

Sites Strategy Workshop #2 Report

**Thursday 15 February 2024
Burrell Theatre, Truro School**

In attendance:

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A full breakdown of the perspectives and information collected during the workshop is outlined in the following sections.

Overall, based on feedback from both workshops, these are the common themes and recommendations to inform the development of a sites acquisition strategy.

1

There is significant benefit to CHT in adopting a more proactive approach to site acquisition, balancing a gap analysis with the organisation's limits and the potential opportunities and risks to its reputation.

2

This approach should be rooted in a clear strategy, informed by CHT's core purpose and an acknowledgement of the changing landscape in which it operates.

3

A proactive approach should include increasing CHT's capacity to be responsive, enabling quick and transparent decision making when new opportunities arise.

4

This balancing of proactive and reactive should manifest in a decision making process that involves

a

Clear and simple criteria by which trustees can judge an opportunity by its relevance, potential short and long term impact, and relationship with CHT's wider portfolio

b

Detailed context provided by CHT staff on the factors involved, and the implications of any decision made

c

An iterative wishlist of site types that can provide a baseline against which to assess potential sites

CONTEXT

On 24 January 2024, Cornwall Heritage Trust (CHT) convened a workshop as part of the Ragdres Gwedhynder (Resilience Project) funded by the National Lottery Heritage Fund. The workshop was attended by CHT and its strategic partners to identify the external viewpoint on their proposed growth and to collect ideas and opinions relating to how this might be achieved. The results of that workshop can be read in the first Workshop Report.

As part of this two month process, including this report, a second workshop attended by CHT staff and trustees was held on Thursday 15 February, to reflect on the outcomes of the first workshop and develop clearer guidance for the development of a sites acquisition strategy.



The workshop was composed of three parts:

- 1 Initial Responses**
Reflections on the first Workshop's outputs
- 2 Proactive Factors**
Agreeing priorities
- 3 A Decision Process**
Exploring a more transparent process

This report will detail and summarise the collective responses - including common themes and differing perspectives - from those present in the workshop.

AGENDA

SECTION 1

INITIAL RESPONSES

The group reflected on the risks and opportunities identified in Workshop 1, and discussed in pairs their opinions of which felt the most important. After sharing their respective perspectives, some categories emerged to differentiate the risks and opportunities and how they could be reflected in a strategy.

Impact on CHT's work

Some risks, including those posed by climate change and its impact on heritage loss, pose a fundamental challenge to CHT's core purpose. Some changes, for example the changing focus on Cornish identity, represent both risks and opportunities.

It is crucial that CHT has the capacity to stay aware of these impacts and trends as they develop, in order to respond accordingly to ensure that its mission can be carried out as effectively as possible. Responses to these risks and opportunities can be built into proactive approaches to site acquisitions, using CHT's understanding of what it needs to build its own resilience.

Degree of control

Many of the risks, and some opportunities, lie outside of CHT's direct influence. These issues, such as the devolution agenda, have the potential to profoundly impact the risks and opportunities facing the organisation.

The uncertainty inherent in these factors could benefit from reactive capacity, as it is impossible to accurately predict the most resilient approach until clear risks and opportunities emerge.

Finding a balance

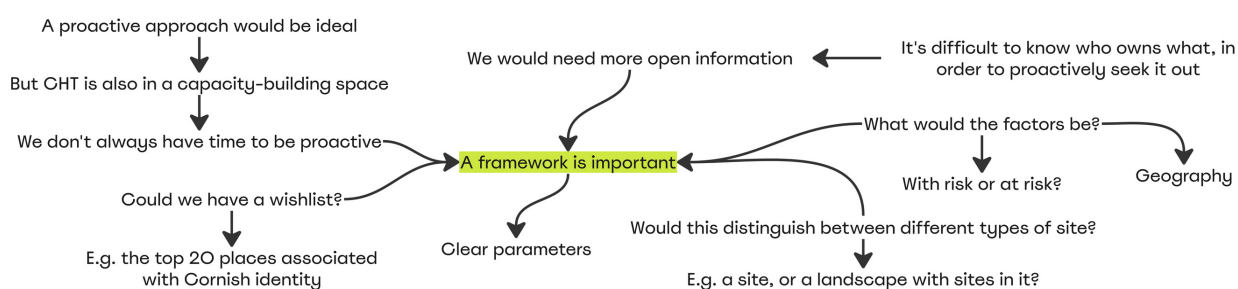
To navigate these diverse factors, CHT needs to be able to balance proactivity and reactivity in its strategic approach. There will always be a need for core capacity, but alongside this there needs to be an acknowledgement that the way to maintain such capacity will shift over time, for example in response to government funding and policy priorities.

Similarly the ability to lead the sector, utilising CHT's unique skills and expertise, and to be responsive to what others are doing in the cultural and heritage landscape, are both important in staying relevant, resourced, and resilient.

Following this discussion, the group were given time to reflect on the recommendation from Workshop 1:

The most effective strategy would be one that tends towards proactivity but still holds the potential to be reactive when required.

