Page

Digital good practice guidance

29/01/2024
29/01/2024
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No matter the type or size of your heritage project, you will probably create some digital outputs. It's important these meet the conditions of our funding: availability, accessibility and openness.

By reading this guidance you'll learn more about our funding requirements and how they vary depending on the size of your grant. These requirements help increase access to the UK's rich heritage and promote the innovative use of digital across the sector.

We have lots more information and advice on how to make the most of digital technology, to make heritage more accessible and enjoyable, and to increase your project's impact and reach. We link to that below. This guidance provides you with the basics.

About digital outputs

By 'digital outputs' we mean **anything created with project funding in a digital format that is designed to give access to heritage or to help people engage with and learn about heritage.**

It includes everything heritage related that is produced in a digital format from environmental and geographic surveys and reports to educational material, visitor resources and digital display content. Your digital outputs might include:

- photographs, sound and video recordings
- electronic documents and databases
- website and app content
- software and code
- 3D models

What we expect

At the Heritage Fund, we're committed to ensuring the greatest possible public, social and economic benefit from the work we fund. Digital skills and technology are a key part of our Heritage 2033 strategy and can support the investment principles that guide our decision making.

We want publicly funded digital heritage resources to be freely and openly accessible to the public, now and in the future. We therefore require people who receive our funding to meet our digital requirements on **availability**, **accessibility** and **openness**. These requirements will help ensure that the digital projects we fund deliver on our investment principles. Projects should outline how they plan to meet these requirements in their grant applications.

If you are planning to create digital resources with your grant you will need to:

- understand what each of our requirements mean

- include plans for meeting them (for example, through collecting relevant permissions) in your project plan
- include proportionate costs (for example, costs relating to hosting, accessibility checking or rights management) in your project budget

Availability

Your digital outputs must be available to the public with unfettered access for between five and 20 years from the project completion date, depending on the level of your funding:

- grants from £10,000 to £250,000 – outputs must be available for five years
- grants over £250,000 – outputs must be available for 20 years

You do not need to keep your resources up to date or host them yourself, but you must have a plan to ensure public access.

Digital accessibility

You need to adhere to recognized accessibility standards so that as many people as possible can access your digital outputs:

- grants from £10,000 and £250,000 – websites must adhere to basic accessibility checks
- grants over £250,000 – websites must meet at least W3C AA accessibility standard

VocalEyes has produced a report and benchmarking tool to help organisations ensure their websites are accessible and inclusive.

For further information on online accessibility, see our digital guide: an introduction to online accessibility.

Openness

Unless there is a recognised exception (which we go into below) your digital outputs should be shared under an **open licence**.

An **open licence** gives upfront permission to access, re-use and share digital outputs as long as the terms of the licence are met. Your digital outputs will include images, research, educational materials, environmental reports, software, web and app content, databases, 3D models, and sound and video recordings.

The licence terms ensure due credit and recognition is given to the organisations and/or individuals responsible for creating the outputs, and to The National Lottery Heritage Fund for supporting the project.

Remote video URL

We've embedded content from YouTube here. As YouTube may collect personal data and track your viewing behaviour, we'll only load the video after you consent to their use of cookies and similar technologies as described in their privacy policy. We will also set a cookie to remember your preference.

Accept Watch on YouTube

Requirements

The Heritage Fund's default open licence is the Creative Commons Attribution 4.0 International licence (CC-BY 4.0). We will also accept an equivalent open licence such as OGL or the CC BY SA 4.0.

Grantees must apply the open licence to the digital outputs they produce and make these resources publicly available for at least five years. Members of the public viewing your digital heritage materials should be easily able to see the CC-BY 4.0 licence badge and an attribution statement.

Metadata, data and code produced by the project should be shared under a Creative Commons 0 1.0 Universal Public Domain Dedication (CC0 1.0) or an open software licence.

Species and habitat records collected during projects we fund must be shared with the National Biodiversity Network (NBN) Atlas and/or the Local Environmental Records Centre (LERC). Further information can be found on the NBN website and in our landscapes, seas and nature good practice guidance.

Works already in the public domain fall outside the scope of this requirement. To make sure these materials are not mistaken for copyrighted materials, we recommend you clearly identify public domain assets by using the CC0 1.0 dedication or equivalent. No new rights should arise from the reproduction of public domain works supported by our funding. Digital reproductions of public domain materials, including photographic images and 3D data, should be shared under the CC0 1.0 dedication.

Orphan works (where the copyright owner is either unknown or cannot be located) cannot be shared under an open licence.

An overview of open licences

There are a number of additional issues to be aware of, including copyright, ethics and GDPR, and we have more detailed information to help you:

- if you've never used open licences before, see our digital guide to working with open licences
- if you're working with volunteers, communities, contractors or partners, see our guide on creating digital resources: GDPR, copyright and using open licences

Recognised exceptions

For some projects alternative arrangements or exceptions to our default licence may be appropriate. These include projects with digital outputs that:

- depict people who are currently under 18 years old
- include special category data, for example, in oral history interviews
- are produced by or depict adults at risk of harm

We encourage all projects to consider ethics in relation to copyright, licensing and cultural heritage management. For example, there may be reasonable objections to sharing the research, data and other media produced around spiritual works, funerary objects and human remains under an open licence.

Projects should raise issues they believe would prevent them openly licensing their digital outputs as early as possible in the application process, or, if currently receiving an award, with their Investment Manager.

Additional resources

We have supported a range of resources to help you deliver available, accessible, and open digital heritage.

The Heritage Fund-supported Digital Heritage Hub has answers to the sector's 100 most pressing and frequently asked digital questions.

Guides on how to use digital creatively, safely and effectively:

- Introduction to online accessibility
- Working with open licences
- Creating digital resources: GDPR, copyright and using open licences
- Online privacy and security
- Getting started with online learning
- Working safely online with children and young people
- Digitisation project planner, handbook and examples
- Doing digitisation on a budget

Digital leadership briefing:

- Artificial intelligence
- Open licences

An introduction to online accessibility

06/08/2020

Man with headphones and computer

06/08/2020

See all updates

This digital guide is designed to help heritage organisations make their online content accessible to all.

Attachment	Size
Digital guide Introduction to online accessibility	266.7 KB
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About this guide

This guide outlines how people with a range of disabilities use online content. It offers advice and resources to help heritage organisations make their digital content accessible to all.

It is produced by online accessibility expert Alistair McNaught for The National Lottery Heritage Fund for our Digital Skills for Heritage initiative, designed to raise digital skills and confidence across the whole UK heritage sector.

Accompanying webinar

To accompany the guide's release, Alistair McNaught took part in a webinar hosted by The National Lottery Heritage Fund on 13 August 2020. The speakers discuss key online accessibility principles.

> "Digital accessibility is often perceived as something really complicated, something really technical...and hard to understand. So I want to start just by taking us right back to basics."

Alistair McNaught

Watch this below:

Speakers:

- Josie Fraser, Head of Digital Policy at The National Lottery Heritage Fund
- Alistair McNaught, McNaught Consulting
- Harriet Hall, Campaigns Project Manager at The National Lottery Heritage Fund

Guide

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Author and contributors

About the author

Alistair McNaught has worked in staff development and digital technology for 20 years and co-authored a range of national training programs and accessibility guides for the education sector.

He contributes regularly to national and international conferences and is a founding member of the Digital Accessibility Working Group, liaising with Government Digital Service on behalf of the public sector and education.

Contributors

Alistair is grateful to the following for support in preparing this guide: Ron Mitchell at Mitchellmedia; Lilian Soon at University of York, Zoe Hanscombe at OpenSight, accessibility engineer James Scholes; Atif Choudhury at Diversity and Ability; Sam Egerton Kemp for help with contacting members of the deaf community; Maggie McKay for help with contacting people with cognitive difficulties.

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Introduction

There are nearly 12 million disabled people in the UK. Since 1995, the right to “reasonable adjustments” has been enshrined in the Disability Discrimination Act and the later Equality Act.

While people are familiar with the need for physical accessibility adjustments such as ramps and lifts, much less attention has been given to digital spaces.

In 2018 the Public Sector Bodies (Websites and Mobile Applications) (No. 2) Accessibility Regulations was adopted into UK law. It defines a “reasonable adjustment” as meeting web accessibility standards.

Now in the final stage of thier phased introduction, the regulations require high accessibility standards on all public sector websites after 23 September 2020.

The legislation may not directly affect your organisation's website, but as people recognise good accessibility, sites with poor accessibility will stand out. They will appear unprofessional and will reduce your organisation's potential audience and support base.

Inclusive digital practice sends the positive message that your organisation values everyone it engages with.

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Guiding principles

This guidance will help you understand what is meant by digital accessibility and why it matters.

In a short guide, it is impossible to cover the range of tools, techniques and approaches relevant to every project's website. Treat it as a travel guide to introduce you to different practices, ideas and even language. It will describe the highlights and give you recommendations – you must do the travelling.

The guide will explore three key principles:

Knowing:

- Who is responsible for the accessibility of your digital content?
- How do people experience your digital content in different ways?
- What does good practice look like?

Doing:

- Each section in this guide has links to further information and action.
- The guide's Role related section helps you identify specific actions depending on your focus and skill level.

Telling:

- The final part of the guide is about telling users what does and doesn't work well on your website. You can describe its accessibility once you have checked it for the key issues covered in the guide.
- An accessibility statement is a Plain English, user-focused guide which lets a disabled user know what they can expect from your website. It is a core document for disabled users.

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Who is responsible for the accessibility of your digital content?

There are many layers to a website, with different people contributing to each layer. Each person needs to make sure their contribution is accessible. If they don't, the user experience can be poor, even if everybody else has done a good job.

Most websites will have a selection of these layers:

- **Site design:** the big picture of the website – how it works.

