

IAIA 2019

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**Session: Practicing heritage conservation
with impact assessments**

Applying SIA in assessing (community) contribution in cultural heritage

A case study from Orkney Islands, Scotland, UK

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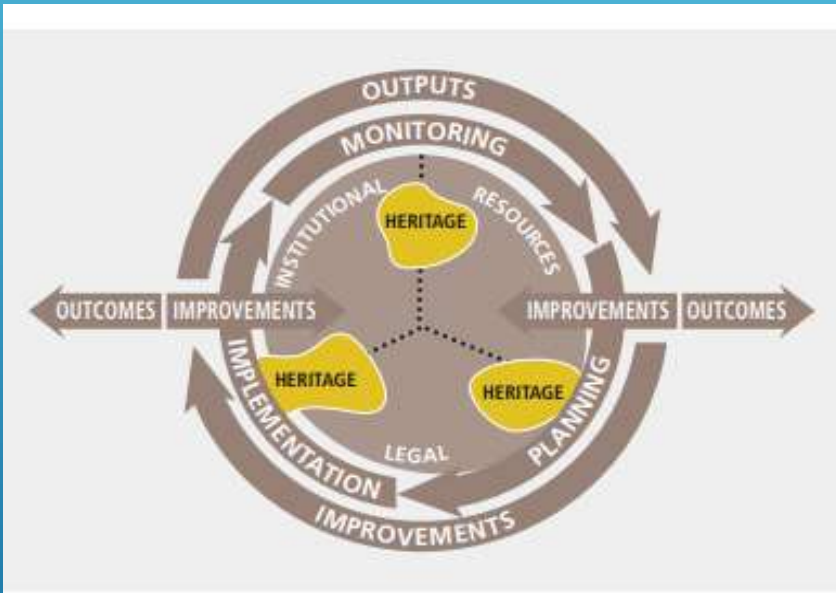
UCL

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- ▶ Social impact assessment (SIA) in ex-post project evaluation for assessing social impacts from community's participation in cultural heritage projects
- ▶ A methodology for :
 - ▶ locating rapidly together rural **community profile, social needs and heritage values**
 - ▶ **Producing contextually relevant definitions of community wellbeing** : bottom up , contextually relevant indicator development for SIA
- ▶ A conceptual framework for exploring wider socio-economic and socio-spatial impacts & consider engagement with tangible and intangible heritage
- ▶ A reflection on use of SIA by heritage practitioners in ex-post evaluation

AIM AND OBJECTIVES

SIA
VS
CHIA HIA



Source Wijesuriya et al, 2013 For UNESCO

- ▶ Purpose : assess perceived and actual impacts produced by the activities increased relevance of projects
 - ▶ Increased institutional responsiveness
 - ▶ Integration of heritage in socially sustainable development and relating SDG's
 - ▶ Increase organizational learning: Non- linear evaluation, includes unintended consequences
- ▶ Focus :
 - ▶ Assessing positive and not negative, perceived and real impacts -difference with HIA!
 - ▶ Dealing with interactions with physical heritage assets and focusing on social and wellbeing impacts (not only intangible –difference with CHIA!
- ▶ Potential and value : tool for increased bottom-up evaluations of projects (internal or external) and development of long term community, stakeholders and institutions relationships
 - ▶ -People centered approach to conservation
 - ▶ Human rights approach to heritage management