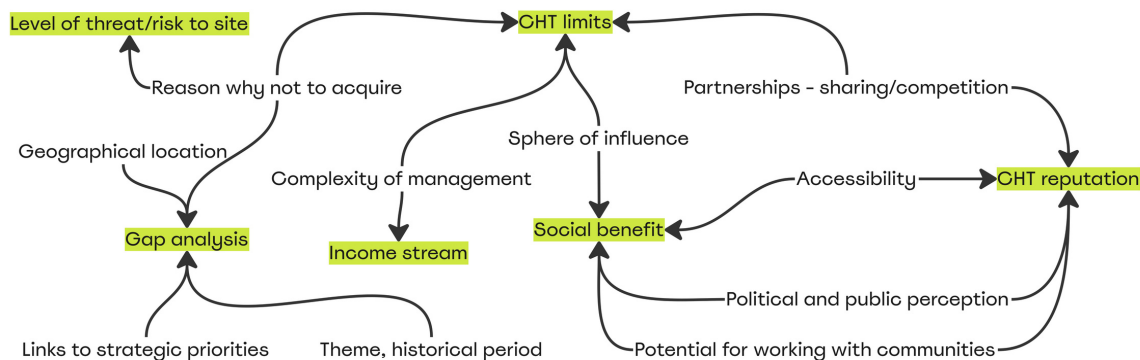
Overall, the group considered the recommendation to be sensible but difficult in practice, requiring more clarity in order to be adopted. The below map summarises the group discussion, centering on the central point that a set of parameters, or framework, will be vital to implementing a strategic approach.



SECTION 2

PROACTIVE FACTORS

Building on the need for a clear framework in order to apply an approach that can balance proactive strategy and reactive capacity, the group then assessed the potential proactive factors identified in Workshop 1:



The main points of the discussion are summarised below:

- Level of risk to site should be the first thing we talk about, and requires the ability to be reactive
- Gap analysis should be the second, and is an opportunity to surface patterns in our approach
- Being proactive is not necessarily about sites only, but also about the organisation's capacity to be proactive in the future
- There needs to be a balance of head (CHT's limits) and heart (CHT's purpose, and the gaps in its portfolio)
- These factors are roughly what CHT already uses, but with different language, and in more of a reactive than proactive context
- Some limits are more flexible than others, e.g. CHT can take on more staff if needed, but if the need arises to buy another tractor, then there are other logistics to consider such as where to store it
- If a site does not fit into the gap analysis, should CHT walk away? Can other trusted custodians be found? This already happens to an extent, in an informal way
- CHT has the potential to be custodians, not always owners, taking on sites on an interim basis if the need and opportunity arises
- The secondary impacts of any decisions are also important to consider, for example what will attract a wider membership base or audience?
- Being proactive enables CHT to be ready, but it also has the potential to be a waste of time and resources in certain circumstances
- The logistical needs arising from site acquisitions needs to be a core part of any decision making process

Two different ways to prioritise the factors involved in a decision emerged, one based on a more reactive approach and the other more proactive:

Reactive

Assess the level of risk to the site and then apply a gap analysis

Proactive

Balance a gap analysis with the impact on CHT's reputation and its organisational limits

SECTION 3

A DECISION PROCESS

In order to put these ideas into practice, the group returned to the idea of a framework for decision making, based on clear and transparent parameters.

The group were first invited to consider this question:

What would a more transparent process feel like, for you?

The overall response was that this approach would be a useful one, allowing a more objective and robust process with less distortion from individual perspectives. However the process would need to be simple and avoid potential over-complexity.

The group discussed what could enable such a process to work:

- A scoring system underpinned by strong analysis
- It would depend on knowing what else was available, to be relative
- It would be helpful to be able to explain the scoring to others, internally and externally
- It could have an impact on CHT's reputation, if the scoring process was made public
- Would it have to be a score, or would a minimum threshold work?
- It could work as a list of criteria, with a number of ticks required
- Having a strategy to work from is important, building up a list around that
- Numbers can be too formulaic, missing key details
- A report written by the staff can contain more details, enabling trustees to make a judgement
- Gut instinct is important
- The scoring could be different for different sites or contexts

The following key factors emerged to be taken forward into a potential strategy:

Rather than a wishlist of sites, it would be useful to have a wishlist of site types

- Informed proactively by a gap analysis
- Enabling a more strategic reactive approach
- This would allow easier public engagement
- Could include a desire to expand, for example
- Wishlist may not be the right word

A scoring system should not be based on numbers alone

- Trustees will still need analysis from staff
- There needs to be space for instinct
- Context is always important - i.e. what's the alternative to this decision?
- Are there red flags to include, that would discount a site?
- There need to be direct links with CHT's strategy

A decision making system would need to have a clear process in order to work

- There could be multiple stages, with a minimum score required for consideration at each level
- Scoring should only be a tool, to inform the decision process not make the decisions themselves
- Agreement is needed on what the scores mean
- Scoring will always be somewhat relative to each person, which needs to be considered
- A traffic light system could be a simpler option