

Learning Report

Study Visit to Wales and England

20-24 May 2019



Overview of the Study Visit

The second Innocastle Study Visit took place in Wales and England from 20-24 May 2019. It was organised by the National Trust with support from the International National Trusts Organisation (INTO) and included four Site Visits, a Thematic Seminar, Partner Meeting and Peer Reviews. The full Programme can be found in Appendix 1.

The first day (21 May) began with a Partner Meeting where Partners and Stakeholders presented some of the issues they would like to address in their Action Plans, which were discussed with the Stakeholders present. After lunch, the group had a tour of the National Trust's Powis Castle grounds with the Head Gardener, David Swanton, and then of the Castle itself with House Stewards, Alex Turrell and Emma Marshall. This was followed by two workshop groups on volunteering and business planning given by NT Powis Castle staff.

On 22 May the group visited the privately owned Eastnor Castle, home of James Hervey-Bathurst who gave a fascinating overview of his business minded approach to family estate. From Eastnor the group travelled to the National Trust's Croft Castle where they were briefed by the Operations Manager, Ian Grafton. A Peer Review took place in the evening.

The third day was spent in Hay-on-Wye. First, discussing and then visiting the Castle restoration works site with Managing Director of the Hay Castle Trust, Nancy Lavin. The group was joined at lunch by Justin Albert, Director for Wales at the National Trust, and also a member of the Welsh Government Tourism Advisory Board and Vice President of the Hay Festival, amongst other senior appointments – and Dr Ben Cowell, Director General of Historic Houses and Deputy Chair of the Heritage Alliance. A Thematic Seminar on business diversification was held in the afternoon. Ben gave an informative lecture which was followed with presentations by the partners on their Learning Cases and a discussion chaired by Justin. After a visit to the Hay Festival, the Study Visit concluded with a final Peer Review discussion that evening at the hotel.

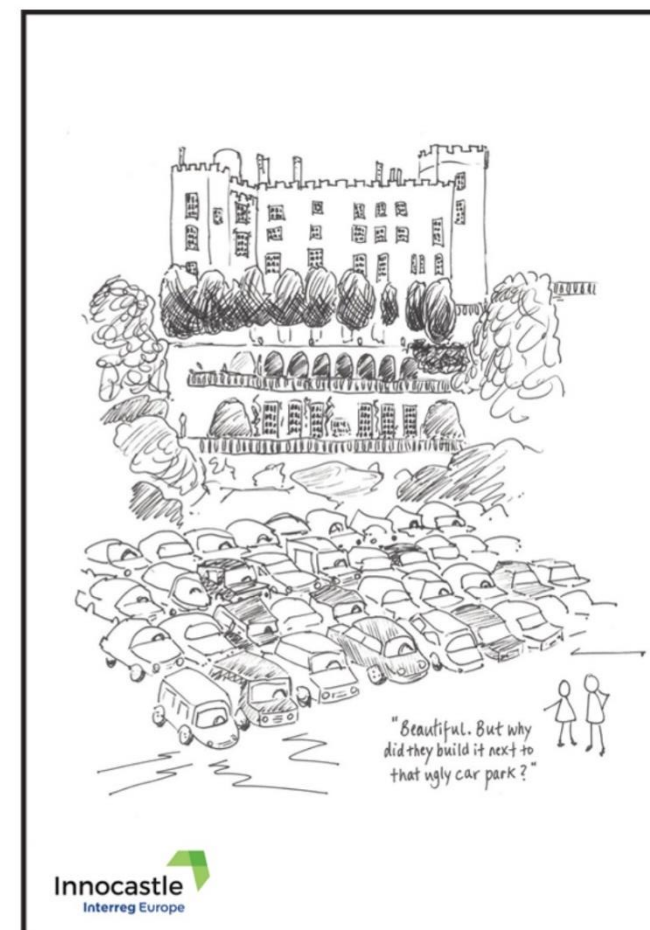
The partners in the Innocastle Project are:

- National Institute of Heritage in Romania (lead partner)
- University College Ghent
- County of Badajoz
- Province of Gelderland
- National Trust (knowledge partner)

The project is developed and managed by Eurodite.

Glossary

Action Plans	All partners will develop Action Plans to improve an identified policy instruments with input collected from the baseline survey, the study visits, the peer reviews and three stakeholder meetings.
Cadw	The Welsh Government's historic environment service.
HCME	Historic Castles, Manors and Estates
INTO	International National Trusts Organisation
Learning Cases	Best practice examples captured from the Study Visits.
NIH	National Institute of Heritage in Romania
NT	National Trust
Peer Review	At the end of each study visit, delegates participate in a peer review of the policy instrument. (As the National Trust is not preparing an Action Plan, the peer reviews focussed on identifying best practices and providing valuable input for the development of the action plans for all regions.)
PTE	Preservation, transformation and exploitation
Stakeholders	Each partner invites a selection of relevant Stakeholders to join each study visit to the partner countries.
Study Visit	Organisational learning is focussed on a series of Study Visits to each partner country, which consist of visiting inspirational sites in each country, a thematic seminar based on local needs, a peer review, a participant satisfaction survey and a learning report.
Thematic Seminar	An opportunity to dive in deeper to a particular subject, with other invited experts.
UCG/HOG	University College Ghent



Background

Recognising that the National Trust of England, Wales and Northern Ireland benefits from a substantial infrastructure, the team were keen to share suitably scaled, incremental and/or replicable examples from their portfolio. Following on from the visit to Romania, the themes that were selected were:

Volunteering – the National Trust could not open its doors to visitors without volunteers. They are the backbone of the visitor experience. But not everyone wants to help out in a house all day and there are many different ways to volunteer, from gardening to beach clean-ups; running supporter groups to internships; getting involved in governance to working holidays. Volunteering is much more than free labour however. It is a way to reach more people (growing the supporter base) and increase its relevance (as supporters help shape its work, making it meaningful to them and others). And to connect to the communities the NT serves. But the future ‘supply’ of volunteers will be very different: it will be a more competitive environment with future volunteers having different expectations and capacities to be involved. What can the Innocastle partners learn from the UK experience?

Partnership working – How can we build effective collaborations and partnerships? Owning and managing buildings, land and landscapes is something that sets the National Trust apart from other charities and campaigns, but what are the methods that we find most effective when building support and action across a broader front? How does it influence, lead and have a positive impact beyond legal ownership boundaries and traditional spheres of influence? What is the role of partnership in the Trust’s government affairs and advocacy work?

In addition to NT-owned properties, our hosts were keen to show the Innocastle group a private home (where owners are traditionally more entrepreneurial and less rule bound) and a community project (an ambitious but limited scale conservation and regeneration project).

Business development/economic diversification/reaching audiences – How to make heritage sites more sustainable. Powis Castle gains income from many different sources: partnership agreements with third parties, residential and farm lettings, holiday accommodation, commercial income from visitors and endowment income. What wider relevance is there in these pathways to financial sustainability amongst the Innocastle partners? But economic diversification is not all about the money. What responsibilities do we all have for addressing contemporary issues through the lens of the past? How do we ensure our places reflect and serve the communities around them? And how can creative programming enable us to reach new audiences?

Within the Wales Study Visit Information Pack provided to partners were Briefing Notes on key UK institutions including: Historic England, Cadw, Heritage Alliance, Historic Houses, Heritage Lottery Fund, and the Architectural Heritage Fund.

