grants enabled improvements in physical access, volunteer training, and the creation of educational displays. These small grants demonstrated significant impacts in enhancing community engagement and broadening organisational reach.

Overall the coaching support helped organisations develop strategic plans, enhance governance, and create effective fundraising strategies, leading to greater confidence and success in fundraising together with improved operational efficiency. Training sessions increased participants' knowledge and confidence, equipping them with practical skills to help reach the organisations goals. Although there were challenges such as capacity limitations and administrative burdens, the project enabled valuable learning and development opportunities.

Widening networks events and community grants fostered greater inclusivity and engagement, enabling organisations to reach new and diverse audiences, these have led to new connections and opportunities for future initiatives.

Building upon the success of the previous programmes, the Broadening Horizons project successfully strengthened the heritage sector in Wales, promoting long-term sustainability and inclusivity

## 2) Introduction

### a) Methodology

The evaluation has been conducted over the duration of the project, with information supplied by WCVA and additional information gathered from the following sources:

#### Coaching Strand

- Before and after support statements from organisations receiving support
- Coach reports
- Semi-structured interviews with individuals receiving coaching
- Discussions with coaches

#### Learning Programme Strand

- Evaluation forms from training/workshops

#### Widening Network Strand

- Visit evaluation forms

#### Community Grant Strand

- End of grant reports from organisations
- Expenditure profiles of grants
- Feedback from grant recipients

In addition, semi-structured interviews were undertaken with delivery partners:

- Pride Cymru
- Eyst
- Cwmpas
- Disability Wales

Due to capacity issues, six organisations were unable to complete/provide the evaluation data within the project timeframe.

### b) Project Description

**Project Overview** The project follows the previous Catalyst Cymru: Resilient Heritage project, which ran from Dec 2018 – May 2021. This new project, Catalyst Cymru: Broadening Horizons, is again a pan-Wales project that aims to help micro, small, and medium-sized heritage organisations or organisations undertaking a heritage project become more resilient and sustainable by broadening their income streams and reaching new audiences and people (staff/volunteers/board members). It is funded by the National Lottery Heritage Fund (£248,600) and led by WCVA in partnership with Cwmpas (formerly Wales Co-operative Centre).

**Timescale** The project was initially due to run between July 2021 – June 2023, but an extension was agreed upon in June 2022 to provide an additional £97,913, extending the project until June 2024. This enables an additional 12 organisations to receive coaching, extended the community grants to 25 and expanded the Widening Networks activities.

**Project Elements** The project consisted of the following strands:

**Coaching:** Delivered health checks and provided four days of free coaching support over a period of up to eight months to 25 heritage organisations or organisations undertaking heritage projects. This increased to 37 organisations with the project extension.

**Learning:** Included a training programme delivered with Wales Cooperative Centre covering topics such as Enterprising Leadership, Rethinking Income Streams, and demonstrating social impact, alongside additional training delivered by WCVA.

**Widening Networks:** A range of events and activities were delivered in conjunction with EYST, Pride Cymru, and Disability Wales to support more people to become involved in heritage. This also included heritage organisations and organisations running a heritage project hosting visits on their sites.

**Community Grants:** Small grants were offered to heritage organisations or organisations undertaking a heritage project to deliver the actions identified in health checks/coaching sessions and the widening networks activities.

**Legacy Toolkit:** Developed based on the learning from the widening networks activities to support other heritage organisations' work to increase diversity within their organisations.

**Resources to Deliver** WCVA recruited a Catalyst Officer for the duration of the project. External resources included consultants and training/delivery partners. The initial postholder left in September 2023, with an interim manager in place until a new officer was appointed in January 2024.

**Consultants and Partners** The project recruited 15 consultants from across Wales with a broad range of skills and experience in supporting heritage/third sector organisations. This included consultants who had provided support during the earlier Resilient Heritage project.

**Delivery Partners** Cwmpas was the main delivery partner, providing training and undertaking some of the coaching support. Three organisations were enrolled to support the delivery of the Widening Network Strand:

- EYST
- Disability Wales
- Pride Cymru

### **c) Expected Outcomes**

The outcomes for the project were:

- 25 voluntary heritage organisations will receive the organisational health check and coaching.
- 200 people will attend the training courses.
- 30 unique voluntary heritage organisations will engage with the Widening Networks activities.
- 15 voluntary heritage organisations will offer some sort of engagement activity (e.g., taster sessions) for individuals from under-represented groups.
- 15 recipients of community grants in support of development actions.

Following the extension, these were amended as follows:

- An additional round of coaching for 12 organisations.
- An additional 10 community grants (total of 25 for the project)
- 10 additional voluntary heritage organisations engaging with Widening Networks activities.
- 5 additional voluntary heritage organisations offer some sort of engagement activity
- £10,000 additional budget for small grants

### 3) Coaching

Coaching was the main element of the support provided to organisations. This consisted of four days of support from a coach selected and matched to the organisation’s needs. Organisations were required to complete a short application form to access the project support; those accepted then undertook a health check to help identify their needs before being matched with the coach.

#### a) Participating Organisations

Clear eligibility and selection criteria were set up to recruit organisations onto the programme. This included their legal status, heritage focus, size of organisation, and importantly, a buy-in from the whole organisation to make the time commitment required to undertake the coaching and associated work and to commit to attending the initial Introduction to Enterprising Leadership, a two-day programme.

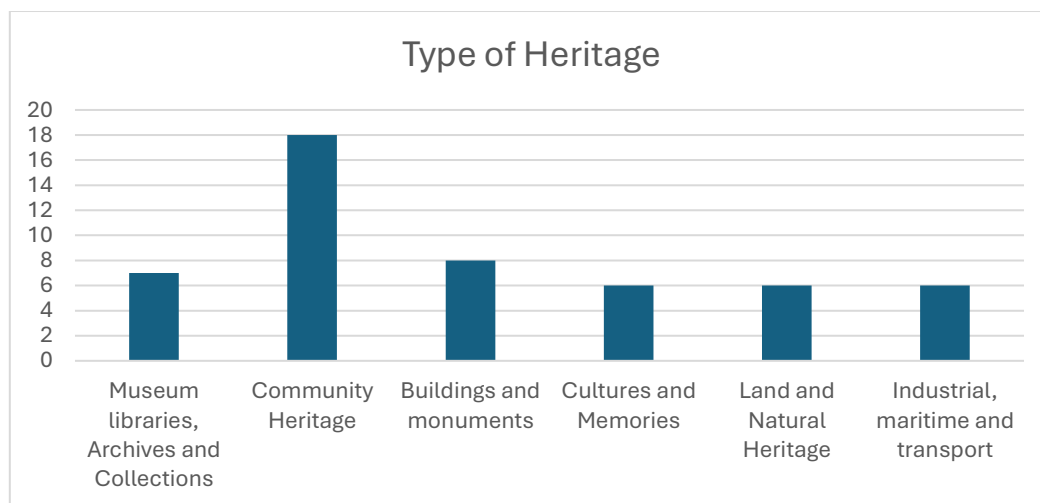


Chart 1: Type of Heritage of Participating Organisations

Organisations covered a variety of heritage types, with an even spread over different categories. Organisations ranged in size from an income under £5,000 to over £1 million (financial information for six organisations was not available). Fourteen had an income under £100,000, with five having an income over £500,000. None of the groups with the lowest incomes (under £12,500) completed the coaching, and seven out of eight with an income under £20,000 did not engage or begin the support. Six of the organisations had received support from the earlier Resilient Heritage project, and one organisation ceased trading since the coaching support ended.