VALUE FOR USING SIA PRINCIPLES IN CH
PROJECT EVALUATION



CASE STUDY: ORKNEY ISLANDS-PROJECTS WITHIN SCAPA FLOW HLF SCHEME

ORKNEY ISLANDS, SCOTLAND

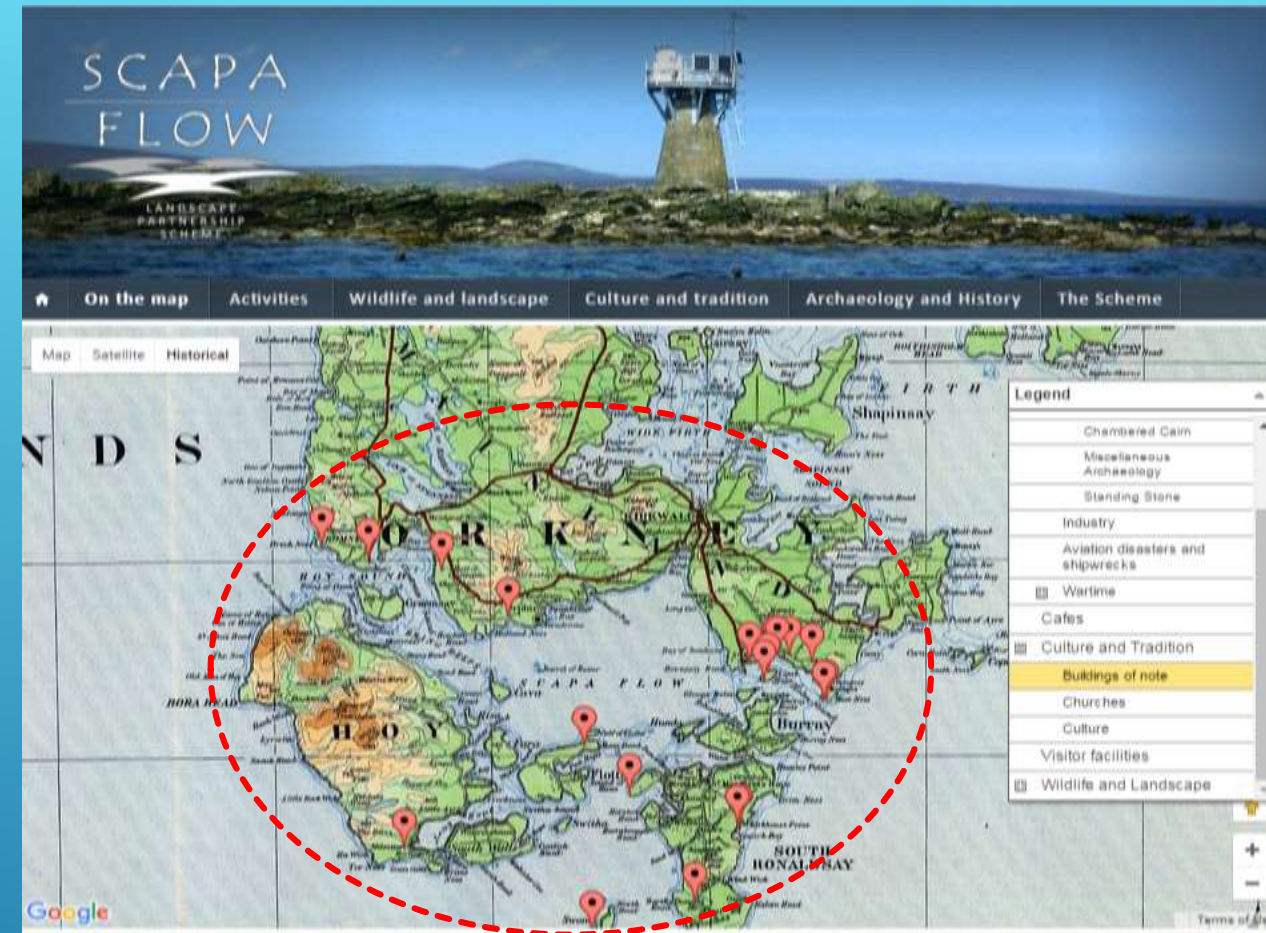


Contextual characteristics

- an archipelago with 20 inhabited islands, research focused on mainland and 3 more adjacent isles
- 21,349 inhabitants (2011 census), density 52 p.s.mile/20/km²
- 200 archaeological sites within a geographical area of 990 km² –high density! Including a cultural OUV WH site