Partner Meeting

The Partner Meeting gave the team an opportunity to meet the stakeholders more formally, after unofficial introductions the previous evening. They included Jose Javier Cano Ramos, the Director of Heritage Conservation in Extremadura. As the link for the regional government with UNESCO, he was particularly interested in management models. Jeanine Perryck is from the Gelderland Trust which owns 36 castles of which 7 are open to the public. Her particular responsibility is for collections and people who work in castles. Marjolein Sanderman, a civil servant within the municipality of Rheden, which is part of Gelders Arcadië in the Netherlands whose interest was finding different and smart ways of co-operating between different owners, as well as tourism. Serge Defresne, Heritage Policy Officer at Flanders Heritage Agency, and Els Derycke of the Flemish organisation, Herita, which combines heritage site management with running Open Monuments Day in Flanders and operating a sector-wide network of heritage professionals.

Bert de Roo from University College Ghent updated the partners on the Baseline Study. He briefly introduced the quantitative data from Eurostat which showed how the density of urban development was a pressure in Gelderland and Flanders, whilst Romania and Spain were suffering from rural depopulation. He noted that heritage was not considered as a driving force for tourism in any of the respective regions; statistics at regional level are lacking. The fact that the policy instruments were all quite different was also highlighted. And funding for restoration and/or maintenance projects also varied – in both amounts of funding available and the types of project which might attract support (importance of listing, ownership, feasibility studies, quality of management, etc).

Whilst the instruments are very different, there are also similarities. The majority of funding goes on restoration or maintenance and it is equally distributed (thematic, regional and programmatic). There is consensus on the importance of inventories (whilst acknowledging their limitations); on focusing on HCME more widely than just protected heritage; the threat of fragmentation (from urban pressures to the legacies of communism); and the potential for HCME clusters. Challenges include the need for more statistics and data, and knowledge gaps (in the size, owner structure, maintenance levels, heritage values, relationships between sites, etc).

After the Baseline Survey discussion, partners then introduced the issues they are seeking to address in their Action Plans. Following each presentation, the other partners and stakeholders gave feedback and provided examples of how they deal with similar issues in their region.



- **Gelderland:** Elyze Storms-Smeets presented the country and landed estates of Gelderland, focusing on a spatial approach which views HCME as firstly a castle or country house, then in its ensemble (with surrounding buildings), thirdly the wider cultural landscape and finally the regional view. She said that key areas of interest for Gelderland were climate adaptation, spatial fragmentation and heritage tourism, noting that they would be marking the anniversary of World War II next year as well as launching a Pokémon GO-style app.

"We wouldn't have achieved as much as we have done so far if we wouldn't have worked together as municipalities.(...) we are very happy with the support of the Province." – Marjolein Sanderman, Municipality of Rheden

- **Flanders:** Bert de Roo spoke about the situation in Flanders where the challenge is to connect private HCMEs to regional development plans and to ensure cross-sectoral governance. He said over 75% of HCME were currently inaccessible to the public. He also noted that the region has a lot of instruments already and posed the question whether more were needed or whether it was a case of adapting the current ones and/or changing how they are used.
- **Badajoz:** Three case studies from Badajoz, all at different stages of development, were presented by Patricia Mora McGinty. Firstly, the state-owned Zafra Parador run as a hotel where the region is working with local people to improve knowledge of – and decisions taken about – heritage. Secondly Medellin Castle which has potential to be a focal point for heritage visitors and where the region is seeking to increase civic participation. And finally, the privately-owned 18th century Casa Grande del Bercial which is currently open for Romerías (pilgrimage days) and special occasions. The key in Spain seems to be building public awareness, interest and engagement.
- **Romania:** Lucia Leca spoke on behalf of the Romanian delegation about their three important themes: quality in restoration; operational planning (including marketing, management, maintenance and interpretation plans) and the involvement of stakeholders. She noted that Chiojdu (House of the Coat of Arms) was an example of good quality restoration but that there were problems with financial sustainability. The Palace at Potlogi was an important landmark but during the restoration process some buildings were incorrectly reconstructed. She highlighted the need for good research, to avoid the temptation to select the cheapest quote for a project, and the importance of involving the local community. Lucia also said that under the current system, sites which receive ROP (Regional Operational Programme) funding are not allowed to run a business there for five years, which is having a detrimental effect on financial sustainability as people focus on the restoration work but without a proper plan of how to use and interpret the site in the future.

The Partner Meeting concluded with a short discussion about the survey findings and next steps led by Joep de Roo of Eurodite.

Powis Workshops on Volunteering and Business Management

In order to deepen understanding of the central themes of the Study Visit, delegates were split into two smaller working groups.

Volunteering: Alison Dunne, Volunteering & Community Involvement Officer introduced the Powis approach to volunteering. She noted that the National Trust was established by three volunteers and until 1937 only had 12 paid staff! The Trust now has over 11,000 paid staff but this figure is dwarfed by the 62,000 volunteers making an annual financial contribution of £44,281,680. Alison explained how societal changes were having an impact on people's ability and willingness to volunteer and that a more flexible offer was now needed. She said that volunteers were encouraged to get involved in every part of the Trust's work, even one-day 'visiteering', which the Innocastle team was really interested in. Each volunteer role has different skills and time commitments and working in the Powis Garden is particularly popular. Powis has an online rota system where people can sign up for volunteering slots. She said that most volunteers were retired and that Powis could not open its doors without them. But they are getting older and less mobile so they are taking new approaches such as a work experience programme with local schools or the Mencap (mental health charity) project developing opportunities for adults with learning difficulties. Recruitment is generally at property level and sometimes through events such as Volunteer Open Days. Each volunteer has a manager (so the Head Gardener manages all the garden volunteers, for example). They will have a team briefing every morning before the Castle opens along with a wider Start of Season meeting, and often attend team meetings alongside members of staff. They can participate in social events and trips, and are given travel expenses as a way of acknowledging their contribution and encouraging an ongoing relationship.

Jeanine Perryck commented that in Gelderland, volunteers have to work more than 100 hours to be considered a volunteer and are given a special volunteer uniform. (At the National Trust it is 50 hours.)

Business Planning: Emma Thompson, General Manager, presented the Powis Property Business Plan at the second workshop. Each National Trust property is run as a separate business unit. The turnover at Powis is about £1 million. The Property Business Plan sets out how much the property costs to run and income sources to meet those expenses (such as admissions, catering, retail, commercial activities, events, holiday cottages, let estate). Emma noted that finding the perfect balance was a continual challenge in view of fluctuations in visitor numbers and ongoing property maintenance needs.

This year, Powis had already welcomed 160,000 visitors which was 28% up on budget, but only 20% pay at the door, with 80% being members. Emma mentioned the Trust's internal system for crediting a property for members visits and the recruitment of new members. The team had seen the Welsh Girls School presentation in the Castle and Emma said it was getting more enthusiastic reviews than the previous exhibition, which had been about portraits. The group discussed whether controversial exhibitions were a good thing or not and Emma shared that public impressions of the Clive Collection were very different today than they had been in the 1980s.

After a presentation on options for the car park by a Flemish landscape design student having a stage at Powis, there was a long discussion about the car park and six different options for managing the number of cars which now regularly exceed car park capacity, including the elimination of cars altogether, redesigning and relocation. Elyze talked about landscaping parking lots properly and Emma shared that short-term fixes can cost around £1,000 per carpark space! There was a discussion about paying for parking but as only visitors to Powis use the carpark, Emma said that this was not an option. (In cases where people might come to the carpark but not visit the property – like at Holkham Hall in Norfolk where the beach carpark makes a lot of money, charging for carparking is more appropriate. But not at Powis where it is not a gateway to anywhere else and so many visitors are members, who are entitled to free carparking.)

“I was really surprised about the business side of the National Trust. That every site has to be financially stable, it was something I didn’t expect.” – Bert de Roo, University College Ghent

Thematic seminar: “Diversifying Business at Castles, Manor Houses and Estates”

The thematic seminar gave partners and stakeholders the opportunity to discuss different approaches to making castles, manor houses and country estates more economically sustainable.