Organisations were recruited in three cohorts so as not to overwhelm the administration and health check process. The first round took place in October 2021, the second in April 2022, and the third in September 2022. Initial take-up was high but slowed for the second and third cohorts, requiring more promotion.

All organisations applying were selected, 30 undertook the health check and were assigned a coach, and 19 completed the coaching. This is a very high dropout/incompletion rate for the coaching support. The main reason seems to be a lack of capacity to engage, especially for the smaller groups. Coaches, once appointed, were unable to get the organisations to engage or respond to contact. Others were

very slow in being able to undertake/implement actions, and work had not been completed by the end of the project.

Although organisations were given eight months to complete the coaching, many needed longer to finish the work. This was invariably due to the capacity of the organisations to follow through on the actions identified in the coaching. Smaller organisations struggled the most with capacity issues, some having no paid staff and relying on volunteers to action/implement coaches' recommendations and suggestions.

## **b) Administration**

The onboarding and general administration were very well received, and no problems were reported. The application process for the programme raised no issues. All organisations were advised at the outset of their requirements to engage with the process. However, this was underestimated by organisations when confronted with the reality of what was involved.

## **c) Health Check**

The health check formed an important and valuable aspect of the coaching support. It consisted of a detailed questionnaire completed with staff/board members from the organisations and served multiple purposes:

- Identified priority coaching areas for support.
- Revealed areas of weaknesses previously unidentified.
- Gave confidence to organisations that they were doing things correctly.
- Identified differences in knowledge/understanding between board and staff.

While organisations all acknowledged the value of the health check, they also found it to be a lengthy process (this was consistent regardless of size), taking 2-3 hours to complete. For organisations that had completed the check before, there was a mixed view – some saw it as duplication as they already knew areas for development, while others saw it as a useful way to track progress and ensure they were doing things right.

The health check was useful in confirming what was thought about the organisation’s strengths/weaknesses and identifying additional areas for development. However, with just four days of support available, it was only feasible for one or two areas of development to be addressed.

As part of the health check, groups were asked to answer evaluation statements at the start and on completion of the coaching, scoring each out of five. The first graph below shows average before and after scores, and the second graph shows the average gain in the score (scores rounded up to one decimal point).

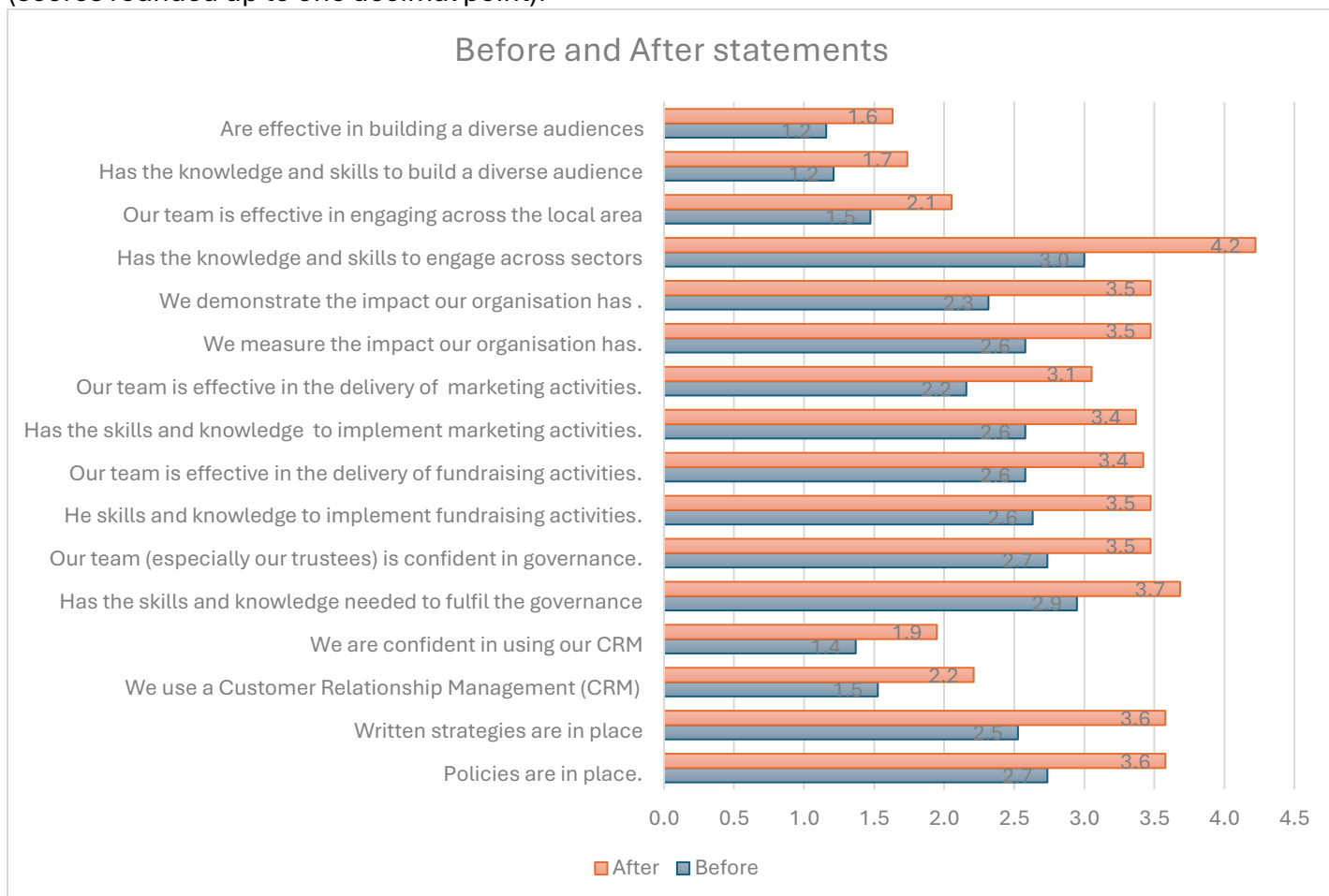


Chart 2: Average Before and After Statements of Organisations

The statements reflect a healthy cohort of organisations, with most statements scoring over 2.5/5. The weakest areas (under 2) were the use of CRMs and the ability/skills to build diverse audiences (including staff, supporters, trustees, and volunteers). It is interesting that there is this low score considering high average scores in the organisation's ability to engage across sectors.