- **Page design:** the layout of individual pages – how they look and behave.
- **Page content:** What appears on the page – text, images, video, audio and interactive elements.
- **Downloadable files:** Including documents, presentations, spreadsheets etc.
- **Outreach and engagement:** Community-building, including through social media.

What you need to know about digital accessibility depends on the layer you work with – but everyone is responsible, together for the accessibility of digital content.

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People access your content in different ways

Putting inclusive design to work will enable disabled people to use your digital content effectively. It is hard to create a website where all content works for everyone – deaf people and blind people have entirely different needs, for example. Accessibility means no user is excluded rather than perfection for all.

This can be achieved by:

- Understanding the basics of digital accessibility – for example, find out from the Web Accessibility Initiative how people with disabilities use websites.
- Making accessibility part of quality control – it should be equally as important as spelling, grammar or branding.
- Using a variety of media to support people with different requirements.

The next section helps identify good practices that minimise exclusion.

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Good practice in digital accessibility

Good accessibility principles benefit everybody, not just disabled people – but disabled people are disproportionately affected by inaccessible design. Some of the key principles are highlighted below.

Reading text

Text can be selected and read out

If text on a page or a resource can be selected and copied to the clipboard, it can also be read out loud by text-to-speech tools. Images of text cannot be, however. Listening to text helps people with vision difficulties, learning difficulties or neuro diversity. It also helps with multitasking.

Colours and contrasts work for all

Good contrast between foreground and background colours will suit most users working in most lighting conditions.

Avoid conveying information by colour alone – this will support people who cannot distinguish colours. For example, ensure hyperlinks are underlined as well as in a contrasting colour.

Read more information on links, colours and appearance.

Language that works for all

Use simpler words and shorter sentences. Don't let jargon, acronyms or technical terms get in the way of understanding. Take a sample of your text and paste it into a readability calculator to check.

Tables that work for all

Blind users benefit from alternative text or a caption to summarise a table's purpose. Their screen reader software reads from left to right and top to bottom. Use clear headers on simple tables. Don't split or merge cells or leave empty rows/columns – this disorientates blind users.

Only use tables for data or structured information – not for page layout

Magnification without sideways scrolling

If content on a page can be zoomed to 400% and read without having to scroll sideways, it helps people with vision difficulties as well as those reading on a small screen. This is described as "text reflow" or a "responsive web page".

Check your site by clicking CTRL and + in any browser when using Windows or CMD and + for Mac

Navigating through information

Page design allows instant navigation by headings

Utilising inbuilt heading styles (Heading 1, Heading 2 etc) in webpages and documents allows users to navigate content by heading level using:

- Inbuilt tools – Word's Navigation pane or Adobe Reader's Bookmark pane.
- Browser plugins – for example headingsMap on Chrome.
- Assistive technology such as screen readers.

A logical heading structure with no missed levels is key, especially for blind users – it enables them to quickly get to the section they need. Search engine specialists state that headings make your site more discoverable.

Create headings in Word (writing specialist) and headings in web page (usability specialist).

Page design allows instant navigation by hyperlinks

If each hyperlink in a page or document has a unique and descriptive text, a blind user's screen reader can pull up a list of hyperlinks on a page and read them out. The user can then select the one they need. If the link text is "click here" or "more information," the user can't tell which one to use.

WebAIM accessibility specialists promote good practice with links.

Page design allows instant navigation by lists

If lists are created using the inbuilt list tools in a word processor or web editor, a blind person's screen reader software can jump to any list in the document. This is more efficient than listening to every paragraph until

the user finds the list they need.

Don’t create “lookalike lists” using asterisks and tabs/spaces – a screen reader can’t jump to these.

Page design lets users skip content they don’t need

"Skip links” let keyboard-only users – for example blind or physically disabled people – jump over repetitive content, such as menus or social media feeds. This makes your website significantly easier for them to use.

Learn more about skip navigation links from WebAIM.

Media and interactivity

Images that work for all

Describing images is beneficial for people who can’t see them and for people who can see them but struggle to interpret them. An image can be described in the nearby text or in the alternative text field of the image (alt text). When you add an image to a document/webpage, use the option in the properties dialogue box to describe the image.

Images need to be described differently depending on use or purpose. Find out how to describe different types of images from the Web Accessibility Initiative or check examples of different types of alt text from Penn State University.

Multimedia that works for all

Audio with an accompanying transcript is accessible to users who struggle to hear – or prefer to skim read.

Similarly, videos with transcripts or captions – even a text summary of the main points – enable people with hearing impairments to still access the content. People watching in noisy settings also gain.

Videos with no narrative may need audio description, unless the information is available in another format.

Interactions that work for all

If interactive elements or dynamic content can be controlled using the keyboard, people who cannot use a mouse will benefit.

If you know some of your website’s interactive elements (eg virtual reality) won’t work for some users, be open about it so people don’t lose time trying to make it work.

Don’t force interactions on people – users should be able to stop auto advancing content, such as slide carousels.

Menus that work for all

Most websites have navigation menus repeated on each page. These benefit disabled people if:

- Every menu and submenu item is accessible without using a mouse – press tab key to move and enter to select.
- Each item is visually highlighted as the user tabs to it.

- Users can skip over the menus with a “Skip to main content link” – see this guide’s Navigation section for more info.

Forms that work for all

If your web form is properly labelled for blind users, they know which information – name, address etc – to put in which field. Similarly, if they make an error, the alert needs to be accessible to their screen reader. Turning the dialogue box red is not accessible for a visually impaired user.

Creating and testing accessible forms (WebAIM) requires technical skill but there are also basic form checks to try (Web Accessibility Initiative).

Heritage sites demonstrating good practice

- The website for The University of Manchester’s Whitworth Gallery is an example of magnification without sideways scrolling – use Control + to magnify and reflow the page.
- Aisling Ghéar’s Theatre-focused website has examples of a consistent heading structure – use HeadingsMap in FireFox and headingsMap in Chrome to reveal headings.
- People’s Collection Wales’ website is a good example of image description.
- The MyRoute project website is an example of consistent audio and video transcripts.
- The Stonehouse Heritage project website has good keyboard accessibility

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Collaborative communities

Share accessibility challenges and solutions with others so that problems can be worked on collaboratively. Many online communities exist and can be great for getting support. Here are a few UK focused examples to explore:

- Conservation Research – enables discussion related to the conservation of objects, works of art and buildings.
- Google Groups on heritage and related topics.
- Heritage Arts Network – aims to share information and promote critical discussion around heritage and contemporary art practice.
- Heritage Chat – #HeritageChat is a monthly, one-hour Twitter chat for the historic environment sector.
- Heritage list – a discussion list for academic and industry researchers, heritage, tourism, museums and culture.
- Heritage Workspace Home – hosts discussion forums and groups focused on helping the heritage sector.
- Heritage Yorkshire – supports people engaged in heritage research in the Yorkshire region.

Twitter can be an excellent source of support – follow the Museum Disability Collaborative Network (@museumDCN) and others and search for hashtags like #HeritageChat or #MuseumHour.

Use mailing lists and social media to ask questions, offer suggestions and build supportive networks.

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Role related guidance

Role 1: website and page design

New website

If you are developing a new website, either someone else will build it for you or you will build it yourself using an online tool, for example WordPress, Wix or Google Sites. In either case, it is cheaper, less work and more sustainable to get accessibility right at the beginning rather than to fix it afterwards.

These are the things to consider:

Third-party suppliers or volunteers

If you rely on volunteers, talk to them about which of the practices in the Good practice section they are confident they can meet. You will need this information for your accessibility statement, which is discussed in the last section of this guide.

If you are paying a supplier, specify that they must meet Web Content Accessibility Guidelines 2.1 at level AA. Find out more about their testing strategy – do they include users of assistive technologies? Check if they work with and advise people in relevant roles like content editors. Can they advise you on tackling complex problems, such as image descriptions, captions etc?

Online tools, for example WordPress or Wix

Do online research to find out which of the different themes and styles you can choose are the most accessible. Include accessibility keywords in your search terms – for example, "most accessible WordPress theme."

Either or both

Avoid common bad practices that create accessibility barriers. These include:

- Slide carousels or background videos that can’t be stopped.
- Text over video or image backgrounds.
- Social media feeds that can’t be skipped over by a keyboard user.

See the Web Accessibility Initiative’s examples of common bad practices (and fixes). Mugo Web provide technical details about creating skip links for social media feeds.

Existing website

If you already have a website, some things will be easy to improve – for example page content is under your control. Other things may be harder to change. Where this is the case you can still support users by describing your accessibility strengths and weaknesses in the accessibility statement – see final section in this guide.

Explore the Good practice section in this guide. Note what works and what needs to be improved on your website.

If your website uses Wordpress, you should be able to update to a more accessible template if needed.

Perform website checks with automated accessibility checkers. These only identify 40% - 50% of issues but are good at finding colour contrast problems, missing image descriptions and problems with links and headings.

Free checkers for the Chrome browser include WAVE tool, Microsoft's Accessibility Insights tool and the aXe-web accessibility testing tool. Wave and aXe are also available for FireFox.

Unless you are technically skilled, some of the report may not make sense. Use what you do understand – for example poor colour contrast – to make any improvements you can – for example changing colour schemes.

Whether starting a new website or maintaining an old one, identify the accessibility practices you can and can't achieve. Note this for your accessibility statement – see the final section in this guide.

Role 2: creating basic page content

When creating basic page content (text, images and tables), you can only influence some aspects of website accessibility, but these are still important. Summed up in the acronym SCULPT, they include:

Structuring content

Use heading and subheading styles to identify sections. Use a tool like headingsMap plug-in for Chrome to check if the visual page headings match the heading levels in the code.

Colour and contrast

Ensure no information is conveyed only by colour. Keep colour contrasts strong.

Use of images

If an image is just for decoration, mark it by adding "" in the alt text dialogue box. If the image is important, describe the main points in the alt text dialogue box.