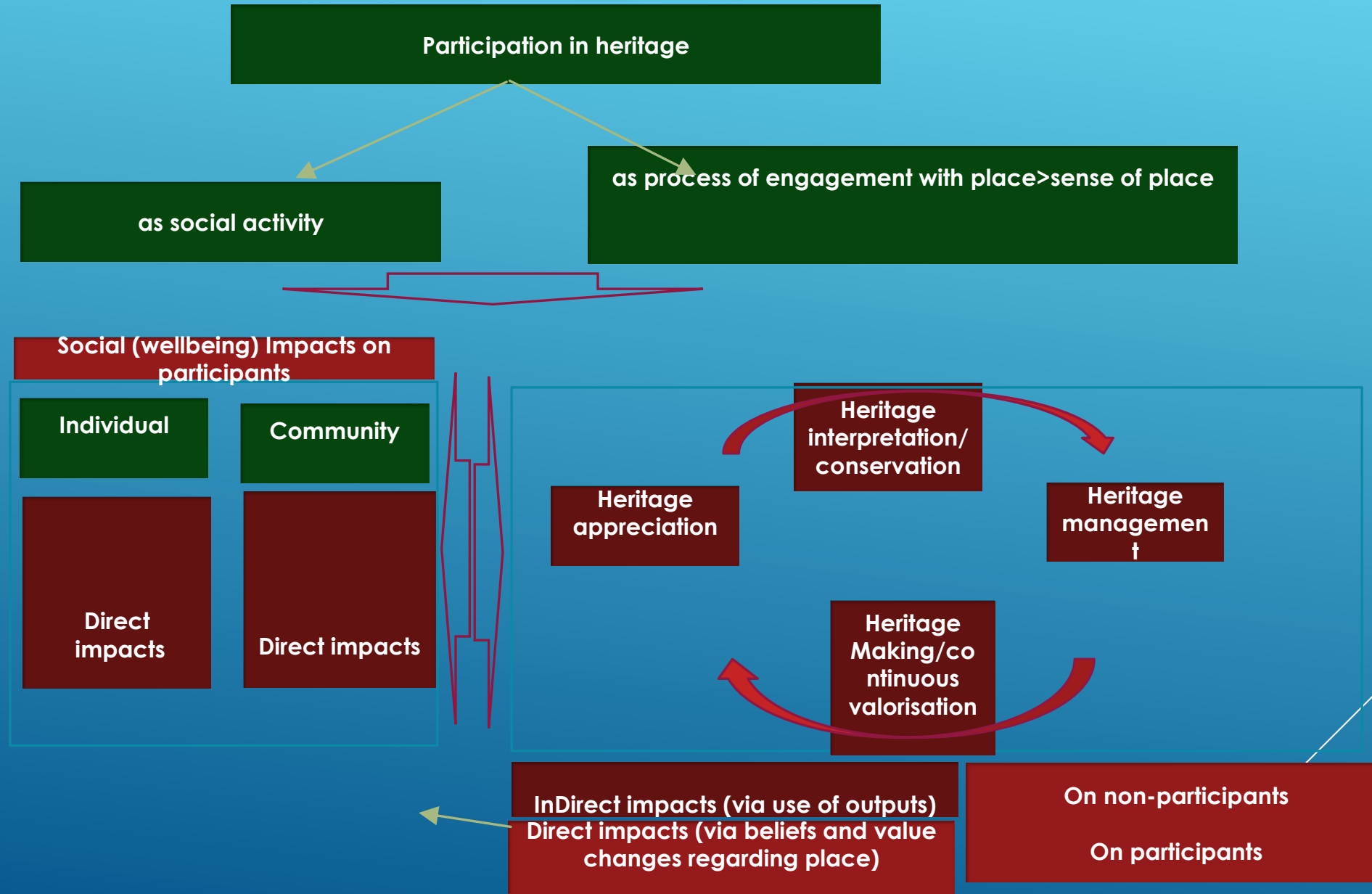


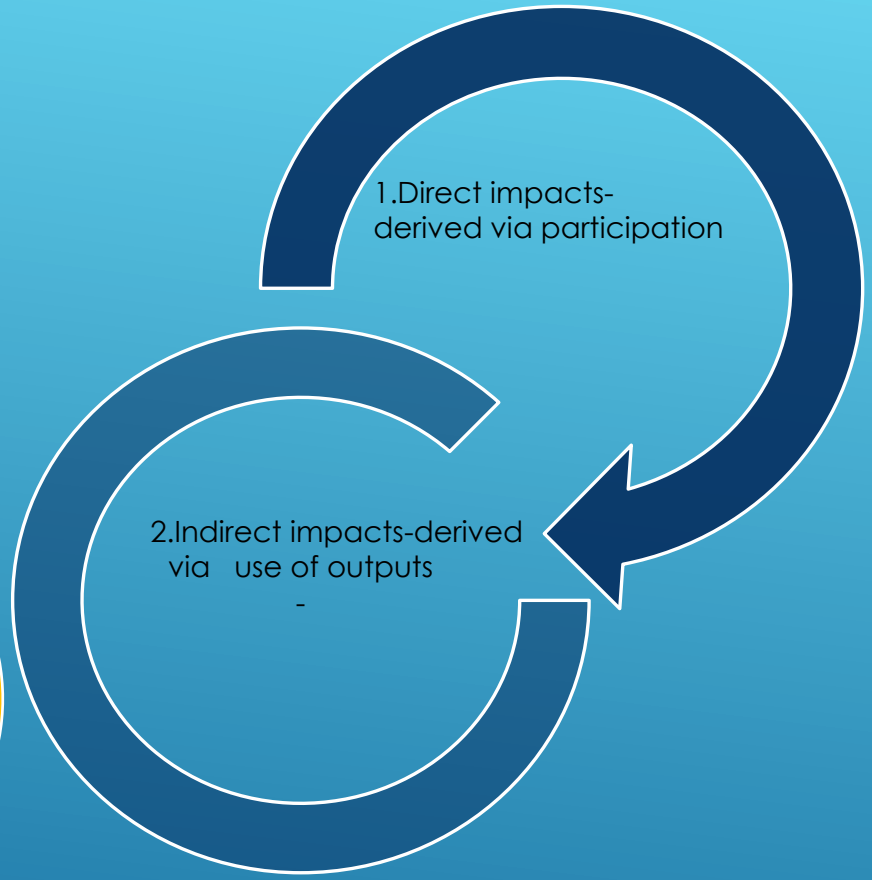
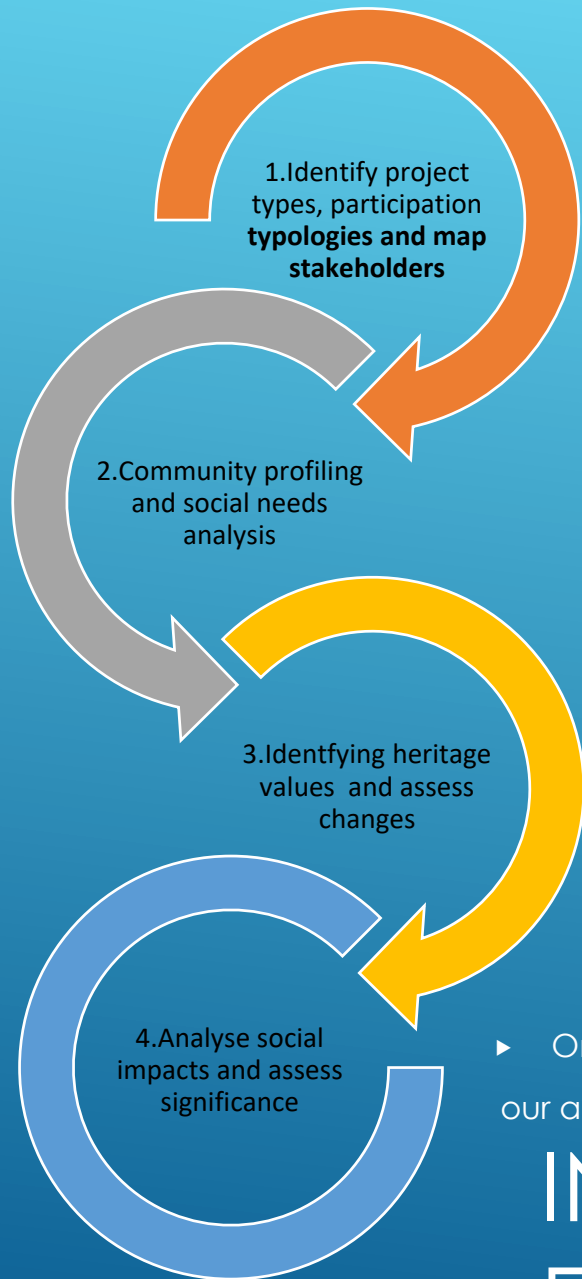
- ▶ Ex post: completion of 42 projects 2009-2012 , 5 years after
- ▶ Multi-project scheme including conservation, interpretation of heritage in landscape
- ▶ Focus : effectiveness and sustainability
- ▶ Challenge:
 - ▶ lack of baseline data
 - ▶ inability to do pre-post tests to locate change
- ▶ Solutions:
 - ▶ integration of social needs analysis - social vulnerability variables
 - ▶ Integration of qualitative approach:
 - estimation of change at individual behaviors
 - understanding context