Justin Albert, National Trust Director for Wales, welcomed the Innocastle delegates to his home town of Hay-on-Wye and underlined the importance of cross-border collaboration. He explained that the National Trust model was quite devolved and that in Wales, he was in charge of 12 properties with 1,000 employees and 6,000 volunteers, which he hoped were figures that might be more on a par with the European partners. Justin spoke about the importance of the Hay Festival to the town which brings 250,000 people to the area every year and puts it on the map.

Ben Cowell, Director General of [Historic Houses](#), opened the seminar with a presentation about his organisation’s work. Historic Houses has 1,650 members who opened the doors of 320 country houses to the public (on a fee paying basis). Historic Houses, which is an umbrella organisation for privately owned historic properties, employs 11 staff. Highlights from Ben’s presentation included:

- [Holkham Hall](#) is making more money from tourism now than farming
- [Highclere Castle](#)’s starring role in Downton Abbey
- [Hever Castle](#) is run by a charitable trust (as are 50 of the 1,650 members)
- Members of Historic Houses get in for free at the 320 sites, which welcome 26 million visitors a year
- Tourism is the country’s fifth biggest industry

- Historic Houses offers joint marketing initiatives and support with tourism; learning from one another; technical conservation advice; representation to government
- [Doddington Hall](#) has teamed up with a bike shop and now offers cycling in the grounds (as well as the possibility to buy bikes)
- [Knepp Castle](#) has re-wilded the entire estate
- A lot of private owners rent their sites as wedding venues
- [Bramham Park](#) spends 14 weeks-a-year hosting festivals
- Latest Historic Houses marketing campaign is called an '[Invitation to View](#)' and is about access to places that are not normally open to the public
- Taxation is the number one issue for private owners
- [Chatsworth](#) and [Blenheim](#) are the only houses making a profit



“I love the slogan, ‘home is where the history is’. I think it’s very important, and perhaps we should take home to try and emphasise that more?” – Jeanine Perryck, Gelderland Trust

Ben also talked briefly about the [Heritage Alliance](#) which brings together over 100 independent heritage organisations, to learn and share and make a clear case to government by coordinating messages. He said there was some collaboration locally around marketing with the National Trust and that the two were not in competition. “It’s not about how to cut up the cake but how to grow the size of cake!” he said.

Justin told the group about [Tredegar House](#), where the Trust has taken a fifty-year lease of the property from Newport Council. The Trust has turned the property around by reaching out to the local community. It is also working in partnership with the Welsh Government over making heritage free and accessible across the country.

An important issue for many partners is the complexity of the planning system. Colleagues from Gelderland, where owners, government and the public have been collaborating for ten years, spoke about the importance of building trust and getting to know officials. The group agreed that whilst heritage outcomes were important, so were economic benefits and wellbeing, and there was a need for robust figures to demonstrate these.

“I tried to think about the role of government in heritage and maintaining heritage, helping owners. What struck me about Hay Castle was that instead of helping the owner, or the initiator of the project, to succeed and to make a project a success, that the authorities seemed to make it more difficult with the rules they imposed.” – Monique De Rooij, Province of Gelderland

Irina Leca presented the Teleki Castle in Gornesti in the Central Region on the banks of the Mureş River. Built in the 15th century it was in the Teleki family from the 17th century until 1949, when it was confiscated by the Communists. It was restituted in 2011 and now hosts about 20 weddings a year, an annual ball, classical music concerts and a music festival. There are 5,000 visitors to the castle every year but there is no entry fee and they rely on donations. There is only one employee (as the rest are family members) and the Count is now 80 years old. A recently started summer school has been very successful in building documentation and exploring ideas with local stakeholders.

“Whenever we talk about heritage and young people, we always wonder how to reach young people [...] What struck me is that in Romania the young people are the solution, because they do not have the burden of the communist time and are not cynical. I found this a new point of view and an encouraging one as well.” – Marjolein Sanderman, Municipality of Rheden

Paul Thissen said that the Province of Gelderland is a good partner in the planning process, offers financial support to owners and has created a network where important issues can be addressed, like climate change, the digital revolution and tourism. They have an obligation to open properties as much as they can to the public and are developing better direction signage with the idea of castles acting as ‘gateways’ to our cultural and natural heritage.

“Hearing about the Dutch approach to treat historic castles, manors and estates as “gateways” to explore the nature in Gelderland was very interesting.”
– Alina Tomescu, Eurodite

Bert de Roo spoke about Gruuthuyse, on the river between Ghent and Bruges, where there are farms, a hunting lodge and stable. He said there had been some investment in the buildings but not the landscape.

The discussion following the presentations highlighted the following:

- Getting the right balance of conservation, community involvement and making money
- The need for a new model bringing together bottom up civil society and top down financial and planning support
- A return to the social and economic purposes of these sites and the role they had in the local community

Under this last theme, delegates also discussed whether we are looking after the heritage of Hard Power? (I.e. buildings and landscapes created off the back of slavery and murder?)

Is there a danger of repeating an exploitative history by turning heritage sites into elitist places rather than making them accessible to all? And how do we reach out to minority communities? We tend to view heritage protection from white, privileged eyes. The National Trust's 'Everyone Welcome' programme is having powerful results in this space as well as beginning to bring more workforce diversity. Alexander Bishop mentioned the Fondo Ambiente Italiano (FAI)'s '[Bridges between Cultures](#)' programme which trains young people to deliver guided tours in their own language. However, it was noted that more multicultural functions have a tendency to cost money rather than generate income. Jeanine Perryck highlighted how visitors seem to come for the experience, rather than to learn.



Key Takeaways from the Site Visits

Key takeaways from the site visits centered on the following nine themes:

1. When a house is looked after and/or lived in by its owner, there is an element of **authenticity**, which is important. It's not just the families that lived in the house but the ones that worked there and lived on the estate too. However, much depends on how you curate, manage and use your heritage. It is important not to lose sight of context nor to disrespect heritage. Authenticity is a key criterion for World Heritage sites.

“Authenticity is quite a specific term when you are working with heritage but it is difficult to define. We visited places which felt more – or less – authentic and I think it's all about how you manage and use heritage – how you respect it and place it in context. We were discussing with our stakeholders whether using authenticity as a guiding principle in your renovation or development is something that could be interpreted in different ways.” – Sylvie Van Damme, University College Ghent

“I love the slogan, ‘home is where the history is’. I think it's very important, and perhaps we should take home to try and emphasise that more.” – Jeanine Perryck, Gelderland Trust

“The difference between a normal business and a heritage house business, is that the house is everything and that they want to keep it. The sole purpose of the business is the house, the house is their life and their life is the house. Things that kind of keep me thinking.” – Bert de Roo, University College Ghent

“The private owner has obligations to his family going back to the 16th century and he has to earn enough money to keep it up. Somehow he has a different view on how to do that. Different to me [as an employee of a heritage Trust] who steps in ten years ago, with lots of training and knowledge, and tries to conserve what's entrusted to them.” – Jeanine Perryck, Gelderland Trust

“I kept trying to see how to do that at home. How can I adapt this to our situation? And it's really very inspiring, especially for me, that nobody complains, that everyone was positive, proactive, looking for their own way to do things, both from the private, from the National Trust, managers, everybody had a very positive and respectful approach to everything.” – Patricia Mora McGinty, Gestiona Global

2. Balancing money, conservation and civic engagement, and how important it is to get the balance right. The concept of **duty of care** is central to this debate. Delegates were impressed by how the National Trust is able to create more opportunities for deeper connection with local people and engaging them in the organisation's work whilst at the same time undertaking high quality conservation work and securing enough funding and investment. The business diversification examples from the private sector were also very interesting, especially the concept of positioning a property and thinking strategically about how to create a viable commercial enterprise.