Links

Every hyperlink should have unique text, not "click here."

Plain English

Check the readability of your text. If your project uses specialist terms it may be hard to get the reading level down. Instead, provide a glossary for people new to the subject.

Table structure

Keep tables simple. If necessary, have several simple tables rather than one complicated one. Don't merge cells. Use row and column headings as needed.

More information

All these areas are covered in the Good practice section of this guide. More detail is available on the SCULPT for Accessibility website.

Role 3: creating downloadable content

The SCULPT principles also apply to downloadable content, including documents, presentations, and spreadsheets. A well-designed webpage is more accessible than most downloadable documents, especially PDFs.

If downloads are essential, these are good practices to follow:

- If you use a recent version of Microsoft Office, look for the inbuilt accessibility checker in the Review ribbon – this is an easy way to check accessibility.
- Make your Word documents accessible.
- If you create PDFs from Word documents, make sure they are accessible and offer both Word and PDF options for download.
- This advice from the Government Digital Service suggests when it is appropriate to use tables and how to create accessible tables.
- Practice the dos and don’ts of designing for accessibility as outlined on these posters from the Home Office.

Role 4: creating multimedia content

Videos, audio and interactive content can make websites more accessible to a wide range of people. However, they can also accidentally exclude blind users, deaf users or people who can’t use a mouse.

Minimise this risk in the following ways:

- Provide transcripts of video/audio narration. You can use a free voice recognition tool like Voice Typing (in the Google Docs tools menu) to create a script if needed. You can also use inbuilt dictation options on Macs, Windows 10, smartphones and tablets. Correct any mistakes before uploading.
- If your video is on YouTube, check to see how well YouTube’s automatic captioning has worked. You can manually edit YouTube captions for accuracy if needed.
- Let users know how to access YouTube’s automated captions.
- Videos with no narration (eg just music) need a separate text description for visually impaired users or an audio description track with the video.
- Using just the tab, spacebar, arrow keys and enter key, check any media players and interactivities (eg quizzes) work for keyboard-only users.

Role 5: social media

Social media can help build a community around your project. However, while it is easy to set up an account, it requires significant effort to make the most of it as an engagement and marketing tool.

No single social media platform is yet 100% accessible, so using more than one platform increases your chances of helping a disabled user to engage. Your practice helps too – here are some key points:

- Use Camel Case in hashtags so the screenreader reads each element individually – #SeeEly clearly refers to a location, whereas #seeely isn’t clear.
- Use alternative text on images.
- Avoid images of text (eg photos of posters) unless all the text is available in the alt text or social media post.
- If using videos, make sure subtitles are available.
- Use emojis sparingly – they can exclude and confuse, and they add extra words to screen reader output (eg “laughing face” and “smiling face”).

The RNIB guide on accessible social media or Inclusion Scotland guide to accessible social media (PDF) offer more tips. Large projects with dedicated social media staff may find the Social Media Playbook from the UK government website useful.

Role 6: webinars and online events

Online events offer advantages to many disabled people, but they can also create barriers. Minimise barriers in these ways:

- Ensure registration forms invite people to mention any additional requirements.
- Contact anyone identifying additional requirements to check how to support them. You may not have the skill, tools or budget to meet complex requirements, but discussions can help reduce barriers – for example by making a presentation available in advance.
- Be familiar with the accessibility options within the tools you use. PowerPoint and GoogleSlides have options to switch on automated captions. Some tools let users change font size in the text chat pane.
- Search for accessibility information on your webinar platform.
- Explore the Future Teacher guidance on creating accessible webinars.

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Accessibility, branding and communication

If a project receives more than 50% of its funding from the government, it is likely the Public Sector Bodies (Websites and Mobile Applications) (No. 2) Accessibility Regulations will apply to its website. This means they must aim to meet the accessibility requirement and produce an accessibility statement conforming to a model accessibility statement template from Government Digital Service.

Even if the regulations don't apply, accessibility is still a branding matter attracting praise or criticism.

Even with the best will in the world, it is not always possible to achieve 100% accessibility. You may rely on volunteers, or your tools may not create fully accessible content.

You might use techniques like virtual reality, adding value for some disabled people but excluding others. Different access needs can have contradictory requirements.

What matters is minimising barriers, maximising opportunities, being transparent and being responsive:

- **Minimising barriers.** Where possible, make sure your basic practices are accessible by following the guidance in the Good practice section of this guide.
- **Maximising opportunities.** Interactive elements can engage many disabled people, but you may not be able to make them equally accessible for everyone. Make sure the key information is available even if the full experience is not. For example, the interactive timeline for the Headway project has an accessible alternative for screenreaders.
- **Be transparent.** Make sure your accessibility statement is honest about what works, what doesn't work and whether you can fix it.
- **Be responsive.** Provide contact details so users can get in touch about any access difficulties. Being responsive encourages support and enthusiasm.

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Writing an accessibility statement

The best kind of accessibility statement is written in Plain English and is user focused. It helps users gain from your accessibility benefits and anticipate barriers.

This sample accessibility statement for public sector bodies from the Government Digital Service is a useful model.

Look around the culture and heritage sectors too – examples of different but effective practice includes Shabang's accessibility statement and the British Museum's accessibility statement.

The most important elements of an accessibility statement include:

- Telling users how they can benefit from your good practices in digital accessibility. Many users have modest computer skills and do not realise how an accessible web page or document can help them.
- Telling users what doesn't work and what can be done about it. For example, your downloadable PDFs may have poor accessibility, but you may be able to provide a Word version on request.
- Providing contact details so users can report difficulties, suggest improvements and, if necessary, escalate complaints.

If you are a public sector body, there will be some additional required text – see the links to the sample accessibility statement and look for the "legally required" sections.

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Conclusion

Your organisation's website and social media presence is a bigger solution than it is a problem for people with disabilities. Nevertheless, disabled people encounter many barriers. These can be avoided if website and content creators are aware of good practice.

By checking your practices with this guide's Good practice section, and by following the tips in the Role related section, you should be in a good position to improve your website's accessibility.

Creating an accessibility statement improves your users' experience by letting them know what works, where the barriers might lie and who to contact to stay involved.

And every person you keep on board is a potential advocate for your project.

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Sharing this guide

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You might also be interested in...

Image not found or type unknown
A woman holidaing a mobile phone, showing a man standing next to her something on th ephone screen. Minder Kaur Athwal, a trustee at the Digital Skills for Heritage-supported Heritage Trust Network. Credit: Sarah Hayes.

Digital Skills for Heritage

Working with open licences

04/03/2021
Photomontage
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Cold War Steve vs the RPG, Photomontage commissioned by Birmingham Museums Trust, Cold War Steve / Christopher Spencer CC0 1.0. Modified by Michael Gimenez to include the guide authors' faces, CC0 1.0.
04/03/2021
See all updates
This guide is designed to help heritage organisations meet The National Lottery Heritage Fund's open licencing requirement.

Attachment	Size
Digital guide Working with open licences	2.97 MB
Digital guide Working with open licences (Welsh)	3.09 MB

Digital

Overview

The National Lottery Heritage Fund's licensing requirement supports open access to the rich heritage in the UK and the exciting possibilities of digital transformation in the cultural sector. All materials created or digitised with grant funding are subject to this requirement, which was updated in September 2020.

Open licences and public domain dedications are tools that give the public permission to use materials typically protected by copyright and other laws.

Grantees agree to share:

- Digital outputs under a Creative Commons Attribution 4.0 International licence (CC BY 4.0).
- Code, metadata and media generated during the reproduction of public domain works under a Creative Commons 1.0 Universal Public Domain Dedication tool (CC0 1.0).
- As before, grantees must make these materials publicly available online for at least five years after the project end date.

If your project was submitted or awarded funding before September 2020, you can either adopt the new open licensing requirement or continue to work under the previous licensing requirement.

Who is this guide for?

This guide explains open licensing and provides a step-by-step approach to the open licensing requirement for each stage of your project.

It is aimed at The National Lottery Heritage Fund applicants and grantees but contains useful information for anyone who supports open access to cultural heritage.

Please note this guidance does not constitute legal advice.

Authors

This guide has been produced for The National Lottery Heritage Fund by Dr Andrea Wallace and Dr Mathilde Pavis as part of our Digital Skills for Heritage initiative.

Andrea and Mathilde are both Senior Lecturers in Law at the University of Exeter, with expertise in Intellectual Property and digital culture.

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Understanding open licences and the public domain

Open licences and public domain dedications are tools that give the public permission to use materials typically protected by copyright and other laws.

Copyright

Copyright will arise in any original content that you or others create, like:

- text
- visual works
- music and sound recordings
- films and broadcasts
- software, database content and computer programs

Copyright first belongs to the makers or producers of these materials and gives them exclusive rights over the works. Works protected by copyright cannot be used without getting permission.

Most countries automatically protect these works through copyright and other laws. This means creators do not need to register their works to receive legal protection.

Protected materials can be identified by the copyright symbol '©' or other rights information nearby. This notice informs the public that the work is protected by copyright laws.

However, copyright protects a work even when this information is not there. This makes it harder to tell whether permission is needed or the materials are free to use, and under what conditions. The safest route is to always assume a work is protected by copyright.

Open licences and public domain dedications reduce these default legal restrictions, making it easier for everyone to access and use materials found online.

Public domain

Not all works will be protected by copyright. These works are said to be in the 'public domain'.

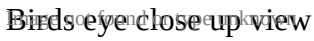
The term 'public domain' refers to materials that are:

- not protected by law, like facts and ideas
- not original enough for protection, like basic descriptive data

The public domain also includes all works for which copyright has expired.

Anyone can use any materials in the public domain for any reason, without permission.

The following image is marked with the CC BY 4.0 licence to show you what this looks like in practice.



Birds-eye close-up view of a wasp
Pepsis heros (Fabricius, 1798), The Trustees of the Natural History Museum, London, CC BY 4.0

What other rights might exist and who holds them?