EVALUATING IMPACTS OF SCAPA FLOW LANDSCAPE PARTNERHSIP

CONCEPTUAL FRAMEWORK FOR DIRECT AND INDIRECT SOCIAL IMPACTS FORM HERITAGE ENGAGEMENT

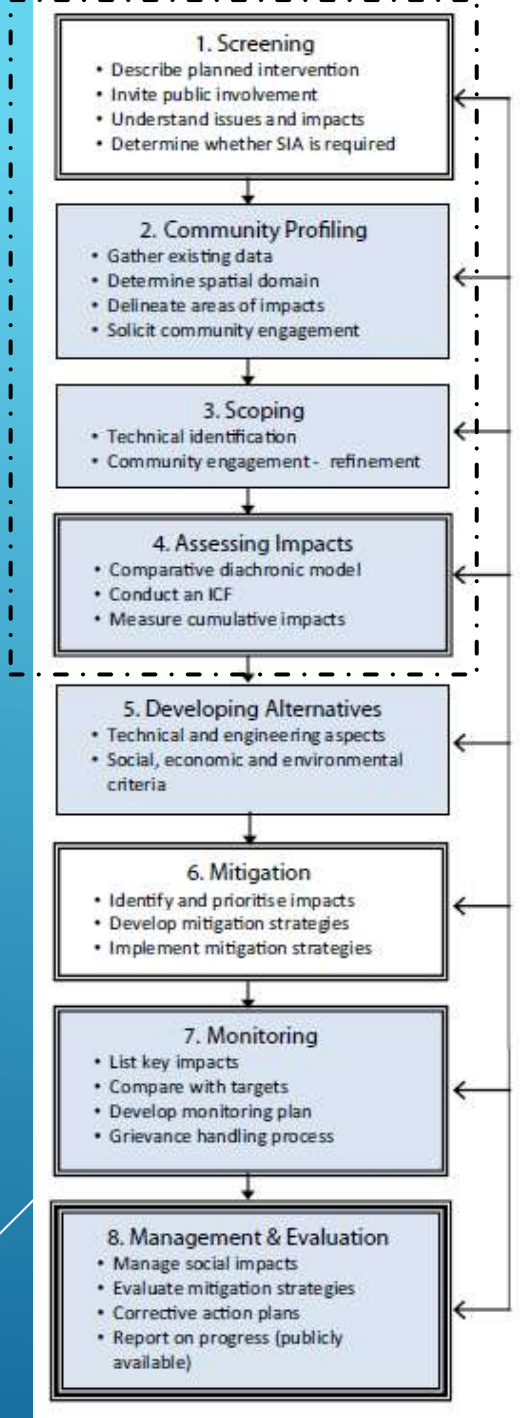




Key data collection method: 42 qualitative interviews with local community members, heritage managers and local planners

► On the right Sia framework by Arce-Gomez et al, 2015, with highlighted steps realized in our approach

INTEGRATED MULTI-PROJECT EVALUATION METHODOLOGY



Project description/Activities undertaken	Participation typology
1. Archaeological excavations and documentation in Hoy and South Ronaldsay (Iron age/Neolithic)	Training and volunteering
2. WWII site Battery Restoration project	Training and volunteering
3. A vernacular “crofter” house restoration and reuse as a museum Rackwick Craa’s Nest	self-initiated community-led restoration project
4. A parish church reuse (Hoy Kirk) into a community center and archive, restoration and archive creation of local history	self-initiated project , community-led project
5. A new interpretation wing for a <i>family-run</i> archaeological visitor centre, Tomb of the Eagles (South Ronaldsay)	Collaborative project: internal managers liaised professionals and volunteers