“The visit to Eastnor Castle was very interesting in the way the castle was run. The owner used a very commercial model, but the atmosphere was still very castle-like. Maybe we heritage-professionals must show a bit more bravery in exploiting (some) castles.” – Monique de Rooij, Province of Gelderland

“The example of Eastnor was quite surprising and rather commercial but showed the reality of how earning money is not always easily reconcilable with heritage.” – Sylvie Van Damme, University College Ghent

“The balance between ‘the duty of care’ and ‘business aspects’. Every country estate, every owner is different. There is not one solution, but we can learn from each other. Business diversification within a historic house and landscape is a continuous challenge.” – Elyze Storms-Smeets, Gelders Genootschap

“We saw a big variety of economic activities possible. However, I am still looking for innovative examples that go further than the ‘traditional’ selling in shops, selling food in restaurants, organising tourism activities, festivals, etc.” – Sylvie Van Damme, University College Ghent

“How can we use parks for the community? We also have a lot of parks but they are not used at all. It would be interesting to explore how to actually make money out of the parks in order to maintain the buildings.” – Irina Leca, Arche Association

“I was a bit worried about the risks being taken at Hay. It’s a huge restoration project and I worry that the business model may not stand up.” – Els Derycke, Herita

3. The Innocastle delegates spent some time considering the **social value of heritage** (see also above), heritage as an instrument to create a more equal society and the role of heritage in cultural identity. June Taboroff also explained that one of the requirements for funding from the UK National Lottery Heritage Fund is wider community benefit. In all their communications, the Heritage Lottery Fund describes its work as “We fund a broad range of projects that connect people and communities to the national, regional and local heritage of the UK. We fund heritage projects. Heritage can be anything from the past that you value and want to pass on to future generations.” (In that order!)

“For governments, heritage care is much more than just making grants and ensuring heritage is looked after – it’s also about benefit to society. [...] That means that the assistance we give has to support the social component as well, not just the heritage or commercial elements.” – Serge Defresne, Flanders Heritage Agency

“How do you resolve that tension between employing a lot of people who really are passionate about old heritage homes and their content, and their historical value, and a public that doesn’t share those value? And instead views heritage more as some kind of recreational backdrop? Sometimes the result can be that the house or castle doesn’t focus on its historic content at all.” – Alexander Lamont-Bishop, International National Trusts Organisation

“I was thinking about creating meaning for heritage, to make heritage more relevant. And this is about new creative ways of bringing different people into historic houses and landscapes. Creating memories through experience is very important. [...] It’s also important to become more open for the community.” – Lucia Leca, National Institute of Heritage in Romania

“[We discussed] heritage as an instrument to think of values, and to understand the value of materials, of stories, of things that happened, to be rooted to a certain place. And for me it’s more those things that are more important, than (most of the time) the heritage or technical aspects of certain things. And sometimes I had the feeling that these things get lost, and we have to remind ourselves why we think heritage is so important, to know the history of places, and feel that we’ve been there a long time and we will have to take care of it, to be able to be there for longer.” – Bert de Roo, University College Ghent

“The presentation of Hay Castle was very inspiring. It showed the power of seizing the moment and creating a good, diverse and determined group of people that drive the transformation process. A lawyer, a financial person and a good manager is all you need. (and luck with finding financers and with subsidy applications).” – Joep de Roo, Eurodite

4. Done well, **programming** – the structuring and layering of all activities that take place at property – **and storytelling** help provide deeper and more engaging experiences.

“The idea of programming at Croft was new for me, and very interesting. Also how opening hours were being extended at all the properties (Powis, Croft and Eastnor).” – Jeanine Perryck, Gelderland Trust

“I found it really refreshing that the focus was on local communities, people living around the monument. Normally you see the same type of tourism products, those that are aimed at people who are new visitors or touring the area. The Trust’s focus on people that live close by is really interesting and requires you to change the programming all the time.” – Alina Tomescu, Eurodite

Delegates were very interested in the storytelling at the different properties, particularly at Powis where the history of the Castle’s transformation into the ‘Welsh Girls School’ during the Second World War is being told through the evacuees’ eyes. Or at Croft where a family ancestor was one of the Monuments Men and there was a simple quiz about works of art that were lost during the War. There was also a beautiful piano that people were invited to play.

“The storytelling was interesting and the ‘atmosphere’ projects, such as the film projected onto a window at Powis. Open-minded, spontaneous and interesting additions. We tend to think in a more classical, historical context, strict way. [...] Also that they are looking at how they can work with nature around the garden, because we are always looking a lot at the building, but not enough at the surrounding nature. And it’s not only the garden, but the whole region that makes a lot more possibilities to make more storytelling.” – Els Derycke, Herita

5. The team had interesting discussions about **relations with local authorities**, which revealed some good learning points, given that the majority of Innocastle partners are government agencies. The key it seems it to have better communication and to build good relationships across the sector to encourage joint working rather than obstacles.

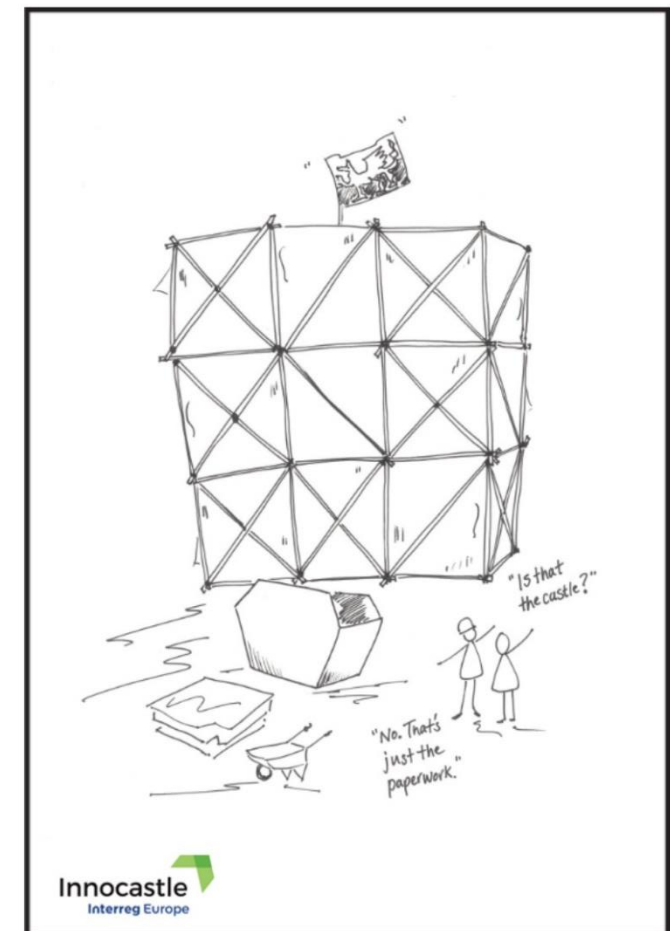
“What struck me about Hay Castle was that instead of helping the owner, or the initiator of the project, to succeed and to make a project a success, that the authorities seemed to make it more difficult with the rules they imposed. It’s important to find the balance between our heritage experts and government in maintaining heritage and what can you ask from the owner? The owner wants to make a living, to keep the house, and our role is to help them and not to make it more difficult.” – Monique De Rooij, Province of Gelderland

“Everyone should be cheering about the fact that some fanatic bought the castle complex [at Hay] and started it all. Because that’s what I think too – everything starts with individuals. If you inherit a castle or you bought it, it’s an individual that takes the initiative. Or there is someone from the National Trust who’s energetic enough to do something like that.” – Jeanine Perryck, Gelderland Trust

“It was interesting to see that there are more possible models to work in partnerships, like private owners working on their own, private owners with National Trust, National Trust on their own, local communities taking responsibilities and working together with local communities.” – Sylvie Van Damme, Univeristy College Ghent

6. The inter-relation between **county states and the wider community**, like at Welshpool, alongside general partnership-working (or lack of it). Also the importance of statistics, such as a cost-benefit analysis of social uses of these places, to convince politicians why they should invest in heritage.