Rights other than copyright can apply to materials. Below are brief descriptions of other rights you may encounter in the materials you and others create, use and share.

Performers' rights

Performers' rights can arise in films or sound recordings that capture a person's speech or movement. Performers' rights first belong to the person featured in the recording.

Database rights

Databases are protected under copyright and related rights. These rights belong to the maker or producer of the relevant materials.

Contractual rights

Contractual agreements between creators, producers, employers and distributors may apply to materials and limit their reuse. You may also sign agreements with contributors and donors that limit the reuse of materials.

Privacy and personal data protections

Your project may collect or include information about individuals protected by privacy or data protection laws, like the General Data Protection Regulation. These rights belong to the persons identifiable in the materials.

No rights

You might create or use materials that do not attract any rights, or in which the rights have expired. This can include public domain materials and their reproductions – as long as they do not contain any personal information or sensitive data about other people or communities.

Exceptions

Exceptions in the law may allow you to use, incorporate or share protected materials without seeking permission from the rights holder, although these are limited. Learn more about these exceptions at Copyright User and the Copyright Cortex.

Introducing open licences and tools

Open licences are upfront permissions that allow anyone to freely use, transform and share materials protected by copyright according to the terms of the licence. Open tools can be used to signal that materials are not protected by law or have been dedicated to the public domain.

Marking your materials with an open licence or tool

Anyone can publish their materials under an open licence or public domain dedication. Many funders have open licensing requirements to ensure funded materials are made freely available to the public.

Creative Commons (CC) is an organisation that provides a range of open licences and tools to publish original and public domain content. You can publish your digital outputs by marking them with CC licences and tools. There is no need to register your organisation or the materials anywhere.

You can publish someone else's materials with a licence or tool only if they give you permission to do so.

Creative Commons (CC) licences and tools

Creative Commons (CC) licences and tools are widely used by the heritage sector globally because they are recognised and trusted by users. These standardised licences and tools give anyone coming into contact with your materials a clear and reliable understanding of how they are allowed to reuse them.

CC licences and tools are available in more than 40 languages. They are designed to release materials worldwide.

They are also machine readable and searchable online. This means they can be read by computers and returned in searches by people looking for open and reusable materials.

What is the difference between a CC licence and a CC tool?

CC licences can be used for materials protected by intellectual property law. This will be the case for most of the content you create during the project.

CC has two licences for openly licensing original content: CC BY and CC BY-SA. Other CC licences are not 'open' because they restrict commercial reuse (like CC BY-NC).

CC tools can be used for materials in the public domain or for materials the rights holder dedicates to the public domain. CC has two tools for public domain content: CC0 and the Public Domain Mark.

Because the public domain is defined by law, what is not protected by copyright can vary from one country to the next. This is why CC often recommends using the CC0 1.0 tool instead of the Public Domain Mark. The CC0 1.0 tool operates as a 'no rights reserved' alternative or fallback licence for users in any country. The Public Domain Mark should only be used for very old works or non-original materials known to be in the public domain worldwide.

For more information on CC tools and licences, visit the Frequently Asked Questions about Creative Commons section of their website.

Case studies: Using wiki to share open materials

The word 'wiki' refers to a website built using collaborative editing software. Many UK heritage organisations share open digital content through wiki-based sites.

Wikipedia & Wikimedia UK

Wikipedia is a well-known wiki-based website. The Wikimedia Foundation and its UK chapter support Wikipedia and other sites, like Wikimedia Commons and Wikidata, that enable millions of users worldwide to access and share materials.

Materials contributed must be openly licensed or dedicated to the public domain. This ensures everyone can freely use and reuse what is shared.

University of Edinburgh

The University of Edinburgh Wikipedian in Residence Ewan McAndrew and student intern Emma Carrol combined a 2003 Survey of Scottish Witchcraft (1563-1736) dataset with data from archives, like historical maps and surveys.

They cross-referenced the residences of the almost 4,000 people accused of witchcraft with their modern-day locations. This new dataset was then uploaded as CC0 to Wikidata and visualised on a digital map.

National Library of Wales

The National Library of Wales and Wikipedian in Residence Jason Evans used Wikimedia platforms to reach local and global audiences.

Infographic - refer to description beneath image
Impact of sharing with Wikimedia during the residency, Jason Evans, CC0

Image description

Infographic image produced for a report on the Wikimedia UK Residency at the National Library of Wales. It shows that between April 2015 and April 2017, material shared by the National Library of Wales on Wikimedia generated:

- 265million image views
- 115 language editions using National Library of Wales images
- 22 media appearances
- 8,000 third party media uploads

The Scottish Wildlife Trust

The Scottish Wildlife Trust shares materials under the CC BY-SA open licence on a dedicated MediaWiki page so more people can collaborate and contribute to tackling climate change and biodiversity loss.

Imperial War Museum

The Imperial War Museum shared metadata as CC0 and uploaded it to Wikidata.

This work led to exciting new projects too. Data Developer James Morley used this data and other open datasets to create the website A Street Near You. Users can enter a postcode or address to locate people in their community who served and died in the First World War. The project went viral, reaching more than 240,000 people in three days.

Expand All accordions

Benefits of open licences

Open licences and public domain dedications expand access to heritage and enable new, innovative and entrepreneurial uses of your digital outputs.

Your outputs can be connected with other open content or used to make entirely new works. This ensures the widest possible number of people can benefit from your organisation's work.

Public benefits

Public benefits might include:

- Schools and universities using your materials in their educational resources.
- Other organisations connecting their digital resources with your materials or developing new services for the heritage sector around your digital outputs.
- Millions of users engaging with your materials through open knowledge platforms like Wikimedia Commons, Wikipedia and Wikidata.
- Citizen science and volunteer engagement using your materials to generate new knowledge.
- Scholars and engineers using your materials to innovate in AI, machine learning, computer vision and computational research.

Organisational benefits

Organisational benefits might include:

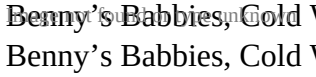
- More public engagement in line with your organisation's missions.
- Bringing heritage to the foreground because more collections can be viewed and engaged with online.
- Creative reuse and remixing of your materials by the public.
- More media coverage and academic and public interest.
- Increased traffic to websites, digital platforms and interactions on social media.
- Cost savings associated with rights and reproduction overhead through self-service media delivery.

Examples of creative reuse and remixing

> *"Isn't it right that we do what we say we do, reflect Birmingham to the world, and the world to Birmingham? Our audience isn't only locally in Birmingham. We want to share things worldwide; the benefits should be global."*
>
> *Linda Spurdle, Digital Development Manager at Birmingham Museums Trust*

In 2018, the Birmingham Museum and Art Gallery freely shared their public domain artwork collections with the public as CC0. They also collaborated with artist Cold War Steve and the collective Black Hole Club to remix the collections.

Cold War Steve later shared his own creations as CC0 and encouraged the public to make installations of his artworks through the 'You, Me & Cold War Steve' international exhibition project.



Benny's Babbies, Cold War Steve CC0

Welcome to the open movement

Connect with others

Almost 900 cultural institutions, organisations and universities have released digital outputs under open licences or to the public domain. You can see the ongoing list of these organisations, including those in the UK, on the Open GLAM Survey managed by Douglas McCarthy and Andrea Wallace. (CC BY)

See it for yourself

Give it Away to Get Rich is a video by Effie Kapsalis (Senior Program Officer for Digital Strategy, Smithsonian Institution) summarising her research on the benefits cultural organisations have seen after releasing high-quality images to the public domain. (2016)

Hear it for yourself

Interviews with Linda Spurdle (Digital Development Manager, Birmingham Museums Trust) on the Digital Works podcast (2020) and with Douglas McCarthy (2020, CC BY) highlight the exciting opportunities and benefits following the release of the public domain collection as CC0.

Keep passing it on

The UNESCO open Educational Resources website has reports, openly-licensed materials and other useful tools for preparing your project to be reused by the public in a range of exciting ways. It includes how to promote your materials for educational reuse.

Expand All accordions

The National Lottery Heritage Fund open licensing requirement

All projects supported by The National Lottery Heritage Fund agree to share their digital outputs through an open licence or public domain dedication. This requirement applies only to works created with the project funding.

The open licensing requirement

Original content

All projects will apply the CC BY 4.0 licence to all original content created during the course of the project.

You continue to own the works produced under the grant. The CC BY 4.0 licence allows everyone to share and adapt your works for any purpose, even commercially. Users must attribute you and indicate whether any changes have been made.

You will need permission to use a different licence. To do so, please get in touch with your contact at The National Lottery Heritage Fund.

Code and metadata

All projects will apply the CC0 1.0 tool to all code and metadata created during the course of the project, like software code or technical data generated during digitisation.

The CC0 1.0 tool tells everyone that the works are in the public domain and any rights have been waived worldwide to the fullest extent allowed by copyright and database law. Users can copy, modify, distribute and perform the work, even for commercial purposes, without first seeking permission.

CC0 button and icon logos
Left: Creative Commons Public Domain Declaration (CC0) button. Right: CC0 icon

> *"Our new licensing requirement helps us to increase access to the UK's rich heritage and promote the innovative use of digital across the sector."*
>
> *Josie Fraser, Head of Digital Policy, The National Lottery Heritage Fund*

Scope of the open licensing requirement

What materials does the open licensing requirement apply to?

The open licensing requirement applies to all funded projects of all sizes, and all materials created and commissioned as a result of the funding.

Examples include:

- images and 3D models
- text, research and datasets
- software, metadata and code
- educational materials and exhibition catalogues
- project reports and publications
- web and app content
- sound and video recordings

Not everything created in the course of your project, like emails between team members and records of meetings, must be shared or openly licensed. We do however encourage you to share any workflow processes, findings and other work as openly as possible for the benefit of others.