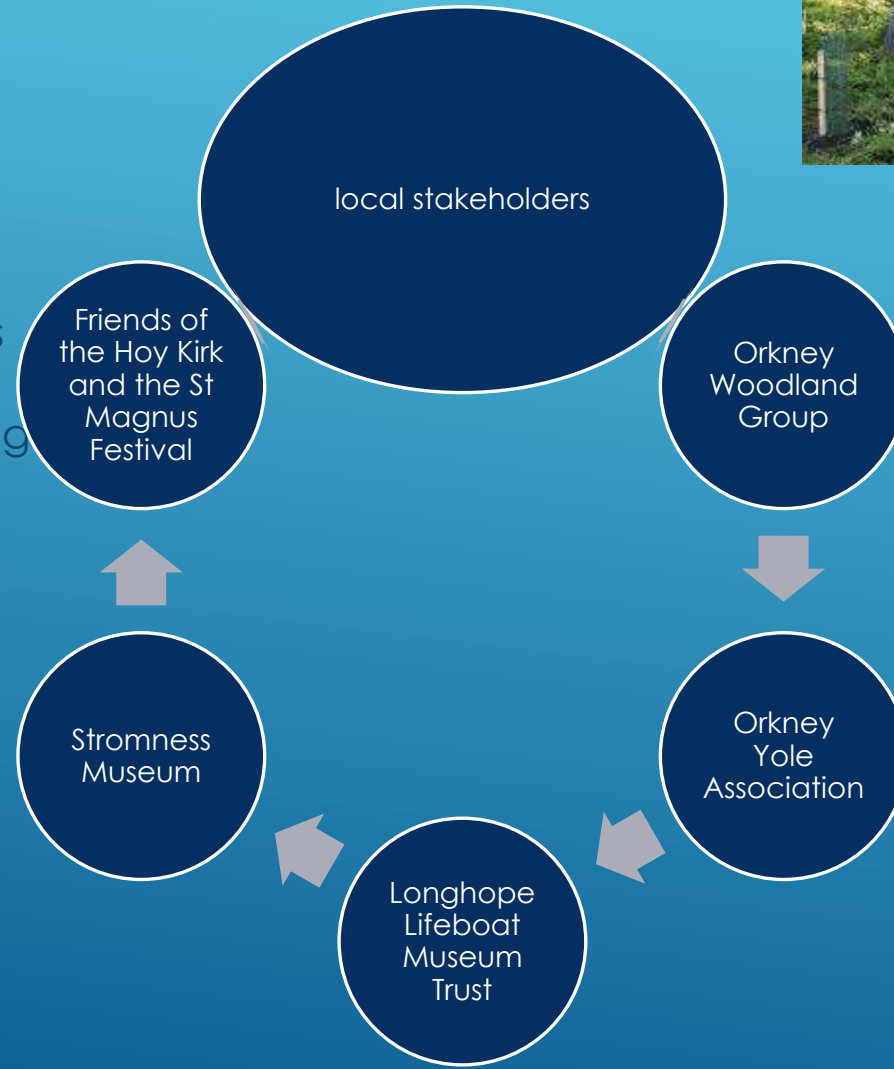


THE PROJECTS: PARTICIPATION TYPOLOGIES AND RELEVANT HERITAGE

MAPPING LOCAL STAKEHOLDERS AND COMMUNITY GROUPS

Official and un official organisations and their roles

- Local Authority, council
- Steering Group (major organisations for natural and cultural heritage protection)
- Advisory Stakeholders (tourism operators etc)
- Local community groups like volunteering associations and heritage trusts



Identify key issues that affect social wellbeing in context;

Corroborate with demographic data

Collect key variables on social needs /issues from interviewees analysis

Map social needs reported and community vulnerabilities in relation to heritage

► 1.Ageing

Orkney is projected to have an ageing population over the next 25 years, with a projected increase of 48% for those aged 65 or over.

2. Deprivation and access to infrastructure

The percentage of people living in 15% most 'access deprived' areas was 62% (2014), which was 311% higher than the Scottish level of 15%.

Statistical Information

Area: 990km²

Electorate: 17,232 (at 1 April 2017)

Population (at last census date – 2011)

Age Group	Population	% Population
Aged under 15	3,316	15
15-64	13,814	64
65+	4,219	19
85+	479	2
Total	21,349	100
Scotland	5,327,000	

By 2037, the population is expected to rise to 22,724.

Equality Census Data

Equality Census Data	Orkney Islands 2011
Population living on the Orkney mainland	17,162
Population living on the isles	4,187
Total male population	10,566
Total female population	10,783
Children (under 16)	3,626
Retirement age and over (65 and over)	4,219
Average (medium) age of the total population	42.6
People with a limiting long-term illness	4,029
Carers (people who provide unpaid care)	1,978
Total population	21,349

- become part of a social group
- benefit skills for daily use
- cooperations with local companies
- find life orientation-goals
- heritage as knowledge and education about historic evolution development
- increase inclusion of newcomers in community roles
- increase mental health
- increase sense of ownership of place and heritage
- increase social capital bonding team work
- intra-generation links
- Job market skills creation
- learn more about heritage-increase excitement
- long lasting outcomes to enhance social impacts
- Make new friends
- new professional networks as an impact
- Personal satisfaction and pride for service offered
- self motivation self direction abilities won
- sense of belonging
- Skills creation-for recreation
- Social groups that benefit
- Socialise-fight isolation
- team work as an impact
- unlock potentials for self-enclosed groups



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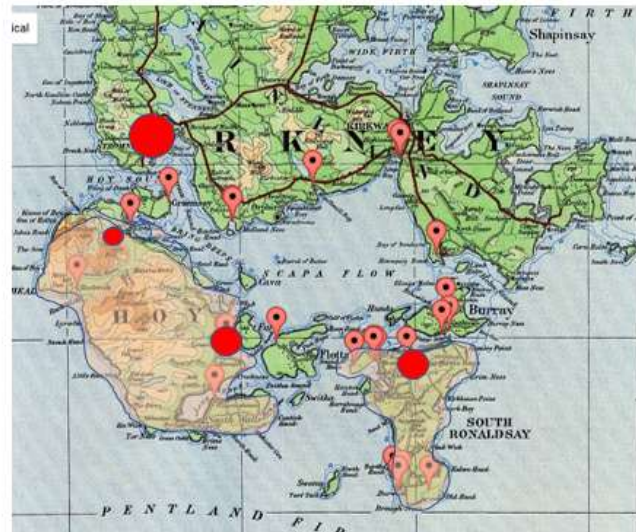
IDENTIFYING COMMUNITY PROFILES & MAPPING SOCIAL NEEDS IN CONTEXT