“It’s strange that Powis is such a huge attractive site, and that Welshpool is struggling as a village. That doesn’t make sense. There would be some sort of a way to solve that. There’s a win-win situation



there, I think [...] A good social-cost-benefit analysis for the wider area could come up with some interesting points to improve the economic positions of the Welshpool area. There is much awareness on the economic interest of heritage, but less knowledge on how to diversify the beneficiaries.” – Joep de Roo, Eurodite

“Looking into a better connection with local communities, not only with the direct stakeholders, specifically with the theme ‘heritage tourism’. For instance, finding a role for country houses within the local community, improving and diversifying ways to communicate stories to a wider audience, creating and improving tourist facilities as part of an aesthetic, valuable landscape.” – Elyze Storms-Smeets, Gelders Genootschap

“Hearing about the Dutch approach to treat HCME as “gateways” to explore the nature in Gelderland was very interesting.” – Alina Tomescu, Eurodite

7. Participants were impressed by the way the National Trust organises its **volunteering** programmes and the flexibility in volunteer formats that they saw.

“I enjoyed seeing the volunteer calendar and the way the National Trust gives full flexibility and understanding to their volunteers. Also, visiteering was a very inspiring concept.” – Alina Tomescu, Eurodite

“Good to see that working with volunteers requires strong commitment from an organisation.” – Sylvie Van Damme, University College Ghent

“‘Visiteering’ has the potential to attract visitors and create an experience at estates which are not unique if viewed from the heritage point of view. As such it can be an interesting idea for the majority of HCME’s which are of ‘average’ heritage value.” – Bert de Roo, University College Ghent

“I liked how the local community or the surrounding communities in the area, are involved at all levels, but particularly as visitors and volunteers.” – Florentina Matache, National Insititute of Heritage in Romania

“There is a very personal approach, great connection, and they appear to be one big family, which leads to a very successful visitor experience. e.g. showing gratitude through small details like a postcard. Volunteers are more loyal and show solidarity amongst each other, they will easily add a task they’re not supposed to do to their list.” – Els Derycke, Herita

“One thing that struck me was not only ensuring that visitors come, but that you have to trust them. We saw the property owner welcoming people with dogs into his house. He trusted them and no disasters have happened. Also the National Trust with its system of roving room stewards (i.e. not too many ‘guards’). So you trust the visitors and that’s a good thing. It’s part of the welcoming, and as someone from regional government, I think this is something we could think about.” – Paul Thissen, Province of Gelderland

8. All partners want to **engage young people** and connect with the next generation, which some are doing with more or less success. One of the best practices from the Romanian Study Visit was the idea of an Innocastle summer school. This was raised again in the UK. Another strategy is to welcome families and provide enjoyable activities for young people.

“You need to think about the public you wish to attract” – Serge Defresne, Flanders Heritage Agency

“I was especially thinking about how to engage the youth. The summer school for example [...] So I think that’s one thing I take along to Holland to talk about.” – Paul Thissen, Province of Gelderland

“The summer schools started from a real need for practical experience outside university, which didn’t exist and so we created our own!” – Irina Leca, Arche Association

“Whenever we talk about heritage and young people, we always wonder how to reach young people [...] What struck me is that in Romania the young people are the solution, because they do not have the burden of the communist time and are not cynical. I found this a new point of view and an encouraging one as well.” – Marjolein Sanderma, Municipality of Rheden

9. **Spatial design** and readying our historic country estates for the onslaught of visitors is something that exercises all the partners and so the intensive discussions about car parks and transport planning as well as other essential facilities resonated. There are also of course cases of under-visited properties and what is needed to maintain them.

“The beauty and excellence of the car parks, tearooms and toilets are part of what people expect when they visit heritage places. I remember we all went ‘oooo!’ in the ladies’ room at Eastnor as we were so impressed by the quality and upkeep of the facilities.” – Elzye Storms-Smeets, Gelders Genootschap

“The challenge of the parking in Powis Castle clearly showed how mobility cannot be treated without taking into account the other sectors. In my opinion, environmental issues were less involved in the study visit, although we had a talk on hunting and the challenges in rural estates.” – Alina Tomescu, Eurodite

Analysis of the situation in England and Wales

As the National Trust is not working on an Action Plan or Policy Instrument, there follows some additional comments and observations of the situation in the UK (aside from those mentioned above).

i) A different kind of partnership working

By far the resounding note of surprise from the Innocastle team was around partnership working in England and Wales. While the UK heritage sector demonstrates some good collaboration via official networks, umbrella bodies and advocacy groups, at a local and regional level, there was much less partnership working with local government. It was explained that local authority budgets have been cut so much that there are simply not people to carry out the roles identified by the Innocastle team. Also, that National Trust is so big it has the luxury of being able to ‘go it alone’, although it is doing that less today. Partners remarked on the relative isolation of Powis Castle from the town which seems to be struggling. In contrast the nearby smaller historic town of Montgomery appeared to be well tended and intact.

“The fact that there are associations or groups of people that do advocacy and lobby for historic houses, for owners, you need people that help you for this, to work with a government and so on.” – Irina Leca, Arche Association

“I thought it was interesting to see organisations that come together to give a more important voice to people working with heritage (Heritage Alliance, Historic Houses, National Trust, INTO). Also seeing the visitor as an important partner instead of a simple consumer was a nice angle. Overall, I would have hoped for more collaboration between the public sector and the civil/private sector.” – Alina Tomescu, Eurodite

“There seemed to be a lack of cooperation between local government and owners, whether they are National Trust or private. And that seems a missed chance. I think you could do much better if you were to work together. Perhaps on a project whereby the municipality would employ people with for example a disability to work at the property of either the NT or a private owner.” – Marjolein Sanderma, Municipality of Rheden

“I was surprised to learn that the local/ regional government was only slightly involved in new developments at country houses and estates. In the Netherlands we try to involve the government bodies from the start of the process, before there is even a plan. That way, you can also look into ways to connect to local/ communal challenges/ wishes/ opportunities. It doesn’t always work, but mostly it means a better collaboration between owner and government.” – Elzye Storms-Smeets, Gelders Genootschap

ii) **How many historic castle/historic house museums do you need?**

The group discussed adaptive reuse and the need to think creatively about what we do with our heritage buildings, rather than turning them all into country house museums. The Globe at Hay, where we held the Thematic Seminar was a good example of transforming a redundant building (in this case a Methodist Chapel) into an arts centre that would bring genuine benefit to the rural community.

“There are places where you don’t need another historic house, you don’t need another museum or castle [...] Maybe the community could use something else, they could use a school or a nursery.” – Irina Leca, Arche Association

“It was interesting to learn that the public’s interest might disappear if a project takes a long time to complete, like at Hay Castle. I do wonder though about the business plan, as it seems, all their new activities are already at hand in the town. They don’t seem to offer anything new?!” – Elyze Storms-Smeets, Gelders Genootschap



Stakeholder messages (from Participant Questionnaire)

A full report of the data obtained from the participant questionnaires can be found in Appendix 2.