Projects are not allowed to 'hold back' higher resolution or better-quality digital outputs they produce. Everything should be published under the appropriate licence or public domain dedication.

If you are worried about hosting, your contact at The National Lottery Heritage Fund can help you find a solution.

How does the requirement apply to projects digitising public domain works?

You cannot claim new rights in any non-original materials generated when reproducing public domain works with grant funding. This includes but is not limited to faithful reproductions of public domain works (like scans and 3D data) and the other materials generated (like metadata and paradata).

To make sure these materials are not mistaken for materials under copyright, you should clearly identify these public domain assets using the CC0 1.0 tool.

Working with third party materials

Third parties might include:

- paid suppliers
- commissioned creators
- unpaid collaborators
- members of the public.

New third party materials are subject to the open licensing requirement, with exceptions allowed. Pre-existing materials require the third party's permission to be openly licensed.

How does the requirement apply to new materials created by third parties?

There is an expectation that all materials created during the project are shared under the open licensing requirement. This should be discussed early on with third parties so that any exception to use an alternative licence can be requested, if necessary.

Where third parties are paid, the open licensing requirement should be included in the contract. Examples include:

- Freelancers contracted to create content, like photographs or social media posts.
- Computer programmers or engineers who create new code, platforms or apps.
- Artists who are commissioned to remix or create new works.

The National Lottery Heritage Fund funded A guide to copyright and working with suppliers to create digital content (2023).

Where third parties are unpaid, the open licensing requirement should be consented to. Examples include:

- members of the public who make contributions of interviews or other creative works during research or community workshops .
- volunteers or users who contribute to your digital platform

How does the requirement apply to existing materials created by third parties?

If your project uses pre-existing materials, you need permission from the rights holder to apply the open licensing requirement.

For example, if your project establishes an archive, the new materials funded by the project must be openly licensed. Examples include:

- guidance on how to use the archive
- a publication about the archive
- curators' notes and research
- outputs made by or with third parties
- even the platform itself, if developed with grant funding

If your archive incorporates existing materials, the rights holder decides whether they can be openly licensed.

- if your organisation owns the rights, this is your decision
- if a third party owns the rights, you cannot openly license the work without their permission

You can still use the materials and make them available in your archive. Just let users know which works are protected by copyright and attribute the rights holder, if known.

Making your materials publicly available

How long should project materials remain publicly available?

Digital outputs need to be publicly available for at least five years from the project completion date. This will vary with the overall value of your project (in the case of larger awards, this requirement extends to 20 years).

Digital outputs can be published anywhere online as long as the public has free and unfettered access to them. People should not be required to register, fill out forms or seek special permission to access and download your materials.

They can be housed on your website or project platform. You can also use free repositories, like Wikimedia Commons or GitHub.

Open licences and tools are irrevocable. This means your digital outputs will remain openly licensed even after five years. In other words, once a work is released under an open licence, the public always has the right to use it under the relevant terms and that permission cannot be withdrawn. Requests to take down the work can always be made. But keep in mind it may not be possible to take down all copies of a work online.

Selecting the right platform to share materials

Always make sure the platform used to share materials can support the licence, so you can reach more people with your project. You can find this information in the terms and conditions or licensing features of the platform you wish to use. This will increase the sustainability of the materials' publication, access and reuse.

For example, YouTube allows creators to use the CC BY or the Standard YouTube Licence. Publication under other terms would require editing the video descriptions to include the alternative licensing information.

The Frequently Asked Questions on Creative Commons and Open Access and the Fact Sheet on Creative Commons and Open Science have more guidance about how to openly licence materials. (2017, CC BY)

This article by Kelly Fitzpatrick (2017) discusses how four cultural organisations use GitHub to share data and code.

Expand All accordions

Exceptions to the open licensing requirement

You should plan your project according to all the funding requirements, including the open licensing requirement. This may raise concerns around some project outputs. For example, you may decide some materials are not appropriate to share openly. You should raise any concerns with your contact at The National Lottery Heritage Fund as early as possible.

Exceptions for sensitive materials and data

Examples of materials that may not be appropriate for open licensing for ethical reasons include:

- images of, or contributions by, children, young people and vulnerable adults
- artefacts, knowledge or memories of cultural significance to the communities of origin
- ancestral remains, spiritual works or funerary objects
- research, data or other media produced around the above examples

Exceptions for pre-existing materials

Projects should seek to obtain permission to release pre-existing materials from third parties wherever possible. There may be reasons why permission is withheld, and if so these contributions can be excluded from the open licensing requirement.

Share your experience

If you develop a creative or useful approach to these considerations, others will find that experience helpful. Please share these approaches publicly, with The National Lottery Heritage Fund or contact the authors of this guide. We would like to learn more about your experience.

Case studies: Care in collections management

Collections connected to colonialism

The British Library is undergoing a review of the collection of rare books owned by figures who may be associated with wealth obtained from enslaved people or colonial violence as part of its commitment to become an actively anti-racist organisation. The library also makes available an index of previous owners associated with the collections' items and a directory of Western printed heritage collections at the British Library.

Ethical terms of reuse

The Qatar Digital Library's Copyright & Ethical Terms of Reuse policy acknowledges that some cultural materials in the public domain should not be altered or used in ways that can be harmful to the communities of origin. The library recognises that broader rights and interests should apply and requires informed consent of the communities for any commercial use of these materials.

Cultural permissions

The Auckland Museum's Image Orders and Cultural Permissions policy embeds M?ori and Moana Pacific values into the guiding frameworks for all collections, digitisation and rights management. Using the 'open as a rule, closed by exception' approach, the museum creates filters for levels of openness to protect sensitive materials. It uses a cultural permissions policy that treats access and reuse as separate from intellectual property rights frameworks.

Expand All accordions

Applying the open licensing requirement

The open licensing requirement applies to all of your project materials unless third party rights or other exceptions apply. This section provides a step-by-step approach to meeting the open licensing requirement at each stage of your project.

Stage one: Planning your project

When developing your project idea, you should consider what digital materials you will produce and how they will be publicly shared.

Start by making a list of all of your expected outputs, for example:

- an audio guide
- images and videos of your project
- web content or galleries

Then, identify the rights that could exist in these outputs and who owns them. You do not need to submit this list with your application.

At this stage you should consider whether materials are appropriate for digital access or open licensing. For example, this may require seeking exceptions for ethical reasons – see the exceptions section of this guide.

Remember, at this point you are just planning your project and creating a list to guide your project submission and its management, if successful. You should not start work on your project, including collecting permissions, until your award has been made and you have formal permission to start. Even so, it is important to make any project partners aware of The National Lottery Heritage Fund open licensing requirement.

Stage two: Submitting your application

Your submission should mention any key digital outputs that the project will produce and release according to the open licensing requirement. You should indicate whether third party or sensitive materials may require exceptions.

If your application is successful, you can use your list from stage one to work out how the open licensing requirement applies to your materials and any materials you use.

The next section includes a guide to help you think this through.

Making a list of outputs and rights

Your list should itemise:

- new materials
- pre-existing materials
- rights that might exist

This documentation will be useful for getting permission to apply an open licence, getting an exception to use an alternative licence if necessary, and crediting the creators.

New materials include:

- a photograph of the project taken by a team member or volunteer

- a virtual tour of a UK wildlife habitat
- a website about whale migration patterns in the UK
- digital reproductions of new creative works produced during a project workshop

Entirely new materials are subject to the open licensing requirement and must be released under the CC BY 4.0 license or CC0 1.0 tool. Exceptions can be requested.

Pre-existing materials include:

- a botanical engraving scanned from a book in your collection
- digitised entries from a diary donated to your organisation
- a digitised video of an interview made by an unknown journalist in your archive
- a digitised collection of photographs owned by donors

Third parties may hold rights in these materials and must consent to the open licensing requirement.

Rights in the materials might include:

- copyright
- performers' rights
- database rights
- contractual rights
- privacy and personal data protections
- no rights

These rights are discussed in the introductory section on copyright.

Exceptions:

Finally, consider whether any exceptions are appropriate. The exceptions section of this guide can help you identify these and how to proceed.

Stage three: Starting your project

If your project is successful, you will be able to begin immediately following formal permission to start.

You should make sure partners and collaborators are aware of the open licensing requirement as early as possible. These conversations can shape the way you:

- organise your materials and the project workflow
- collect formal permissions, where necessary
- mark materials with an open licence
- credit and acknowledge any rights holders
- release outputs

This process will make the output management and publication more efficient. The first step is getting informed consent from third parties to apply for an open licence.

How do I get informed consent to use an open licence?

Ask third parties to grant permission to licence their materials. Make sure to get their permission in writing. You can do this in an email, a signed electronic document or hard copy form.

Make sure third parties understand how you intend to use the materials and any implications of open licensing. For example, you could share this guide with them, or any other resources that you find helpful.

What if consent to use an open licence isn't given?

Ask for a licence to use the materials for your organisation's own purposes.

The National Lottery Heritage Fund does not expect you to ask for an assignment of rights or exclusive licence:

- Assignments require third parties to hand all rights in a work over to you.
- Exclusive licences prevent the creator from licensing their work to anyone else.

Both restrict the ability of creators to use their own works. Neither is necessary. A non-exclusive licence should be all you need.

Your agreement with third parties should aim to be equitable for everyone involved. An equitable agreement should use clear and fair terms for third party permissions or licences. The National Lottery Heritage Fund is happy to assist you in this process if you have questions.

What if I don't know who to ask for consent?

Sometimes it is not possible to locate the rights holder to get permission. We call works like these 'orphan works'. Legal exceptions may allow you to use, incorporate or share these materials. Learn more about orphan works at Copyright Cortex, Copyright User and on the UK Intellectual Property Office website.

As an example, the National Galleries Scotland's Orphan Works and Take Down policy lists all the authors of orphan works alongside instructions to make a 'take down' request. This approach respects the intellectual property rights that exist in the works and enables anyone to come forward with information to help locate the rights holder.