After coaching, the average scores increased to 3.5/5. CRMs and the ability/skills to build diverse audiences also increased (0.6) but less than the average score, which was 0.8. The biggest gains (1.2) were seen in the organisation’s knowledge and skills to engage across sectors, ability to demonstrate impact, and having all policies in place. Fundraising scores improved relatively well (0.8) and was the area in which most groups sought coaching support.

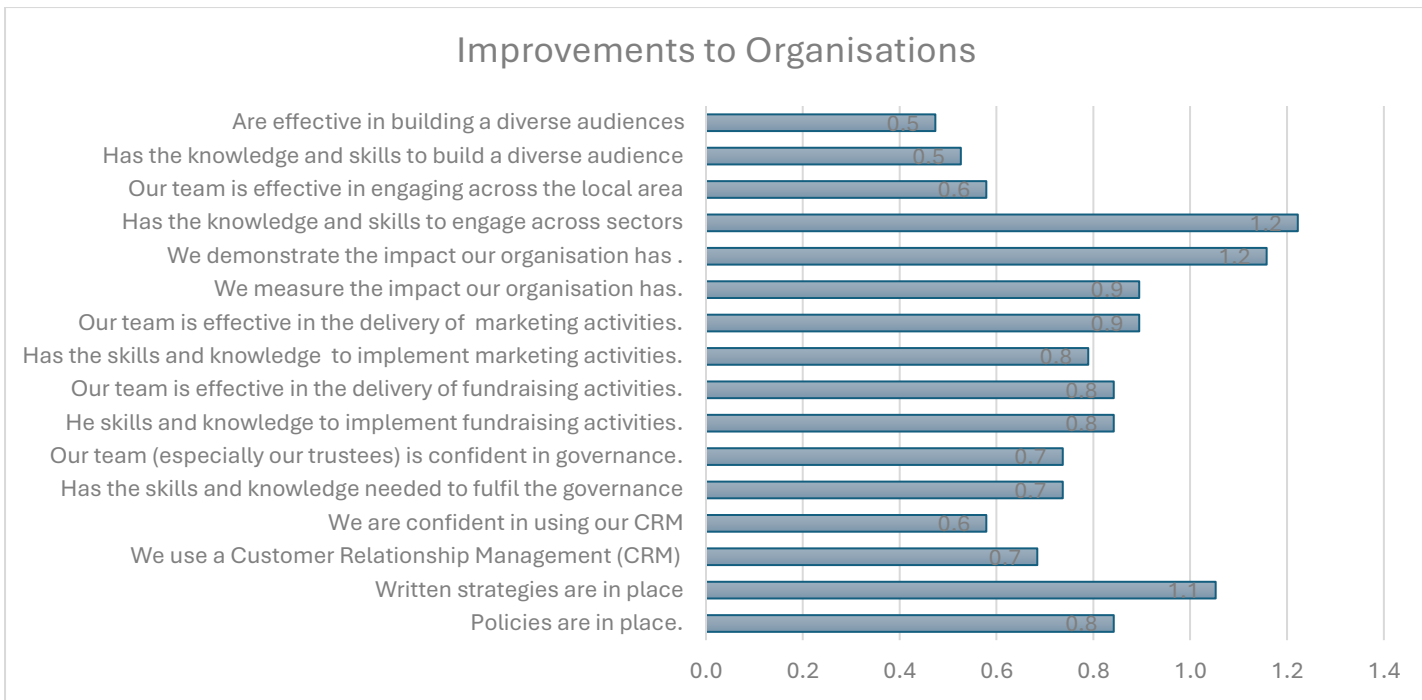


Chart 3: Average Improvements in Score for Evaluation Statements

#### d) Coaching Delivery

The coaching supported organisations in addressing several themes as shown below.



Chart 4: Areas of Coaching Support

**Fundraising:** The most common area of support was fundraising, where coaches worked with organisations to develop comprehensive fundraising strategies that included identifying potential donors, crafting funding proposals, and diversifying income streams. This included training and guidance on how to approach different types of funders, including government grants, private foundations, and corporate sponsorships. Some coaches also helped implement new fundraising tools and technologies, such as donor management systems or online fundraising platforms, to enhance fundraising efforts.

**Llanelli Railway Goods Shed Trust:**

The coach was brought in to specifically aid in developing fundraising capabilities and enhancing their case for support. The coach worked closely with the Project Coordinator, who was at the time the sole employee of the trust. The coach helped create a comprehensive funding plan, which included identifying potential funding sources and preparing detailed funding bids. Specific attention was given to several key grant applications:

**National Lottery Heritage Fund, Local Places for Nature:** This application was successful, with the trust being awarded £98,000. The funding was intended to help restore the natural environment around the goods shed and enhance local biodiversity.

**Moondance Foundation:** Another successful application resulted in just under £21,000 awarded, which supported operational costs and some project-specific activities.

**Volunteering Wales Grant:** Though this application was unsuccessful, it provided valuable experience in grant writing and strategic planning for future applications.

**National Lottery Community Fund, Awards for All:** This application was pending at the time of reporting but aimed to secure just under £9,000 for small-scale community engagement activities.

**Business/Strategic Planning:** The next most common support was in planning (strategic and business), where the coaches helped organisations develop or refine their plans, which included setting clear organisational goals and aligning daily operations with long-term objectives. This also involved assisting in defining or revising the mission, vision, and values to ensure they reflect current objectives and market conditions. Facilitating workshops and meetings to engage stakeholders in the planning process was common practice throughout.

**Governance:** Coaches worked to strengthen organisations' governance structures. This included conducting skills audits to identify gaps in board capabilities and developing recruitment strategies for new board members. Training and workshops were provided to enhance the skills of existing board members, ensuring they were well-equipped to fulfill their roles effectively. This support included helping to develop or improve existing governance policies and procedures, ensuring compliance with legal standards and best practices.