Map demographics in localities affected: socio-spatial dynamics

Match identifiable social groups with needs in whole context: community profiles

Match participants groups (impact recipients) with direct/indirect impacts reported

Mapping living communities in areas of projects:



- ▶ **retirees** and **incomers** (in-migrants usually form other areas within the UK reaches as high as 50% in certain islands): socialising and recreation, daily support
- ▶ **young people, 18-25y** on decrease : improve their life prospects.
- ▶ children in primary education: learn and familiarize with place and heritage

Direct-main beneficiaries :

- children, young individuals and -especially elderly are the main beneficiaries

Indirect impacts :

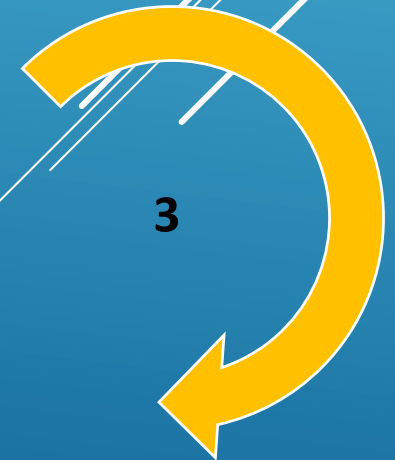
- professionals (craftsmen, artists, builders and tourism operators) /commissioned work
- Landowners and agriculture professionals / training via the scheme /outcomes of the physical restoration

IDENTIFYING COMMUNITY PROFILES AND MAPPING SOCIAL NEEDS IN CONTEXT



Heritage to support economic development
Heritage to support economy based on services and tourism
Heritage to tackle issue of seasonality in interests
Heritage that can sustain place (intersects both with social and economic aspects)
heritage promotion as place branding as a destination
heritage interpretation rediscovered personal history and connection with place that sustains population
heritage protection as natural environment and landscape/wilderness protection
Heritage to support social development and wellbeing
Skills and educational opportunities for development
Recreational opportunities and socialization
Integration opportunities for incomers and isolated individuals

HERITAGE VALUES- ROLE OF HERITAGE FOR SOCIALLY SUSTAINABLE DEVELOPMENT



SOCIAL IMPACT VARIABLES RELATED WITH PARTICIPATION IN HERITAGE (FOR INDIVIDUALS AND COMMUNITIES)