Stakeholder	What have you learned in England and Wales about heritage and local economic development issues that can be applied to the Action Plan for your region?	What ideas do you have for improving the PTE of HCME in England and Wales which they can use in their Action Plan?	What do you understand to be the main objective/s of Innocastle?
Gelderland	<ul style="list-style-type: none"> * A reflection over how helpful or indeed necessary the rules we impose on owners are * Finding a role for country houses within the local community, improving and diversifying ways to communicate stories to a wider audience, creating and improving tourist facilities as part of an aesthetic, valuable landscape 	<ul style="list-style-type: none"> * "Home is where the history is" * Programming * Trusting visitors and volunteers (visitors to bring their dogs and not cause any incidents; volunteers to roam around several rooms to alleviate the need for a steward in each room of a property) 	The main objective of Innocastle is to investigate the possibilities of governmental support to HCME's.
Flanders	<ul style="list-style-type: none"> * How to make each individual site financially sustainable * The social aspect of heritage which is not just about bricks and mortar and/or making money 	<ul style="list-style-type: none"> * Visiteering and the potential for using this idea at sites which have less traditional heritage 'value' * Volunteer management systems 	First an analysis of the current policies needs to be made. Based on those findings new possible policy measures need to be described and actions to be defined. Because of the different current policies in the different regions, the approach and actions will be very different depending

			<p>on the region the organization is in. Some partners are far advanced in the progress and others still have a lot of work in refinement of their policies. This will probably have an impact on the result. An important question to answer is how the project will be able to shape the national policies (instead of a small region) and policies on heritage in general.</p>
Romania	<p>* HCMEs as gateways (from NL)</p> <p>* Storytelling</p>	Focus on local communities in marketing (rather than on tourists)	
Badajoz	A positive and respectful approach towards heritage	Volunteering and methods of community engagement	

Future Actions for Innocastle

“For next visits – it would be nice to pair stakeholders and partners with their peers in the host country. Example – if a stakeholder from a municipality joins a visit, to pair them with a municipality from the host region.”

“I really liked the discussion about cultural diversity in relation to heritage. It would be very interesting to deepen that. How can country houses owners connect to the culturally diverse society of today? By talking about their own past/ history, or by inviting the community to offer their stories?”

“It was hinted that the National Trust sites promote local producers from the surrounding communities through their shops. It would be nice to find out more about this.”

“I would be interested to find out more about for example large-scale area conservation projects in the UK.”

Appendixes

Appendix 1 – Programme

Appendix 2 – Analysis of participant questionnaires

Appendix 3 – Illustrations

Appendix

Appendix 1 – Programme

Date	Visits	Evening Meal	Overnight Stay
Monday 20 st	Partners and Stakeholders arrive Welshpool, Wales Tickets left at Royal Oak Hotel reception/emailed for free entry to Powis Castle and Garden (National Trust), and a refreshment voucher each https://www.nationaltrust.org.uk/attingham-park	19.00 Royal Oak Hotel, Welshpool	Royal Oak Hotel, Welshpool https://www.royaloakwelshpool.co.uk/
Tuesday 21 st	09.00 Walk to Powis through town and park 09.30 Tour of Powis by House Manager 10.15 Coffee break 10.30/11.30 Break Out groups – Business Planning and Volunteering 12.30 Lunch at Powis 13.30 Stakeholder visit to Attingham Park (National Trust, by coach) https://www.nationaltrust.org.uk/attingham-park 13.30 Partner meeting 17:00 End of Powis discussion	19.00 Dragon Hotel, Montgomery (coach to leave Royal Oak at 18.30, and return at 21.30) http://www.dragonhotel.com/	Royal Oak Hotel, Welshpool
Wednesday 22 nd	08.00 Coach to Eastnor Castle 10.30 Arrival and introductory talk at Eastnor Castle https://eastnorcastle.com/ 11.00 Tour of Eastnor Castle – House, Gardens and Park 12:45 Lunch at Eastnor Castle 13.30 Coach leaves for Croft Castle and Parkland (National Trust) https://www.nationaltrust.org.uk/croft-castle-and-parkland 14.30 Arrival at Croft Castle and self-led exploration	19.00 Chase Hotel, Ross on Wye	Chase Hotel, Ross on Wye http://chasehotel.co.uk/

	15.30 Meet Operations Manager for talk and tea 16.30 Leave Croft Castle for hotel		
Thursday 23 th	09.00 Coach to Hay-on-Wye 10.00 Arrive Hay-on-Wye, The Globe 10.15 Meet Nancy Lavin, Hay Trust, initial discussion about building conservation project and walk to site 12.30 Lunch 13.30 Thematic Seminar, “ Diversifying Business at Castles, Manor Houses and Estates”, completion of learning survey 15.30 Opportunity to look around Hay 17.30 Coach return to hotel	19.00 Chase Hotel, Ross on Wye	Chase Hotel, Ross on Wye
Fri 24 th	09.00 Coach to return to Welshpool, via Hereford to drop at train station for trains to London and Birmingham 12.00 Arrive at Powis - Welshpool (probably safest place to leave cars!)		

Appendix 2 – Analysis of participant questionnaires

Two sets of questionnaires were completed by twenty-one delegates on the Innocastle study visit to Wales and England: a pre-study and a post-visit questionnaire. These were filled out by 3 UK, 4 Spanish, 5 Dutch, 4 Belgian and 3 Romanian Innocastle participants (all the participating partners and stakeholders) as well as 2 from Eurodite. The key findings are summarised below. It should be kept in mind that quantitative scores are subjective and provided by the respondents. Qualitative comments are therefore important indicators for the performance of the project.

12 out of the 21 participants (57 percent) did not have any professional contact with British heritage experts (outside the Innocastle team) prior to the visit so the opportunity to connect and share experiences with colleagues in Wales and England broadened their professional experience.

Pre-Visit Expectations

Many participants said that they were hoping to learn more about sustainable business models for heritage sites and ways of working in partnership with different stakeholders, particularly engaging local communities through public participation and volunteerism. There was interest in how HCME might impact on regional economies, including tourism.

Some participants highlighted learning more about policy development and heritage legislation in the UK and how this might feed into the Action Planning process.

Key Takeaways from the Romania Study Visit

Key takeaways from the site visits centred on the following nine themes:

1. Authenticity

When a house is looked after and/or lived in by its owner, there is an element of authenticity, which is important. It's not just the families that lived in the house but the ones that worked there and lived on the estate too. However, much depends on how you curate, manage and use your heritage. It is important not to lose sight of context nor to disrespect heritage. Authenticity is a key criterion for World Heritage sites.

2. Balancing money, conservation and civic engagement

It is really important to get the balance right. The concept of duty of care is central to this debate. Delegates were impressed by how the National Trust is able to create more opportunities for deeper connection with local people and engaging them in the organisation's work whilst at the same time undertaking

high quality conservation work and securing enough funding and investment. The business diversification examples from the private sector were also very interesting, especially the concept of positioning a property and thinking strategically about how to create a viable commercial enterprise.

One of the big challenges for historic country estates is making them financially sustainable. At Eastnor Castle, Innocastle partners heard many examples of business development and different sources of income. They were particularly struck by the idea that dogs were welcome inside the house! There were also very interesting discussions about the three-way relationship between heritage conservation, making money and community engagement.

However, one participant did say that she'd hoped to see something more innovative (rather than 'traditional' events, retail, catering, etc).