**Marketing and Communications:** Assistance in developing marketing and communications strategies was also a common area of support and included identifying key messages and target audiences to enhance visibility and impact. The coaches helped organisations leverage digital marketing tools, social media, and traditional media to reach a broader audience and engage more effectively with stakeholders. Guidance was also provided on creating content that resonates with different audiences, improving the organisation's overall communication effectiveness.

Coaches reported the work as being rewarding, often highlighting the success of specific initiatives such as securing significant funding, completing strategic plans, or effectively implementing new systems and processes. These gave tangible outcomes and were a major highlight, confirming the effectiveness of the coaching process. Several coaches noted the enthusiastic and productive collaboration with staff, board members, and volunteers of the organisations. This includes seeing the commitment and passion of the teams, which made the engagements rewarding. This developed through the various support in planning, training, or idea-sharing events. The coaches were able to help organisations focus on what was important and help them achieve meaningful outcomes.

**Ymdeithas Eryri / Snowdonia Society:**

The Snowdonia Society is dedicated to the protection and enhancement of Snowdonia’s beauty and heritage. However, they faced the challenge of aligning their diverse activities and interests of members and stakeholders to effectively address emerging conservation challenges. The coach was engaged to facilitate a strategic planning process aimed at refining the Society’s focus and improving its effectiveness. The process was designed to be inclusive, involving staff, trustees, and volunteers to ensure broad perspectives were considered.

This began with a “Stop/Start/Continue” review session to identify current practices worth maintaining, starting, or stopping, followed by Theory of Change Workshops allowing deep discussions about the organisation’s long-term goals and the strategies required to achieve them. These discussions were crucial for aligning the team around a shared vision. The workshops also served as an integration and team-building opportunity, helping new members to quickly come up to speed and contribute effectively.

Coaches highlighted their own learning experiences, noting that the diverse challenges and solutions across different organisations provided them with new insights and professional development. They also appreciated the opportunity to help organisations enhance their engagement with communities and stakeholders, seeing firsthand the positive impact on community relations and support.

**e) Challenges**

The coaching was however not without its challenges; by far the biggest was the limited capacity within organisations, often due to small staff sizes or overextended team members. This limitation affected the ability to implement changes, sustain new practices, and manage additional projects alongside day-to-day operations.

**Delayed Projects and Initiatives:** Organisations experienced delays in the implementation of projects and initiatives due to insufficient staff and volunteer resources to carry out planned activities.

**Volunteer and Staff Burnout:** Overstretching staff and volunteers led to burnout, reducing overall productivity and morale. This also impacted staff retention, as the high demands placed on a few individuals were unsustainable in the long term.

For one group having just the single point of responsibility meant that the bulk of the responsibilities, particularly regarding business planning and strategic development, fell on one individual, which created an unsustainable workload. This was compounded by a lack of Board Support who were not sufficiently engaged in supporting the staff member. Despite multiple attempts by the coach to involve other board members, there was little progress. Ultimately the organisation made very little progress developing their business plan and advancing their strategic goals. This stagnation was a direct result of the burnout and overextension of their key staff member. This also highlights the significance and importance of having the board fully behind and engaged with the coaching process and shared responsibility.

Some organisations found it challenging to maintain regular communication which delayed actions and progress with coaching. In other instances a lack of capacity and the time-consuming nature of grant applications and fundraising efforts meant that organisations with limited capacity missed out on potential funding opportunities; unable to dedicate the necessary resources to identify, apply for, grants.

### **i) Organisation's Feedback**

In all cases, the coaching met (60%) or exceeded (40%) the expectations of the organisations, and the match to the consultant was identified as being a good fit. All organisations found that their coach was quickly able to relate to their organisation and challenges. The coaches were found to be sensible, knowledgeable, and enthusiastic, able to help keep organisations focused on their tasks and input new ideas and perspectives.

For all the organisations, the fact that the support was free was important; most simply did not have the funds for such support. The motives for applying included those who had help from the past Catalyst project, recognising the past benefits and wanting to address additional areas of development, seeking new ideas and direction, taking advantage of any help to develop the organisation as a small group, and using the opportunity to engage/broaden trustees.

In all cases, the coaches were found to be excellent communicators; able to quickly build empathy and get to the 'nitty gritty' of issues. In one case, they were also successful in helping get a reluctant trustee board to engage and help spread the workload. Coaches took on different roles within the organisations: critical friends, safety nets, and informal support. For several organisations, they are still in contact with their coach. Although COVID-19 meant that much of the support was delivered online, this was not found to be a problem (the lack of need to travel worked well in many instances as it gave more contact time with the organisations).

The coaches brought much-added value beyond that of the coaching support; this included identifying businesses that could help develop a project, creating/providing template documents/letters of support, linking to their contacts, and the most commonly cited added value was in giving them confidence – whether this was to apply for funding, ask for donations, or in their ability to deliver. Having an outside person validate ideas/plans was very reassuring.

*“We were a ship without a rudder - we knew where we wanted to go, but not how to get there”*

*“...got us all working well together and able to see the wood for the trees”*

*“The coaching support we received was transformational.”*

The one underlying and common issues for organisations was that of time. They consistently struggled with the time to implement ideas and actions that were identified. This was a lack of staff and board time to undertake work which was more than they expected/anticipated. There were also more actions identified from the health check than was possible within the four days of support.

The high dropout rate is indicative of these time pressures. A few organisations suggested that future schemes need to give time to the supported organisation to resource their ability to implement actions. The actions being implemented were additional to their existing workload and unfunded, so taken from their core budgets.

In undergoing the coaching, 40% of organisations identified additional problems within the organisation – one described it as opening “Pandora’s Box”. While loosely aware of other issues, it was not until there was the focus to look at them in more depth that the extent of work that was needed was identified. Another organisation recognised that they needed to “go back a few steps” and improve their foundation before trying to be too ambitious.

## **f) Training**

All participants were required to attend the two-day Introduction to Enterprising Leadership course. However, only two-thirds could remember attending; with two saying they did not attend (this applied to organisations joining the programme in the final cohort and having no course available to them). Of those attending, 70% felt this complemented the coaching provision, although several found that it was challenging being delivered via Zoom.

Participants felt that it provided good background and helped them understand the wider funding picture in Wales. It helped in developing their business/enterprise activities, giving motivation and ideas they could take forward. There was some feedback that it felt too basic and did not feel appropriate to their organisation, as it had too much of a generic/one-size-fits-all approach. One organisation was also required to attend despite previously attending the full course on a previous occasion. This was felt to be a waste of their time, which could have been more productively spent on other activities.