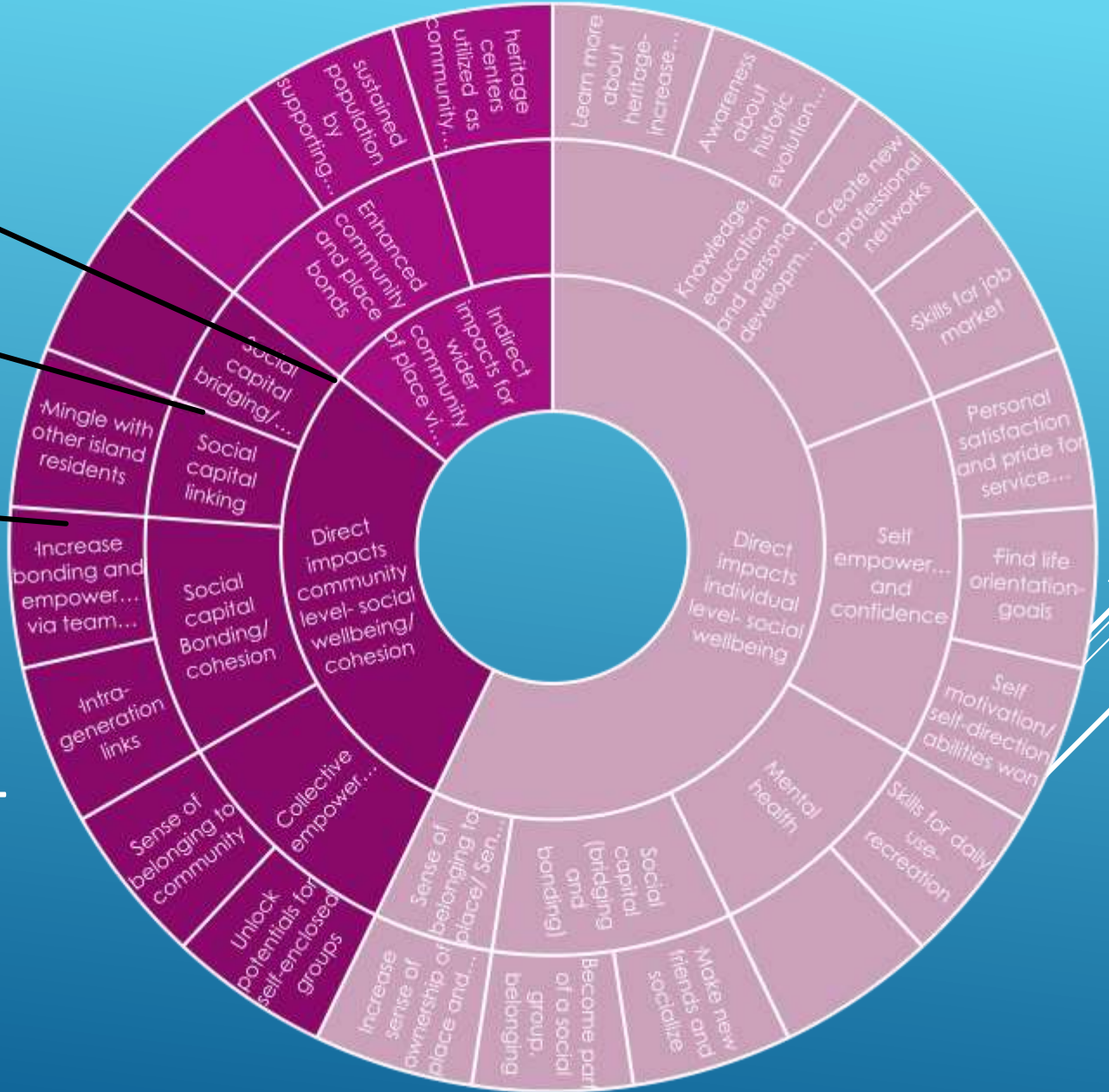


List of impact variables/indicators	Aggregated indicator categories
a. <u>Direct impacts individual level social wellbeing</u>	
• Become part of a social group, belonging	Social capital (bridging and bonding)
• Make new friends and socialize	
• Fight isolation and increase mental health	Mental health
• Skills for daily use-recreation	
• Increase sense of ownership of place and heritage	Sense of belonging to place/ Sense of identity
• Skills for job market	
• Create new professional networks	Knowledge, education and personal development
• Awareness about historic evolution development	
• Learn more about heritage-increase excitement	

■ Direct impacts community level- social wellbeing/ cohesion
 ■ Direct impacts individual level- social wellbeing

■ Indirect impacts for wider community of place via use of outputs

- ▶ **Individual and community level**
- ▶ **Direct** via participation and social exchange processes and **indirect via use** of project outputs
- ▶ **Aggregated impact areas** that relate to theoretical framework (aspects of social capital and sense of place)
- ▶ **Indicators** for locating specific changes



DIRECT AND INDIRECT SOCIAL IMPACT VARIABLES WHEEL



Journal of Cultural Heritage Management and Sustainable Development

Applying social impact assessment (SIA) principles in assessing contribution of cultural heritage to social sustainability in rural landscapes