3. Social value of heritage

The Innocastle delegates spent some time considering the social value of heritage (see also above), heritage as an instrument to create a more equal society and the role of heritage in cultural identity. June Taboroff also explained that one of the requirements for funding from the UK National Lottery Heritage Fund is wider community benefit. In all their communications, the Heritage Lottery Fund describes its work as "We fund a broad range of projects that connect people and communities to the national, regional and local heritage of the UK. We fund heritage projects. Heritage can be anything from the past that you value and want to pass on to future generations." (In that order!)

One participant highlighted an interesting discussion about cultural diversity in relation to heritage and "How can country houses owners connect to the cultural diverse society of today? By talking about their own past/ history, or by inviting the community to offer their stories?"

4. Programming and storytelling

Done well, programming – the structuring and layering of all activities that take place at property – and storytelling help provide deeper and more engaging experiences.

Delegates were very interested in the storytelling at the different properties, particularly at Powis where the history of the Castle's transformation into the 'Welsh Girls School' during the Second World War is being told through the evacuees' eyes. Or at Croft where a family ancestor was one of the Monuments Men and there was a simple quiz about works of art that were lost during the War. There was also a beautiful piano that people were invited to play. (One participant also noticed that the National Trust gives a small hint to visitors not to sit on a delicate chair, by leaving something appropriate on the seat, rather than a 'Don't sit here' sign.)

It was also noted that in the UK, people seem more attuned to the idea of visiting HCME as a leisure pursuit.

5. Relations with authorities

The team had interesting discussions about relations with local authorities, which revealed some good learning points, given that the majority of Innocastle partners are government agencies. The key it seems it to have better communication and to build good relationships across the sector to encourage joint working rather than obstacles.

There was some surprise that local and regional government was not more involved in developments at country houses and estates.

6. Community relations and wider partnerships

The inter-relation between county states and the wider community, like at Welshpool, alongside general partnership-working (or lack of it) was of interest to the delegates. Also the importance of statistics, such as a cost-benefit analysis of social uses of these places, to convince politicians why they should invest in heritage.

Participants were inspired by the way the heritage sector collaborates in the UK and that there are close relations between the various different organisations (like the National Trust and Historic Houses).

They were concerned about the “impact of a large organisational stamp” however and that the National Trust ‘look’ very corporate and ‘national’ rather than regionally distinct.

One participant said that he “noticed a bit big difference between countries and regions with big trust-like organisations (Gelderland Trust, National Trust, Paradores ...) and countries where these organisations do not exist or don’t have a large impact.”

7. Volunteering

Societal changes are affecting people’s ability and willingness to volunteer. Historic country estates are therefore developing more flexible volunteering offers. Participants were impressed by the way the National Trust organises its volunteering programmes and the flexibility in volunteer formats that they saw.

They particularly liked the idea of ‘visiteering’ illustrated by the National Trust at Powis and Croft Castles. Visiteering is a way to involve people, as part of a regular visit, in a volunteering activity such as cleaning items from the collection. Finding out more about the work of the house team, seeing behind the scenes and participating in vital conservation work is a good way of building engagement.

8. Young people

All partners want to engage young people and connect with the next generation, which some are doing with more or less success. One of the best practices from the Romanian Study Visit was the idea of an Innocastle summer school. This was raised again in the UK. Another strategy is to welcome families and provide enjoyable activities for young people.

9. Spatial design

Spatial design and readying our historic country estates for the onslaught of visitors is something that exercises all the partners and so the intensive discussions about car parks and transport planning as well as other essential facilities resonated. There are also of course cases of under-visited properties and what is needed to maintain them.

One participant noted that in the UK, gardens are treated as at least as equal value to the castles and other buildings, while in her home country the garden is often forgotten.

Some Learning Results

Learning from the visit was multi-faceted: learning about the UK's heritage policies and the themes of the study visit; the sharing of learning from the other Innocastle countries and the approaches of the different heritage organisations encountered; and more personal learning related to professional matters such as new ideas and building new contacts and networks.

- Average levels of experience and understanding of working in partnership for HCME rose from 2.9 before the study visit to 3.25 (with 4 being highly experienced).
- Similarly, levels of experience and knowledge of working with volunteers at HCMEs rose from an initial 2.4 score to 3.25 after the study visit.
- In terms of experience in business diversification at HCMEs, participants gave themselves an average rating of 2.6 at the beginning of the study visit, which rose to 3.1.
- The question about familiarity with transforming HCME for new uses elicited an average score of 2.6 before the study visit, rising to 3.25 afterwards.
- Knowledge and experience of using HCMEs to stimulate the local economy rose from 2.6 to 3.1.

- The question showing the least change was:

What is your current experience of coordinating HCMEs with other sectors such as transport, education, tourism, environment etc?

Respondents rated themselves 2.45 at the beginning of the study visit and 2.6 afterwards.

- Overall participants registered an increased familiarity with heritage laws and policies in the UK, with the number of respondents answering “yes” to the question:

Are you familiar with heritage laws and policies in the UK?

rising from 40% to 66% over the course of the study visit.

NOTE: The number of participants completing the post-visit questionnaire was lower than the pre-visit survey.

Action Plans

The visit gave further opportunity to think ahead to the formulation of Action Plans. In response to the question, “What did you learn from the UK study visit that will help you as you develop your Action Plan?”, respondents referred to issues regarding:

- A flexible and welcoming approach to volunteering
- Looking into a better connection with local communities, not only with the direct stakeholders, but also through ‘heritage tourism’
- Finding a role for country houses within the local community, improving and diversifying ways to communicate stories to a wider audience, creating and improving tourist facilities as part of an aesthetic, valuable landscape
- The possibilities which arise when heritage is also seen, not as the goal of our efforts, but the instrument to create a more equal society
- The challenge of truly connecting your site to the local area in such a way that everyone benefits
- A reflection over how helpful or indeed necessary the rules we impose on owners are

Appendix 3 – Illustrations



From volunteering to visiteering

Societal changes are affecting people's ability and willingness to volunteer. Historic country estates are therefore developing more flexible volunteering offers. The Innocastle team liked the idea of 'visiteering' illustrated by the National Trust at Croft Castle. Visiteering is a way to involve people, as part of a regular visit, in a volunteering activity such as cleaning items from the collection. Finding out more about the work of the house team, seeing behind the scenes and participating in vital conservation work is a good way of building engagement.



Innocastle is about improving policy instruments for the preservation, transformation and exploitation of heritage castles, manors and estates. The project is financed by Interreg Europe, with a total budget of €1,120,335.00 (85% ERDF, 15% co-financing).

Read the full report of the study visit to Wales at www.interregeurope.eu/innocastle