The biggest impact of the online delivery was the lack of peer-to-peer engagement that this allowed; the informal ‘water cooler’ conversations could not take place. That said, a couple of organisations did meet representatives from similar organisations and have since met up and formed new links. One participant mentioned that there is always a sense of competition between organisations because they are working in the same arena and often chasing the same pots of funding, which can hinder some joint working and information sharing.

## **g) Impact of Coaching**

Six organisations felt that they would have achieved the same results without the coach's support; however, of these, five said it would have taken longer and not produced such good results. Organisations had much clearer plans/strategies in place – whether for fundraising, governance, or marketing. This was making it simpler to move forward and focus on the actions that are needed to make changes.

For one organisation, the coaching had significantly helped broaden the trustee board. Previously they felt that they were 'cloning' trustees, bringing on friends/friends of friends, essentially drawing upon the same demographic. They recruited one new trustee, having implemented a new recruitment process, and are now looking to build on this success.

### **i) Broadening Networks**

70% of organisations felt that they had a better idea of how to broaden their network. Actions undertaken so far included:

- Setting up a new photo display for the community to see the organisation's work.
- Having a new business plan in place with a greater appreciation of how to use social media.
- Looking at the local community from a new perspective and how they could be engaged, now with a focus on education.
- Undertaking more training on diversity.
- Targeting older people and dementia groups.
- Greater awareness of the benefits of working with more local groups.
- Targeting more younger people to become trustees.
- Developing an inclusion strategy.
- Joining the Heritage Trust Network.
- Meeting similar organisations to share ideas with and building links to local history groups.

The Heritage Trust Network offers a resource that could have been more strongly utilised by the project. The groups who had been introduced to them all spoke very highly, one becoming a member of the Welsh board. The Trust offers a long-term network of support and membership across Wales.

### **ii) Governance**

Coaching support around strategic planning had enabled organisations to think more professionally and develop a greater sense of ownership across the board, staff, and volunteers. The support gave boards the push they needed to take the actions that were required. The coaches were able to help engage people who had different interests and motivations for being part of the organisation.



This was well illustrated with the **Monmouthshire Brecon and Abergavenny Canal Trust**. The trustees all had different perspectives on the canal: running and maintaining boats, the engineering task of building and maintaining locks, running a café and visitor centre, the historical importance of the canal, and maintaining and conserving the environment through which the canal runs. The coach's diplomacy skills were needed to help them create a coherent strategy that encompasses all the disparate elements.

Three organisations had recruited new trustees: one gained five, another a trustee from a minority group, and a third recruited a younger trustee. Coaches made use of skills audits to identify areas of weakness in skills – IT/Marketing being one of the most common areas in which skills were needed.

**Chartist Heritage** received support from the coach to conduct a skills audit of the trustees and identify gaps and areas for improvement. This audit helped in understanding the current capabilities of the board and where new skills were needed, leading to the development of a bespoke trustee induction pack that included guidance on the roles and responsibilities of trustees based on the Charity Act, as well as specific information about the charity.

They were also able to explore different methods to recruit new trustees to increase the board's diversity. This included outreach to potential trustees through networks such as Registered Social Landlords and community activities.

### **iii) Finance**

Considering that funding was the most common area of coaching, it is not surprising that most of the organisations felt more confident in their financial resilience. Staff being more confident in their abilities; coaches helping develop applications/provide feedback on applications.

Recognising the value of their work and subsequently having the confidence to ask for donations where previously they would have delivered talks for free. A volunteer gave a talk to one group and received a £500 donation; previously they would never have had the confidence to ask.

Securing grants: several organisations secured substantial grants totalling £500,000+, and have others pending decisions, including:

- National Lottery Heritage Fund - Local Places for Nature.

- National Lottery Community Fund – People and Places.

- Moondance Foundation.

- Shared Prosperity Fund.

- £25,000 secured from a local family charitable trust.

- Developing new income sources through sponsorship.

- Having a funding plan in place to follow/targets to aim for.

## **h) Coaching Experience**

An online discussion was held and attended by three coaches, with a further four providing email/verbal feedback.

All the coaches enjoyed the support they provided and felt they were a good match to the organisations, having the appropriate skills and experience to deliver the help that was needed. Where coaching was wanted in the Welsh medium, this was able to be provided by a coach who was a fluent Welsh speaker. The diagnosis of the help needed from the health check matched the coaches' findings in delivering support, although all areas of support were not possible within the four days. However, on occasions, smaller issues were picked up and tackled as it appeared sensible to address them as part of the work, such as identifying additional strategic planning that was needed.

The amount of impact coaches felt they could have, whilst meaningful within the four days, was limited; the positive difference made being defined by the time available to make that difference. Whilst coaches felt that the organisations did have the capacity to act upon the support, their ability to do so was limited by external factors such as the frequency of committee meetings, funding pressures, and other work priorities. Coaches reported spending a lot of time chasing groups for responses and actions to be taken. A suggestion was made for a more structured work plan which would specify what the coach would do and what the organisations would do/by when.

All coaches felt that the organisations benefited from their coaching; with the products/coaching being able to help them moving forward. Coaches also felt that the organisations would benefit from the approach to work that was taken, providing more structure and focus on how they work. For many of the individuals supported, they were sole employees and found having an external person with whom they could vent frustrations, share ideas, and reflect was helpful and removed feelings of isolation.

It was felt that more could have been done by the project to facilitate shared learning. There were not enough opportunities (physical and online) to bring organisations/coaches together to reflect/share good practice.

One suggestion was that follow-up support after 8-12 months of a couple of days would help to see what had been embedded and where some additional assistance may be needed to keep the organisation on track.

Administratively, there was a noted change following the departure of the first project officer, with the project slowing down and becoming more 'relaxed'.

#### **4) Partner Organisations' Experience**

All four partner organisations enjoyed being part of the programme and learning about the range of heritage organisations within Wales. It was particularly noted how heritage initiatives were encompassed within organisations that were not specifically heritage organisations. They also learned more about each other's work and will continue to maintain working relationships. The project also introduced partners to new organisations with whom they would otherwise have been unlikely to work. A nice example of this is the collaboration between Keep Wales Tidy and EYST, which proved to be an extremely beneficial match. Environment/regeneration is the second worst area of employment for ethnic minority groups after agriculture. The link has led to an ongoing relationship and promotion work to engage more people from minority groups in recycling and the recycling industry.

For Cwmpas, the project fitted well with the other support they were providing, such as Newid, which helped their clients' support journey. More was needed to bring people together; while the visits and training provided some opportunities, there was a feeling that more could have been done to bring organisations together to share learning.