Eirini Gallou, Kalliopi Fouseki,

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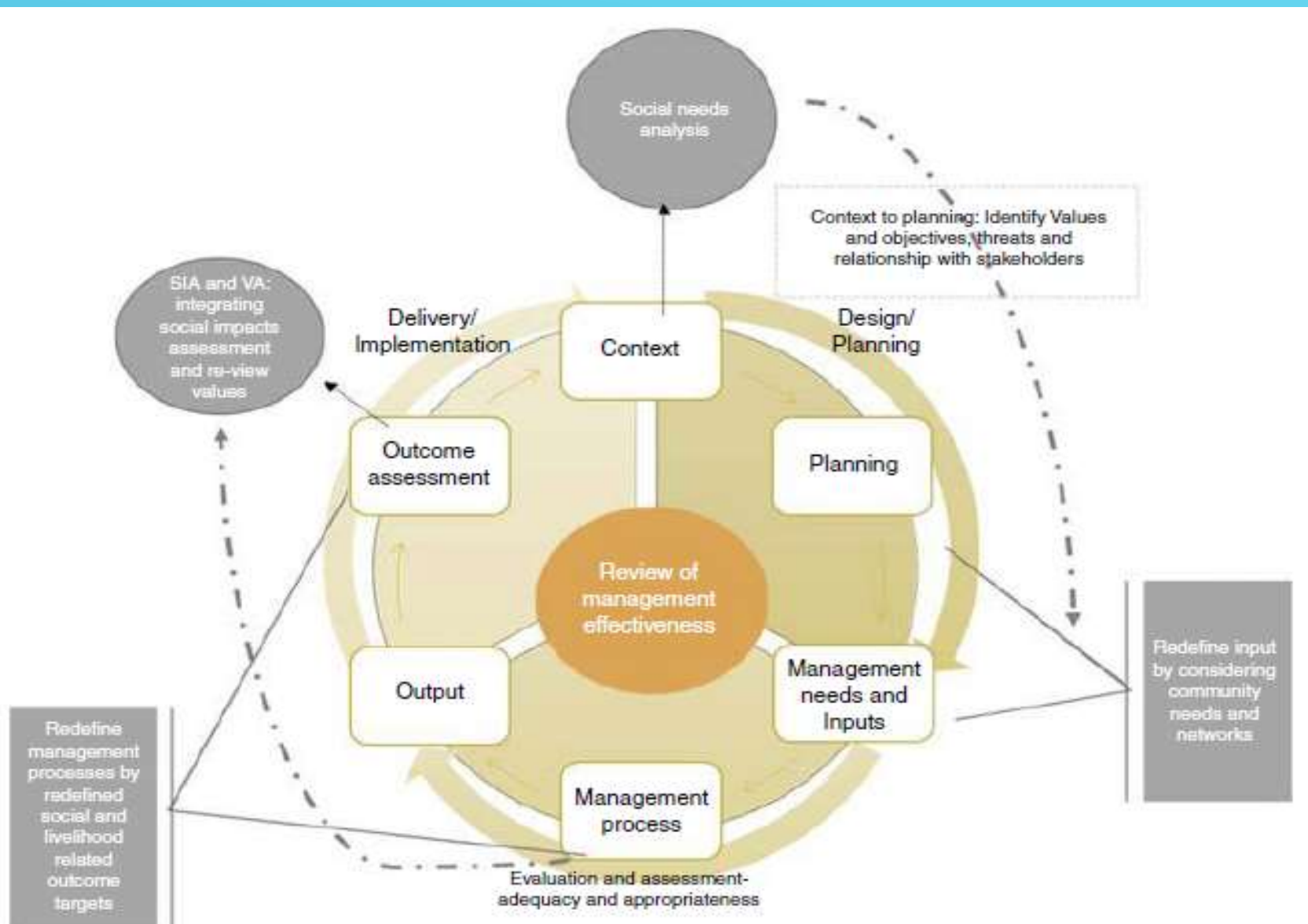
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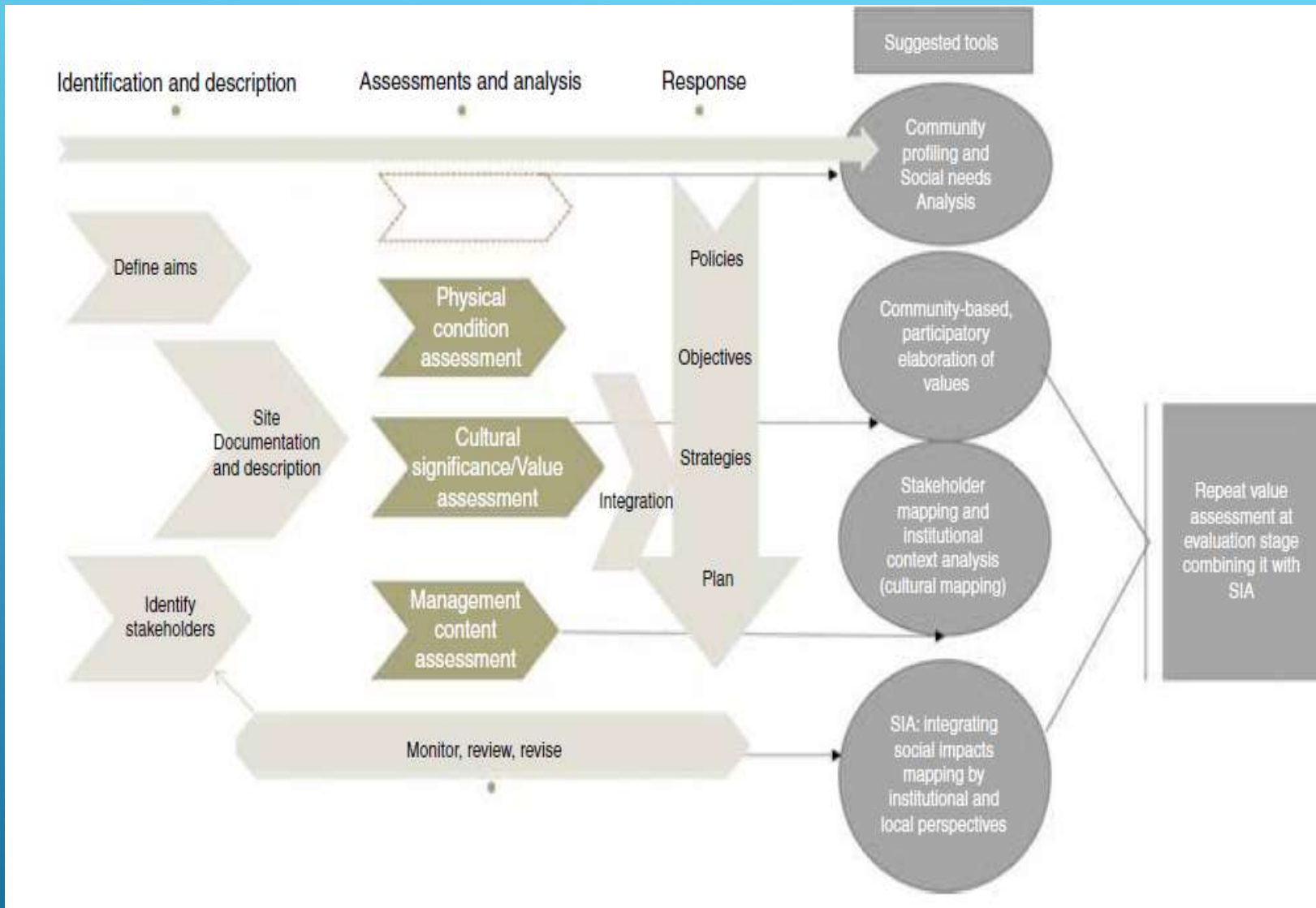
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MORE ABOUT THE METHODOLOGY AND RESEARCH APPROACH



ROLE OF SIA, VA AND SNA IN CIRCULAR PROCESS OF HERITAGE MANAGEMENT



VALUE ASSESSMENT(VA) WITHIN HM : RELATION WITH DEVELOPMENT OF PROJECT OBJECTIVES

Next steps

- ▶ Enhance applicability of method for evaluation of various typologies of heritage projects and socio-demographic contexts : test and validate methodology in other contexts, develop pools of indicators
- ▶ Enhance integration of methodology with Social needs analysis process

Challenges

- ▶ Establish a role for Sia next to EIA, :combine resource based evaluations with social impact ones
- ▶ Develop capacity in practitioners for applying Sia at initial stages of project planning to increase social impact of heritage conservation projects

CHALLENGES FOR ADOPTING SIA IN
CULTURAL HERITAGE MANAGEMENT



THANK YOU!

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