Stage four: During your project

With any project, plans sometimes change. Third parties can change their mind on how their materials should be used. Design your project in a way that allows third parties to withdraw participation. This is compliant with data protection law. Learn more about data protection and privacy in our digital guide to online privacy and security.

In addition, you might select a new format or platform for the project materials. Re-contact third parties to inform them of these changes and reach new agreements, if necessary.

Stage five: Applying the licence or tool

At this stage, you should apply the licence or tool to your project materials. This means marking your project outputs similar to the various examples throughout this guide.

Clearly communicate the licence or public domain dedication when making your materials publicly available. You can do this by including the licence or public domain dedication immediately after the citation along with a link to the terms of reuse. Include the button or icon when possible. Creative Commons also has guidance on how to give attribution.

For example, this guide is licensed CC BY 4.0. This is communicated as:

‘Working with open licences: a guide for projects’, Andrea Wallace and Mathilde Pavis (2021), supported by The National Lottery Heritage Fund, CC BY 4.0.

The best place to communicate this information is near the work or in another obvious location. For example, with:

- works published online, immediately beside the work
- publications like a book, on the title page
- audiovisual material, in the credits of the film, video or sound recording
- slide deck, on the introductory slide or at the end with other credits
- Word document or pdf, in the introductory information or at the end with other credits
- website, in the footer and the terms of use

You should also embed this information and/or URI link in the metadata. Common fields for rights information include dc:rights or edm:rights.

Marking your project materials

For materials you create and hold rights in, you have two options. You can use either the CC BY 4.0 licence or the CC0 1.0 tool. The terms for each option are included below for reference. The next section contains examples of their use by UK organisations.

CC BY 4.0

With the **CC BY 4.0 licence**, the public is free to:

- **Share** – copy and redistribute the material in any medium or format.
- **Adapt** – remix, transform and build upon the material for any purpose, even commercially.

Under the following terms:

- **Attribution** – users must give appropriate credit, provide a link to the licence, and indicate if changes were made in a reasonable manner, but not in any way that suggests you endorse the user or use.

  Image not found or type unknown
  CC BY button and icon
  Left: CC BY 4.0 button. Right: CC BY icon

CC0 1.0

With the **CC0 1.0 tool**, the public can:

- **freely** build upon, enhance, distribute and reuse the material
- **for any purposes**
- **without restriction** under copyright or database law

You must apply the CC0 1.0 tool to following categories of outputs:

- any code and metadata created during the course of the project
- media generated during the reproduction of public domain works, such as photographs, digital surrogates and 3D scans

The next section includes examples of licences, tools and citations in practice by UK organisations.

Marking restricted materials

Not everything in your project will be subject to the open licensing requirement. You should communicate to the public which materials are not available for public reuse.

Using other labels to mark restricted materials

We recommend you use the RightsStatements.org labels to mark materials restricted by rights.

RightsStatements.org is an organisation that has designed 12 standardised labels that can be used when CC tools and licences cannot be applied. For example, these labels can be used to mark in-copyright works, orphan works or sensitive materials in which other restrictions may apply.

Rights Statements labels: In Copyright, Unknown Rightsholder and Other Legal Restrictions

For in-copyright works, the appropriate label is In Copyright accompanied by, for example, '© The National Lottery Heritage Fund'.

For orphan works, the appropriate label is Unknown Rightsholder with accompanying text 'All rights reserved'.

For sensitive materials appropriate for online access, the appropriate label is Other Legal Restrictions with accompany text 'Permissions apply'.

How do I communicate what materials are restricted in my project?

For outputs that incorporate multiple materials with different rights statements, you should display the individual rights statements next to each work.

You can do this using text like ‘All rights reserved’ or by attributing the rights holder near the work with the copyright symbol. This communicates to the public that the work is in copyright.

The Getty Institute provides examples on how to best do this. You can see how the Institute applies this in practice in the publications on their virtual library and in the illustration below.

> Infographic image with the title ‘Navigating multiple licences and maintaining rights information’
> Credit: Andrea Wallace, CC0 1.0

Image description

Infographic image with the title ‘Navigating multiple licences and maintaining rights information’. The image is a stylised representation of the title page of a publication. The page is white with a brown heading reading ‘Project Output’ in capital letters. This heading is followed by a subheading in the same colour reading ‘Your info’ comma CC BY 4.0. A black arrow points to this line and indicates that it should include your information and the CC tool or licence. The page also features a stylised image of a rainbow against a blue background. You can read ‘Image’, the copyright symbol, and ‘Info’, written in pink in the caption below the image. A black arrow points to the text in the caption and indicates that it should include the citation for the image and rights information. Black bullet points and black straight lines to the right of the image invoke text filling the rest of the cover page.

Expand All accordions

Examples in practice

There are many ways to cite a work with the open licence or public domain dedication. Although the CC0 tool does not legally require users to attribute the source, providing a citation will enable them to do so more easily. This section provides examples in practice by UK organisations.

Images

Wellcome Collection

Purple jar

Image not found or type unknown

The Wellcome Collection makes a range of original materials available under the CC BY licence.

Purple medicine jar. Credit: Wellcome Collection. Attribution 4.0 International (CC BY 4.0).

Birmingham Museum & Art Gallery

Elaborate certificate

Image not found or type unknown

Birmingham Museums Trust releases images of public domain works for reuse under the CC0 1.0 Universal Public Domain Dedication tool via the Digital Image Resource platform.

Certificate of thanks, Illustrated by I. E. Harper. Birmingham Museum & Art Gallery, CC0 1.0.

Data, 3D data and datasets

Some projects will create datasets, metadata and code. In these cases, consider drafting a metadata specific policy that makes clear users may access and reuse these materials made available as CC0.

University of Dundee

The University of Dundee Museum, the Scottish Maritime Museum and the Science Museum Group release 3D models CC0 via Sketchfab.

Natural History Museum

The Natural History Museum makes high resolution images and datasets available for download through the Data Portal.

Sharing your materials

Once your project materials are ready to be shared, you should consider which platform you will use to deposit your materials. Digital outputs need to be publicly available for at least five years from the project completion date.

Explore your options

The British Library uses GitHub to release data CC0. The National Library of Wales has converted its metadata collection to Wikidata, which requires data to be released CC0 for platform integration.

Other organisations, like the Royal Botanic Gardens, Kew and the National Library of Scotland release materials and metadata through their collections integration with Europeana. Newcastle Libraries uses Flickr to release images CC BY.

Many organisations also openly release their Application Programming Interface (APIs). Open APIs enable software to integrate CC0 metadata and run commands in order to create new products and applications around open materials.

Support good citation practice

You can support good citation practices by providing the credit you would like to accompany the works as they are reused. Users can copy and paste this information easily.

Update your website's copyright policy or terms of use to convey materials produced with funding from The National Lottery Heritage Fund are available for reuse.

The Annex section of this guide has sample terms that can be copied and modified for your website policy.

If you find anything in this resource helpful, you are welcome to repurpose the text in your own policy or rights management documentation.

We would appreciate acknowledgement by a credit similar to the one below:

Some of the guidance in [this resource] has been repurposed from 'Working with open licences: a guide for projects', Andrea Wallace and Mathilde Pavis (2021), supported by The National Lottery Heritage Fund, CC BY 4.0.

More on copyright and open licensing

OpenGLAM Medium

The OpenGLAM Medium has many articles on how to implement open access, like this series by Anne Young (Director of Legal Affairs & Intellectual Property at Newfields). Articles are published CC BY or CC0, which means they can be translated into other languages for greater impact.

Copyright User

CopyrightUser.org is an online resource to make UK copyright law more accessible to anyone who makes or encounters copyright protected works. It includes guidance on how to understand, license and respect the rights recognised by UK copyright law. (CC BY, 2020)

GLAM3D.org

GLAM3D.org is an online resource for anyone from beginner to expert level on how to create, manage and release a 3D open access program. (CC BY, 2020)

Copyright Cortex

The Copyright Cortex is an online resource dedicated to copyright law and digital cultural heritage. It was developed to provide cultural organisations with information and expert commentary on how copyright law affects the creation and management of digital heritage. The website contains an ongoing catalogue of research, resources and evidence, and an open access text on UK copyright law and heritage management called Copyright 101. (CC BY-NC)

RightsStatements.org

The RightsStatements.org Guidelines for Applying the Rights Statements provides more practical advice on how to embed and display the rights statements with digital objects. (CC0 1.0)

The CC Certificate

Learn more about Creative Commons licences and tools through their open access certificate programme.

Expand All accordions

Annex: draft terms and conditions for your website

When your digital outputs are ready for publication, you can use or adapt the text below for your terms of use. Terms of use tell your web visitors how they can engage with the information or the materials you have made available, whether on your website or another platform.

General terms of use

Reusing materials on our website

Much of the content on this website is protected by intellectual property rights. Some materials produced with the support of The National Lottery Heritage Fund are released under Creative Commons open licences and tools. These materials are free for you to download and reuse under the terms below.

How to identify open access materials

Our open access projects and materials include [insert a list and link to the outputs].

With materials marked with the **CC BY 4.0 licence**, you are free to:

- **Share** – copy and redistribute the material in any medium or format.
- **Adapt** – remix, transform and build upon the material for any purpose, even commercially.

Under the following terms:

- **Attribution** – users must give appropriate credit, provide a link to the licence, and indicate if changes were made in a reasonable manner, but not in any way that suggests we endorse the user or use

These materials are protected by copyright and have been openly licensed for any reuse purpose, as long as these terms are followed. Learn more about the CC BY 4.0 licence on the Creative Commons website.

Where possible, these materials are accompanied by the following button or icon:

CC BY button and icon

With materials marked with the **CC0 1.0 tool**, you can:

- **freely** build upon, enhance, distribute and reuse the material
- **for any purposes**
- **without restriction** under copyright or database law

These materials are in the public domain. Learn more about the CC0 1.0 tool on the Creative Commons website.