It was felt that the project became rushed in the final stages, with many visits and training being pushed through at the end, a combination of capacity issues and delays in arranging visits. Detailed risk assessments were one of the reasons organisations struggled to make arrangements, further hindered by a very wet start to the year. An impact of this was a loss of focus on the purpose of the visits; feedback was more about the activity undertaken rather than any learning about building networks and diversity. Communication also tailed off towards the end, with virtually no contact for several months in the later stages.

The training offered by partners was well-received but perhaps could have been delivered earlier in the project to give participating organisations a chance to implement the learning. There was an underestimation of the capacity of organisations to engage and respond, affecting how long things would take to organise. For some partners, the project was found to be very time-consuming, being administratively heavy with a lot of paperwork (for example, producing separate risk assessments and evaluation monitoring forms for each visit). This was not helped by the feedback link provided not working, so data could not be captured directly after the visit; follow-up contact was not easy and did not yield high results.

It was suggested that WCVA could have simplified the workload by doing more of the selection of organisations, perhaps not all four partners were needed for each assessment. Reading applications, interviews, and selection were all very time-heavy.

Their only issue with the scheme was the amount of time needed for each visit – very time-consuming, with risk assessments, evaluations, etc. They considered pulling out due to the excessive time required but could see the value to their community and persisted with the project. This was only possible because they are a relatively large organisation and could split responsibilities across several people, but for a small group, this would have been a significant burden.

## 5) Training

### The Courses

Feedback was provided for the following training courses delivered over the course of the project; a total of 16 courses and 168 attendees.

2022		
Introduction to Enterprising Leadership	March and April	10
Introduction to Enterprising Leadership	July	11
Rethinking Income Streams	November and December	15
2023		
Measuring Social Impact	February	14
How to recruit diverse board members (Webinar)	February	19
How to recruit diverse board members - master class series	February and April	13
Developing an Enterprising Mindset	July	14
Income Generation	November	18
Business Planning	December	5
2024		
How to Make Your Organisation More Innovative	February	3
Innovation Tools and Techniques	March	8
Measuring Social Impact	April	9
Safeguarding for Volunteers	May	18
Lead with Impact: Strategies for Effective Leadership	May	8
Mastering Digital Fundraising & Marketing	May	9
The Art of Inspiring Storytelling	May	7
		<b>168 total</b>

The main purpose was to increase knowledge and confidence. All but two courses scored 90-100% of participants identifying an increase in confidence and knowledge. The lower-scoring courses were the webinar and masterclass on Recruiting Diverse Board Members. The webinar was felt to lack detail, and the masterclass was not focused enough on Wales.

**NB:** There was a change in the feedback form at some point during the project, which has made it impossible to provide aggregated data across all training. In all, five different evaluation sheets were used for the different courses.



Diagram 1: Word Cloud – “One word to describe training”

### Common Themes Across Training Sessions

Participants identified increased confidence and competence in the respective subject areas, whether it was digital fundraising, storytelling, leadership, or other topics. The high quality of training delivery, with the knowledge, ability, and engagement skills of the trainers, was frequently highlighted as key factors contributing to the success of the sessions. Participants particularly appreciated trainers who could break down complex topics into understandable segments and who facilitated interactive and participatory learning environments. Interactive elements such as group discussions, practical exercises, and real-life examples were consistently valued by participants, helping to apply learning in practical contexts. Participants appreciated trainers providing resources such as templates, frameworks, or tools that could be directly applied within their organisations.

However, some participants would have liked more tailored content that more closely aligned with their specific roles or organisational work. Other suggested improvements included having more time for in-depth discussion and extended breakout sessions. Participants also asked for ongoing learning opportunities beyond the initial training sessions, such as follow-up webinars, 1:1 coaching, or additional training on advanced topics. This suggests future opportunities for more detailed/comprehensive learning programmes that would allow topics to be studied in more detail.

The overall impact of the training sessions was positive, with high levels of participant satisfaction and a strong likelihood of recommending the sessions to others. Feedback often reflected a sense of renewal and inspiration, suggesting that the training not only delivered skill enhancements but also motivated participants to engage more deeply with their work.

## 6) Widening Networks

### a) Host a Visit

Disability Wales, EYST, and Pride Cymru each led visits to a range of heritage sites for their members/community groups; Disability Wales held seven visits, with Pride Cymru and EYST both organising five.

#### Disability Wales

- Denmark Farm
- Royal Commission
- St John's House
- Hay Castle
- Spinnies Nature Reserve
- Pembrokeshire Coast National Park (no takers – due to distance)

#### Pride Cymru

- Seagrass Project
- Snowdonia
- Our Chartist Heritage
- Heneb

#### Eyst

- Tywi Gateway Trust
- Keep Wales Tidy
- Conwy Culture Centre



Diagram 2: Word cloud “One work to describe the visit”

Very few evaluation forms were received (EYST reported a broken link to the online form on the day). Feedback was received from 34 participants across all visits. Although numbers were low, those attending did enjoy the visits.

There was a lot of preparation needed for each visit, each requiring its own risk assessment. Additional barriers, such as arranging transport, distance, and delivery in the winter with poor weather, resulted in lower uptake.

The broadening networks aspect of the project was somewhat lost; opportunities to learn more about inclusivity and the specific barriers people face were not sought. The monitoring/feedback form could have been more explicit in the questions it asked, and the purpose of visits more clearly explained to participants to get their insights on engagement with heritage projects. For example, Pride Cymru had a lovely day planting seagrass, which, while providing a somewhat invigorating day, did not produce much learning.

Overall, it felt like a bit of a missed opportunity. The effort put into arranging the visits was not reflected in the levels of participation. These were arranged hastily towards the end of the project; perhaps if planned earlier on and for summer visits, the uptake would have been better.

The widening network events held in June and November 2023 attracted 43 participants, representing 33 heritage organisations. All attendees agreed or agreed strongly that their knowledge of EYST, Pride Cymru, and Disability Wales had increased. Sessions were found to be engaging and informative, enabling people to share information and ideas that could be introduced on their own sites.

*“I really enjoyed the session. It was clear, concise, and well organised.”*

*“I was able to see how I could engage with each organisation to better my community engagement and consultation work in Wales.”*

*“Great session, really clear, lots of good input from everyone.”*

## 7) Community Grant

The Community Grant scheme was launched on 28th March 2023 and designed to provide a simple application process for organisations involved in the project to access a small sum of money to progress an idea or project arising from the coaching, training, or visit.