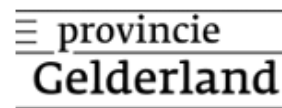
The business of heritage

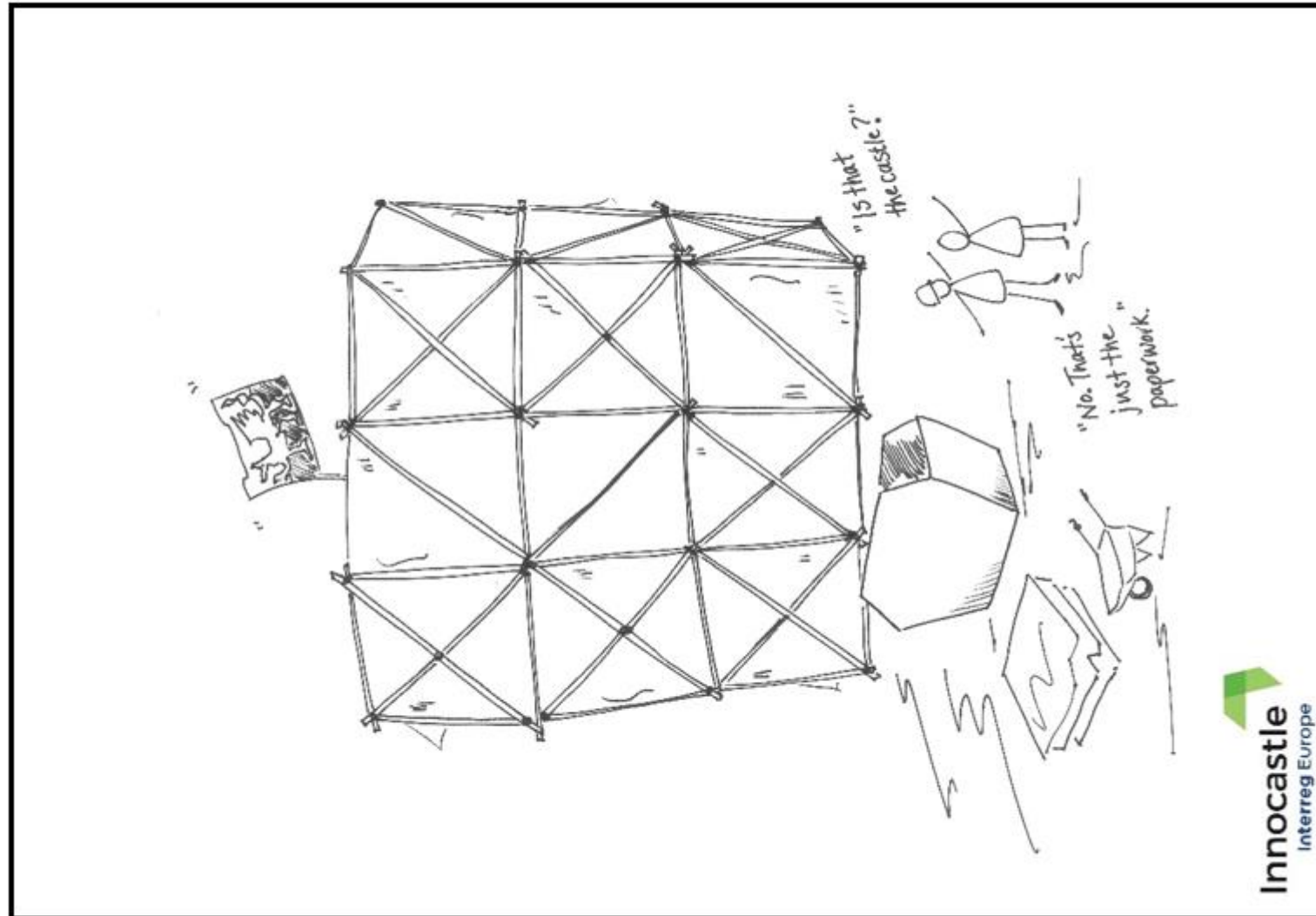
One of the big challenges for historic country estates is making them financially sustainable. At Eastnor Castle, Innocastle partners heard many examples of business development and different sources of income. They were particularly struck by the idea that dogs were welcome inside the house! There were also very interesting discussions about the three-way relationship between heritage conservation, making money and community engagement.



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Working in partnership

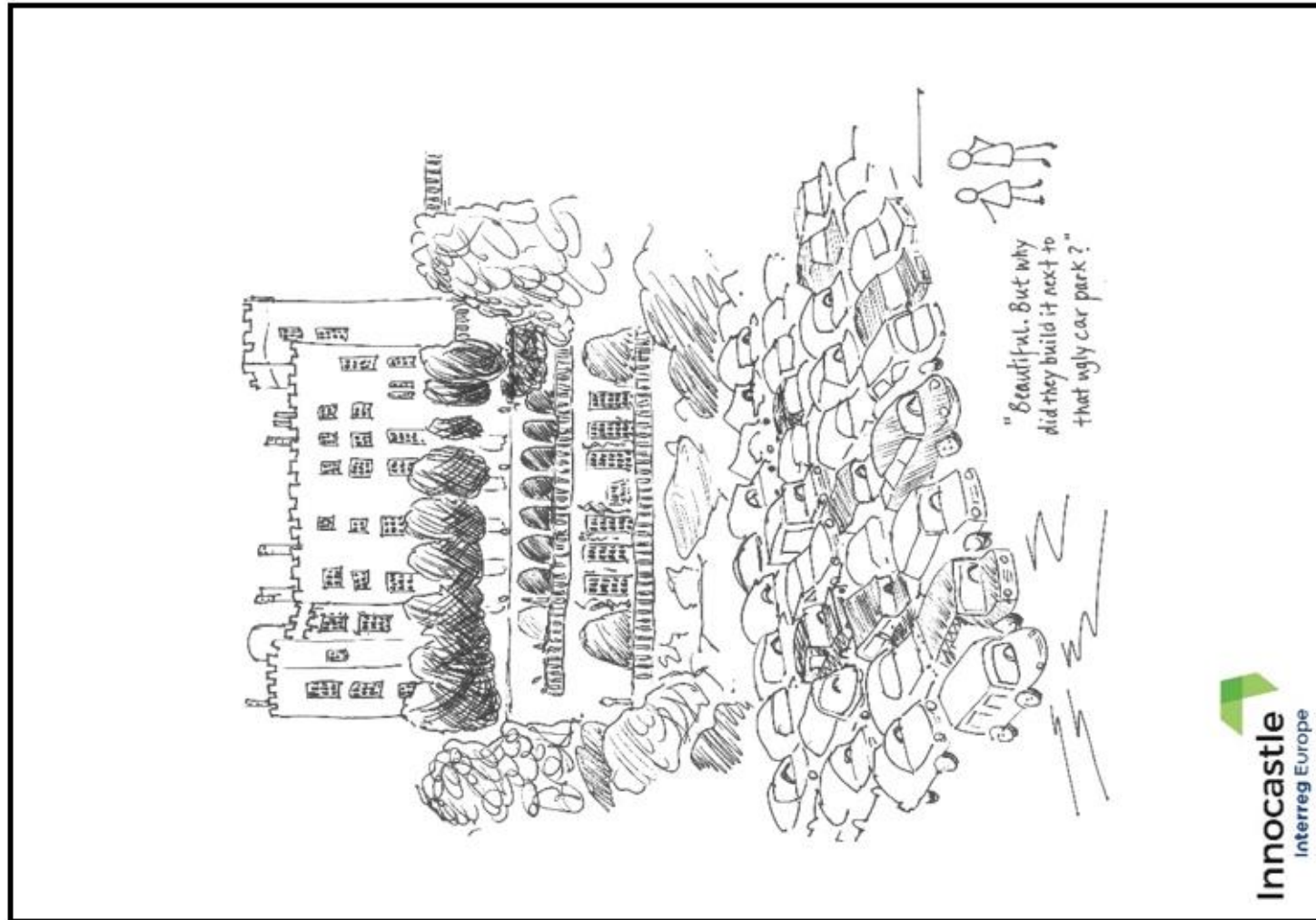
People think about heritage in different ways. Government authorities, heritage experts, owners and communities can all have different reasons for wanting to maintain and develop historic country estates. At Hay Castle, Innocastle partners heard that official procedures can sometimes hamper a project's progress. They agreed that working in partnership was essential but that sometimes stakeholders would need to compromise or take a more pragmatic approach.



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Heritage is not stuck in the past

The Innocastle partners are all interested in spatial design and readying historic country estates for an influx of visitors. The visit to Powis Castle included discussions about car parking and transport planning. Sometimes the establishment of retail, catering or other facilities can be contentious and there can be a mismatch between historic authenticity and providing for a comfortable 21st century visit.



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