Where possible, these materials are accompanied by the following button or icon:

CC0 button and icon

Public Domain Usage Guidelines

This text was drafted by Creative Commons and Europeana and can be included on your website to support users in their reuse of public domain materials.

Public domain materials can be used by anyone, for any purpose, without restriction. We ask that you use the following guidelines when making use of public domain materials.

Give credit where credit is due

When you use a public domain work please credit the author or creator. Please also credit the institution (such as the archive, museum or library) that provided the work, as the more you credit the institution the greater the encouragement to put more public domain works online.

Protect the reputation of creators and providers

When you use or modify a public domain work you should not attribute the changes to the creator or the provider of the work. The name or logo of the creator or provider should not be used to endorse the modified work or any use of it without their consent.

Show respect for the original work

Please do not use the work in any way that is unlawful and misleading. When you modify and redistribute a public domain work, any changes made to the original should be clearly indicated. You should label the work to show you have changed it, so that other users know who made the changes.

Show respect for the creator

If the creator, or provider on behalf of the creator, has asked that a public domain work should not be changed or that it should be used in certain contexts only, then please respect their wishes.

Share knowledge

If you use a public domain work to generate new work or if you have additional information about it (such as where it came from, its author, content or other possible rights holders), please share your knowledge. That may include tagging, annotating or commenting on a public domain work that is published online and

sending back this information to the institution that holds the original object.

Be culturally aware

If the work includes culturally sensitive elements you should not change or use these in ways that might be derogatory to other cultures or communities.

Support efforts to enrich the public domain

Users of public domain works are asked to support the efforts of cultural and scientific heritage organisations to care for, preserve, digitise and make public domain works available. This support should include monetary contributions or work in kind, particularly when the work is being used for commercial or other for-profit purposes and the provider is a public or non-profit institution.

Preserve public domain marks and notices

Users of a public domain work should not remove any public domain mark or notice that has been applied, or provide misleading information about its copyright status.

This usage guide is based on goodwill. It is not a legal contract. We ask that you respect it.

Telling users about your openly licensed materials

Organise information on your website

The Metropolitan Museum of Art has two web pages for reuse policies. One is for Image and Data Resources , which discusses the open access policy, includes screenshots and links to thematic sets of images for users to dive into. Another is for Frequently Asked Questions: Image and Data Resources, which goes into more detail for the more risk averse or cautious user.

The Smithsonian Institution takes a similar approach with an Open Access FAQ that clearly explains how users can reuse, transform and share digital assets without asking permission. It encourages users to ‘Create. Imagine. Discover’.

Give clear guidance on access and reuse

The York Museums Trust’s Image Policy & Requests clearly sets out what users can expect when encountering open access images published in the online collection. It includes screenshots and instructions on how to download, along with guidance on how the images can be used.

See what others are doing

The ‘Rights Policy or Terms of Use’ column in the Open GLAM Survey contains other examples of website terms in use by cultural organisations around the world.

Expand All accordions

Thank yous

The authors extend their thanks to Josie Fraser, Head of Digital Policy at The National Lottery Heritage Fund, for her support with this guide.

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Finally, thank you to the UK cultural institutions and organisations that have published their materials using the CC BY licence and CC0 tool. These images were crucial to illustrating this guide with in-practice examples of how to share materials through open licences and tools.

Sharing this guide

This guide was produced by Dr Andrea Wallace and Dr Mathilde Pavis at the University of Exeter for The National Lottery Heritage Fund.

Contact the authors by email:

- Andrea Wallace: A.Wallace@exeter.ac.uk
- Mathilde Pavis: m.pavis@exeter.ac.uk

Please cite this resource as: ‘Working With Open Licences: A Guide For Projects’, Andrea Wallace and Mathilde Pavis (2021), supported by The National Lottery Heritage Fund, CC BY 4.0.

Creating digital resources: GDPR, copyright and using open licences

18/01/2023
18/01/2023
See all updates
A new toolkit to help heritage projects openly licence digital materials, in line with copyright and privacy rules.

Attachment	Size
Digital Guide Creative Commons licences A guide to data protection and copyright	1.95 MB
Trwyddedau Creative Commons: Canllaw i Ddiogelu Data a Hawlfraint	1.98 MB

We are committed to making sure that the work we fund benefits as many people as possible.

It’s crucial that our audiences can access and use the digital resources we fund. That’s why we ask projects to make sure the images, documents, web pages, code and other digital resources they create are accessible, available and open.

Download the new toolkit, Creative Commons Licences: A Guide to Data Protection and Copyright, from this page under the contents section.

Digital in the heritage sector

Digital is an increasingly essential part of how we preserve, learn about and connect to heritage.

Understanding how copyright and data management rules apply to the resources we put online is especially important. Heritage projects often deal with materials that are still in copyright and involve living people who have legal rights.

We understand that producing some digital resources can be difficult – particularly where resources are created by contractors, volunteers or the public, or feature information about living people.

How we can help

Licensing requirements – which have been in place for over 12 years – were reviewed and updated in 2020. In 2021, we created introductory guidance to help projects better understand copyright rules and how open licences work.

We now have our new practical toolkit, Creative Commons Licences: A Guide to Data Protection and Copyright, available to download from this page, which provides step-by-step support to the sector for open licencing.

Who is this guide for?

This digital guide includes information on data protection and copyright, along with a range of tools, templates, checklists and frequently asked questions to help you take the right steps in open licencing and meeting GDPR requirements.

It is aimed at The National Lottery Heritage Fund applicants and grantees and provides guidance on the default CC BY 4.0 licence requirements for your project outputs.

Authors

The toolkit has been produced for the Heritage Fund by Naomi Korn Associates as part of the Digital Skills for Heritage initiative.

Expand All accordions

Digital project outputs

Digital heritage outputs created with grants from the Heritage Fund need to be available online and openly licensed under the terms of a Creative Commons Attribution 4.0 International (CC BY 4.0) licence.

Data protection rules mean that digital outputs that include information about living people require specific permissions or approaches before these materials can be shared online or an open licence applied. Copyright necessitates that all rights need to be cleared before content is published online.

This guide provides a summary of the data protection and copyright requirements associated with different types of digital outputs and how these relate to the default CC BY 4.0 licence, to help you better plan your project.

Expand All accordions

Data protection considerations

If you are planning an application to the Heritage Fund to carry out a project, the planned outputs of your project may include images, audio or other information relating to living individuals. Where this material could identity a living individual, then this is 'personal data' and you have several obligations you must fulfil around data protection law.

If you are going to be using personal information in your digital outputs, for example, images, film, audio or written text, you will have to comply with data protection laws.

This guide provides a range of tools, templates and guidance to consider the issues and help you take the right steps. In line with data protection rules, you will need to document your approach and any permissions you collect.

About data protection

Data Protection is an important legal requirement. Getting it wrong could lead to risks to individuals' privacy or safety, your organisation's reputation and can lead to financial penalties (including fines). We live in a data-driven world.

Sharing data can make life easier, more convenient and connected for us all. Data protection law sets out what should be done to make sure everyone's data is used properly and fairly.

Generally speaking, data protection law applies to all workplaces, business ventures, societies, groups, clubs and enterprises of any type. That includes you if you're a sole trader or self-employed, if you work for yourself or if you're an owner or director. It also applies if you only employ a handful of staff or even if you don't employ any staff at all.

Definitions

- **Data Protection Law**: data protection law covers the General Data Protection Regulations (UK GDPR) and Data Protection Act 2018.
- **Data Controller**: an organisation that collects and makes decisions about how personal data will be processed.
- **Data Subject**: the subject of the personal data/the individual which the personal data relates to.
- **Digital Outputs**: content created during the course of the project and arising as a result of funding from the Heritage Fund.
- **Information Commissioners Office (ICO)**: the UK's regulator on data protection law.
- **Explicit Consent**: a very clear and specific statement of consent. Explicit consent must be expressly confirmed in words, rather than by any other positive action.
- **Personal Data**: personal data is information that relates to an identified or identifiable individual. What identifies an individual could be as simple as a name or a number or could include an IP address or other factors.
- **Special Category Data**: in all cases, extra consideration is required for this type of information in data protection law. As greater risk to individuals is involved, so must the technical measures to protect the data against unauthorised access or loss be more robust. Covers data relating to:
    - racial or ethnic origin
    - political opinions
    - religious or philosophical beliefs
    - trade union membership
    - data concerning health
    - data concerning a person's sex life or sexual orientation
    - genetic data or biometric data

- **Criminal Convictions Data**: data about an individual's criminal convictions also requires an additional legal condition to use and these are set out in the Data Protection Act 2018.

All digital outputs created with grant funding to help people access, engage with and learn about heritage need to be available online for at least five years after the end of the project. This includes images, films, audio, documents and data.

Conditions of our grants are given on the basis that digital outputs created with grant funding are made available online, and shared under an open licence, unless specific exceptions apply.

These digital outputs also need to be shared openly with a CC BY 4.0 licence. This means the outputs will be available for others to re-use, re-publish and adapt, as long as they give the correct acknowledgement of the source. The CC BY 4.0 licence does not apply to any personal data included in the output.

Special category personal data

If your outputs include 'special category' personal data, the Heritage Fund will provide an exception, which means that you do not have to share these outputs under CC BY 4.0 licence. In the first instance, you should contact your Engagement Manager at the Heritage Fund to discuss this. Typically, this is the case where there is personal information about health, belief or ethnicity.

Personal data classed in the GDPR as 'special category' or relating to criminal convictions will require an additional legal basis or condition for processing personal data. Projects which involve this type of data are subject to an exception to the requirement to apply a CC BY 4.0 licence for re-use. If your outputs depict under 18-year-olds, or relate to vulnerable adults, you should also seek an exception from the open licence requirement.