Eighteen organisations applied, and 15 grants were awarded, with the largest grant being £3,000 and the smallest £774, with an average of £1,800. The grants were spent on a range of projects, from capital purchase of equipment to volunteer training and production of photographic displays.

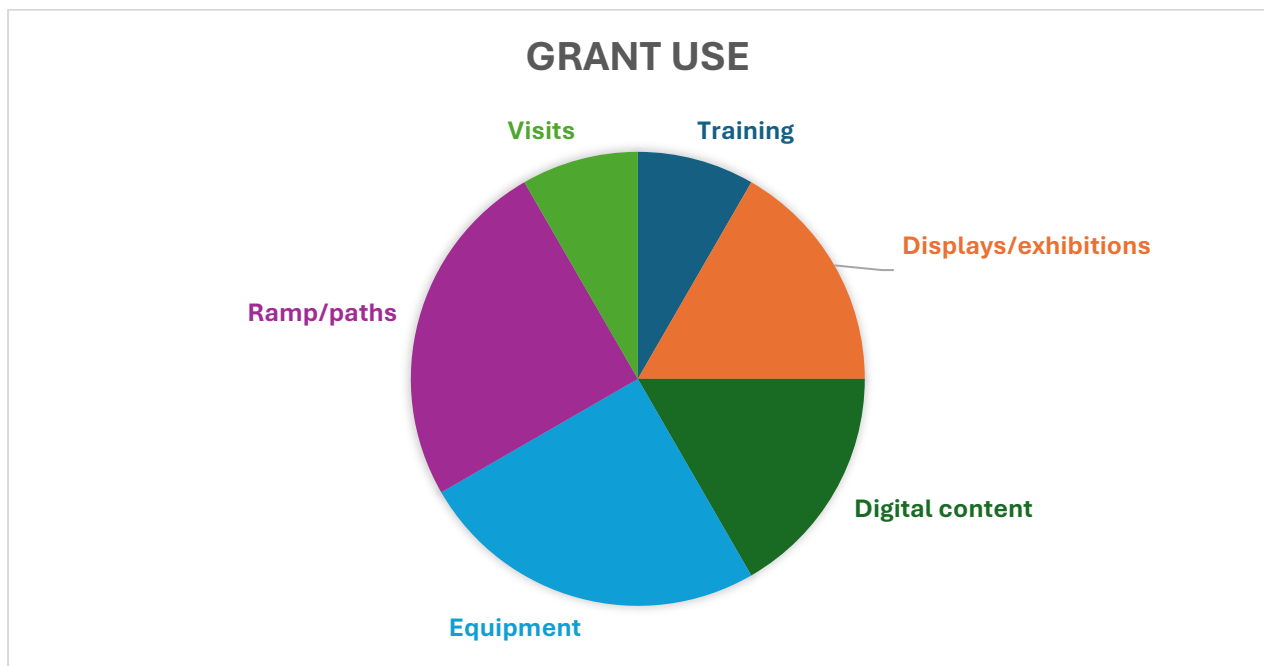


Chart 5: Mini Grant Use

These small grants enabled organisations not part of the Coaching programme to benefit from the project; nine recipients were not part of the coaching scheme. Initiatives included improvements to physical access, such as new boardwalks and pathways that allow people with poor mobility to access more areas of nature reserves and onsite facilities. They also funded the creation of a display for the Jewish Heritage Association in South Wales, enabling them to take bilingual information banners to engage with six new community areas.

These small grants provided a quick and easy route to securing additional funds that have improved access to heritage, both physically and digitally. Relatively small sums of money have enabled fairly significant benefits for reaching new audiences and achieving the aims of the organisations.



**Grant Recipient:** Circus Eruption

**Location:** Swansea

**Grant:** £3,000

**Project Overview** Circus Eruption, a small inclusion charity, accessed the Coaching project to help them revitalize a Grade II listed building and enhance its fundraising capabilities through showcasing the charity's heritage journey, engaging new audiences, and increasing donation income through innovative technologies.

**Activities and Technological Advancements** The grant enabled the creation of two short films and the installation of a contactless donation system. The films, titled 'Our Story' and 'Our Future,' highlight the charity's progress from acquiring a deteriorating former church to its plans for future development into a training hub for heritage skills. These films were produced to reflect the transformation and potential of the space, focusing on sustainability and community involvement.

#### **Impact and Outcomes**

"We couldn't be happier with the final outcomes... and we can't wait to launch the short films - they're amazing."

**Heritage Preservation:** The films documented the restoration of a historically significant building, fostering a broader appreciation for local heritage.

**Community Engagement:** By featuring volunteers, staff, and local professionals, the films serve as a testament to the community's involvement and commitment to the project.

**Financial Innovation:** The introduction of a contactless donation system marked a new fundraising approach for the charity, raising over £360, with aspirations to exceed £1,000.

**Challenges and Adaptations** A major challenge encountered was the wealth of footage exceeding the scope of two short films, prompting plans to seek additional funding for further productions. The filming process revealed the enthusiasm and engagement of participants, yet some key contributors were unavailable during filming, highlighting the need for flexible scheduling in future projects.

**Financial Accountability** The project demonstrated prudent financial management with a slight underspend, which the charity opted not to adjust. This decision underscores their effective use of funds and commitment to fulfilling project goals without unnecessary expenditures.

**Conclusion** Circus Eruption's project exemplifies how small grants can be instrumental in preserving heritage while innovating in community engagement and fundraising. The successful integration of digital media and technology into heritage projects offers a replicable model for other charities looking to broaden their impact and outreach.

**Grant Recipient:** Project Seagrass

**Location:** Hafan y Mor, Pwllheli

**Grant:** £2,740

**Project Overview** Project Seagrass utilized their small grant to facilitate a community-based environmental initiative involving the restoration of seagrass in North Wales. The project engaged volunteers through a collaboration with Pride Cymru, focusing on the intertidal planting of seagrass seeds using innovative Dispenser Injection System (DIS) methods.

**Activities and Volunteer Engagement** Volunteers participated in a day of seagrass planting activities, with each volunteer planting approximately 1,600 seagrass seeds, contributing to the overall goal of seeding 350,000 plants. The day included training, equipment provision, and support, ensuring a safe and engaging experience for all participants.

**Impact and Outcomes** The seagrass planting initiative had multiple significant outcomes:

**Environmental Contribution:**

Approximately 350,000 seagrass seeds were planted, which will be monitored for growth and ecosystem impact.

**Community Engagement:** Volunteers gained firsthand experience in marine conservation, enhancing their understanding and appreciation of seagrass ecosystems.

**Educational Outreach:** Participants left with increased awareness, potentially influencing community perceptions and behaviours towards marine conservation.



**Challenges and Adaptations** Despite initial challenges, such as lower volunteer turnout than expected and logistical adjustments due to seasonal considerations, the project adapted by enhancing volunteer comfort and altering their recruitment strategies. Feedback from participants suggested improvements in pre-event information and physical preparation advice, which will be incorporated into future projects.

**Financial Accountability** Project Seagrass reported an underspend of £353.11, attributed to seasonal adjustments in equipment needs. The Project Seagrass initiative underlines the value of small grants in fostering community involvement and environmental stewardship. The project not only achieved ecological impact but also strengthened community ties to the natural world.

**Grant Recipient:** Tywi Gateway Trust  
**Location:** Parc yr Esgob, Carmarthenshire  
**Grant:** £774

**Project Overview** Tywi Gateway Trust delivered a project aimed at engaging a hard-to-reach segment of the community through a collaboration with the Ethnic Youth Support Team (EYST). The initiative was part of the Parc yr Esgob Walled Garden Project's development phase, aiming to introduce the park and its heritage elements to new audiences, particularly the BAME community, and gather their input on the project plans.

**Activities and Community Engagement** A specially tailored event was organised for 30 participants from EYST, including adults and children, focusing on inclusivity and family participation. Activities included guided tours of Parc yr Esgob and its walled garden, interactive educational sessions at the Carmarthenshire Museum located within the park, and hands-on experiences such as planting and scarecrow making. The event was designed to be family-friendly and accommodate the needs of the participants, providing an indoor venue and activities due to inclement weather.

### **Impact and Outcomes**

**Cultural and Environmental Education:** Participants were introduced to local heritage crafts and agricultural practices, which resonated particularly well with those from rural backgrounds.



**Community Integration and Volunteer Recruitment:** The event not only fostered a sense of community among participants but also led to several expressing interest in volunteering, thereby enhancing community ties and potential workforce integration.

**Stakeholder Engagement:** One of the EYST staff members joined the stakeholder group for their HLF Walled Garden project, indicating a strengthened partnership and ongoing collaboration.

**Challenges and Adaptations** The primary challenge was adapting a planned summer outdoor event to winter conditions, which necessitated a shift to indoor activities. This adjustment highlighted the need for flexible planning and ample indoor space to accommodate such events throughout the year. Despite these challenges, the event received highly positive feedback, which underscored the effectiveness of the Trust's approach to community engagement.

**Financial Accountability** The project managed its resources effectively, with adjustments made for unexpected weather impacting the initial budget. The Tywi Gateway Trust's initiative exemplified the transformative impact of small grants in bridging cultural gaps and fostering inclusivity through heritage conservation. By integrating diverse community segments into the heritage sector, the project not only enhanced cultural appreciation but also promoted social integration and volunteerism

## 8) Conclusion

The Catalyst Cymru: Broadening Horizons project, has helped to build the resilience, sustainability, and inclusivity of heritage organisations across Wales. This was achieved through the provision of tailored coaching, training programmes, and community grants, and benefitted a wide range of micro, small, and medium-sized heritage organisations.

**Coaching** was the central component, providing carefully tailored support that addressed strategic planning, governance enhancement, fundraising, and marketing needs. Delivered by carefully selected coaches/consultants, this was a highly valued and popular area of support. The success stories, such as the Llanelli Railway Goods Shed Trust securing significant grants and the Snowdonia Society developing an inclusive strategic plan, underscore the transformative impact of this coaching. Despite challenges, particularly among the smallest organisations with limited capacity, the coaching helped organisations develop clear, actionable plans and build a foundation for future growth.

The **learning programmes** complemented these efforts by equipping participants with the skills and confidence needed to further their organisational goals. The 16 courses offered, attended by 168 participants, covered topics including enterprising leadership, board diversification and income generation. High levels of satisfaction and reported increases in knowledge and confidence highlight the effectiveness of these sessions. The interactive elements and practical resources provided by the trainers were particularly valued, although some participants desired more tailored content and longer sessions.

**Widening networks** initiatives helped foster community engagement and inclusivity. Visits to heritage sites organised by Disability Wales, EYST, and Pride Cymru, though logistically challenging, facilitated valuable community interactions and raised awareness of heritage projects. Networking events attracted 43 participants from 33 heritage organisations, promoting knowledge sharing and collaboration. These events demonstrated the potential for broadening organisational reach and engaging diverse audiences.

The **community grant scheme** provided 15 grants, averaging £1,800, to support various projects. These grants enabled significant improvements, such as enhancing physical access, volunteer training, and creating educational displays. Projects like Circus Eruption's digital media initiatives and Project Seagrass's environmental conservation efforts exemplified the impactful use of these funds.

Despite facing challenges such as capacity limitations, administrative burdens, and communication issues, the project successfully delivered support to heritage organisations. The feedback from participating organisations was overwhelmingly positive, with many reporting that the project met or exceeded their expectations. The support provided was crucial in helping them develop clearer plans, enhance governance, and improve financial resilience.

## 9) Recommendations

### Enhanced Capacity Building Support:

- **Extended Support Duration:** Consider extending the coaching support beyond four days to allow for more comprehensive development and implementation of strategic initiatives. To work with less organisations but more in depth
- **Additional Resources:** Provide additional resources such as part-time project assistants or volunteers to help smaller organisations with administrative tasks and follow-up actions, ensuring they can fully benefit from the support offered.

### Early and Structured Engagement:

- **Advance Planning:** Start planning visits and activities earlier in the project timeline to avoid the end-of-project rush and ensure higher participation rates.

### Improved Monitoring and Feedback Mechanisms:

- **Consistent Feedback Tools:** Use a consistent feedback form throughout the project to enable better aggregation and analysis of data across all activities.
- **Explicit Feedback Questions:** Design feedback forms to include explicit questions about inclusivity, barriers faced by participants, and suggestions for improvement to gather comprehensive insights.

### Tailored and Flexible Training Programs:

- **Customised Training Content:** Offer more tailored training sessions that closely align with the specific needs and roles of participants and their organisations.
- **Flexible Delivery Formats:** Provide training in various formats, including in-person, online, and hybrid models, to accommodate different preferences and ensure accessibility.

### Stronger Emphasis on Networking and Collaboration:

- **Regular Networking Opportunities:** Organise regular networking events throughout the project to facilitate continuous knowledge sharing and collaboration among participating organisations. And to consider linking in with the Heritage Network Trust to offer a long term support network.
- **Shared Learning Platforms:** Create an online platform where participants can share experiences, resources, and best practices, fostering a sense of community and mutual support.