If you believe there are good ethical reasons for not sharing your funded outputs online or under an open licence, you should contact the Heritage Fund.

You will need to ensure that you get data protection 'right' in your project by:

- making sure the use of personal information in outputs is fair and lawful
- making sure the people whose personal information is included in the outputs fully understand how their contribution will be used
- present the outputs, if possible, in ways that do not identify individuals
- allowing participants to request a takedown of the information

Further information

- For more details, see the 'Guide 2: special category and criminal convictions data' section on this page.
- A data protection law checklist is also available to download in the toolkit.

Expand All accordions

Copyright considerations

If you are creating content for a Heritage Fund project, one of the conditions is that the outputs will be given a Creative Commons CC BY 4.0 licence. This means that they will be available for others to re-use, re-publish and adapt as long as they give the correct acknowledgement of the source.

At the planning stage of your project, you should assess whether the content you are creating may not be suitable for the licence or other types of sharing. You will need to inform and agree this assessment with the Heritage Fund at the earliest opportunity.

At the beginning of a project, it is crucial that any copyright is identified as early as possible to reduce the risks of infringing any third-party copyright and to ensure that the work can be reused under the terms of a CC BY 4.0 licence.

The steps that you take will depend on:

- **Who is contributing or creating the content**. This might include employees, volunteers, contractors, and members of the public. If content is created by anyone other than employees, then the appropriate steps will be required to ensure that you have the necessary copyright permissions from them.
- **Whether there is any other content which might be in copyright** and require the necessary permissions to use. There may be possible fees associated with reuse, and these fees should also be identified as early as possible. There may also be copyright exceptions which might apply depending upon your use.

CC BY 4.0 definition

This licence enables the reuse, adaptation and sharing of content for all purposes as long as attribution is provided.

When your project formally begins, you need to ensure that you consider how your copyright obligations will be met and what products or tools you will need to ensure this. Your copyright obligations will depend on who is contributing to your project.

It will be crucial to ensure that you secure copyright permissions that enable you to make content available online and to apply a CC BY 4.0 licence from anyone contributing to the project who is not one of your employees.

Data protection and copyright templates

We have created a range of model templates for collecting the permission you will need from members of the public or other third parties. These are available for you to download from the toolkit and include:

- template permissions forms
- template deed of copyright assignment/licence (for volunteers contributing to your project)
- template separate supplier guide (for when working with contractors)

What do I need to do?

The next steps you need to take are:

- understand your role in the project (see Roles and responsibilities section in this guide)
- use the decision matrix to help you understand which of the templates you will need
- read the relevant Guides to Data Protection and Copyright
- identify which templates your project requires and customise them to your project
- read the FAQ section or seek additional support

Expand All accordions

Does CC BY 4.0 apply to my outputs?

This table summarises what you need to know regarding the sharing of digital outputs.

	Your outputs do not contain any personal data or fully anonymise the data	**Your outputs contain data relating to living individuals**	**Your outputs contain sensitive personal data relating to matters such ethnicity, health, sexuality or relate to children or vulnerable individuals**	**Your outputs contain data concerning the criminal convictions, allegations or proceedings relating to living individuals**
Will be able to give the outputs a CC BY 4.0 copyright licence or apply an exception?	**Yes**, the CC BY 4.0 licence can be added to these outputs	**Yes**, the CC BY 4.0 licence can be added to these outputs	**No**. The Heritage Fund allows an exception from the requirement for outputs with this type of data	**No**. The Heritage Fund allows an exception from the requirement for outputs with this type of data

Expand All accordions

Roles and responsibilities

A project supported by the Heritage Fund may engage a range of participants throughout its lifecycle. This section sets out the data protection responsibilities of each participant and the fundholder/ creator's obligations to them.

It also covers any organisation re-using material available under a CC BY 4.0 licence. There may be some overlap in participants, and they may have a number of data protection responsibilities.

Project role:

Grantee/project lead, or the projects nominated Data controller

Data Protection responsibilities:

- Data Controller for any personal data collected
- ensures all relevant data protection issues have been covered and documentation generated

Fundholder/fund grantee's obligations:

- adequate resources in project plan to protect and manage personal data (Privacy Notice, data minimisation, data security, contractual protections with third parties)

Obligations of organisation re-using materials under a CC BY 4.0 licence:

- correct referencing and attribution
- contact for any data protection queries

Project role:

Member of staff – Senior responsible officer (SRO)

Data Protection responsibilities:

- undertakes available data protection training
- handles personal data in accordance with the law and organisational policy

Fundholder/fund grantee’s obligations:

- managing staff data in accordance with the law and organisational policy
- provide a privacy notice, explaining how their data is collected and managed
- see 'Template: Project privacy notice'

Obligations of organisation re-using materials under a CC BY 4.0 licence:

- N/A

Project role:

Contractor

Data Protection responsibilities:

- accepts data protection obligations by signing agreed contractual terms

Fundholder/fund grantee’s obligations:

- ensuring formal contracts with data protection clauses are in place

Obligations of organisation re-using materials under a CC BY 4.0 licence:

- permission
- correct referencing and attribution

Project role:

Volunteer

Data Protection responsibilities:

- undertakes available data protection training appropriate to their access to data
- handles personal data in accordance with the law and organisational policy

Fundholder/fund grantee's obligations:

- provide a privacy notice, explaining how their data is collected and managed
- ensures appropriate guidance is given
- manages volunteer personal data in accordance with the law and organisational policy
- see 'Template: Project privacy notice'

Obligations of organisation re-using materials under a CC BY 4.0 licence:

- permission
- correct referencing and attribution

Project role:

Participant (interviewee, subject of an image, appears in a video)

Data Protection responsibilities:

- understands what data is being collected and for what purpose, including copyright and re-use
- signs relevant documentation

Fundholder/fund grantee's obligations:

- privacy Notice
- takedown policy
- manages data in the project in accordance with data protection principles and under a relevant legal basis
- see 'Template: Project privacy notice'

Obligations of organisation re-using materials under a CC BY 4.0 licence:

- permission
- attribution/referencing
- data controller responsibilities: specifically that they manage any personal data in the project in accordance with t he data protection principles and under a relevant legal basis
- organisation may need to provide privacy notice unless exemption applies

Expand All accordions

Guide 1: legal basis

If you are processing any personal data, you need to have a good reason, referred to as lawful basis.

Data protection definition: lawful basis

In data protection law there are six legal bases for processing:

- the individual has consented to the processing
- the processing is necessary for a contract to which the individual is a party

- your organisation has a legal obligation to process the data, perhaps under charity law or the National Heritage Act 1983
- your organisation needs to process data to protect the vital interests of an individual
- if your organisation is a public authority, they need to process data as part of their powers established in law
- your organisation has a legitimate interest in processing the data, balanced against the rights and freedoms of the individual

Key point: The legal basis under which you process personal data should be set out in your organisation's overarching privacy notice.

In the context of making content available online under a CC BY 4.0 licence, the following legal bases are the most suitable.

Consent

The ICO states that "genuine consent should put individuals in charge, build trust and engagement, and enhance your reputation." To make sure that consent is valid, it needs to be:

- **a clear affirmative action**: an "opt-in" rather than "opt-out"
- **fully informed**: people need to know what they are opting into, who will be storing their data and how
- **freely given**: there should be no power imbalance or implied pressure to provide the consent. The consent should be as easy to retract as it is to provide
- **must be recorded**: the organisation should retain a record of the consent

Legal basis for personal data subject to CC BY 4.0

UK GDPR Article 6 (1) (a) Consent is the most appropriate legal basis in our scenario but it will still be challenging to use. You can brief participants fully on the copyright arrangements and many will be 'on board' with the objectives of your project and the principles of open access to collections.

However, you must ensure that individuals understand how their data might be re-used beyond the boundaries of the current project. Additionally, individuals might feel compelled or obliged to give their consent to the project, which would undermine the validity of consent.

A template project consent form is available in the toolkit to download.

Necessary for a task in the public interest

If the fundholder is a public authority under Schedule 1 of the Freedom of Information Act, they can rely on UK GDPR Article 6 (1) (e), where 'processing is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the controller'.

For galleries, libraries and museums that are public authorities, creating, maintaining and providing access to the cultural resources in its collections will be fundamental to their public mission.

Legal basis for personal data subject to the terms of a CC BY 4.0 licence

Where the cultural objectives of your organisation and the Heritage Fund are met by making the material available, and obtaining valid consent is not possible, the legal basis of task in the public interest could be used.

As with legitimate interests – explained below, this is a flexible legal basis but still requires fair and lawful use of personal data. The public task need to be valid for the authority and the ‘necessity’ must be demonstrable.

Legitimate interests

One of the available legal bases for processing personal data in this scenario, where obtaining valid consent is not possible, is UK GDPR Article 6 (1) (f). This is where ‘processing is necessary for the purposes of the legitimate interests pursued by the controller or by a third party, except where such interests are overridden by the interests or fundamental rights and freedoms of the data subject which require protection of personal data’.

The legitimate interests of your organisation, such as promoting its collections or encouraging donations, always needs to be balanced against the rights and freedoms of the individuals. The less privacy intrusive the photo or video, the more the balance favours the legitimate interest.

Legitimate Interests as a legal basis for personal data subject to CC BY 4.0

This is a flexible legal basis but always relies on the balance between the interest and the rights and freedoms of the individuals whose data is at issue. As an organisation, you can work out and document the balance in a Legitimate Interests Assessment.

ICO Guidance

Safeguards around the use and presentation of data, allied with pro-active management of ‘takedown requests’ or GDPR rights requests are a key part of this legal basis.

For further information on legitimate interests as a lawful basis, visit the ICO website.

Expand All accordions

Guide 2: special category and criminal convictions data

Special category data definition

‘Special category data’ covers data relating to:

- racial or ethnic origin
- political opinions
- religious or philosophical beliefs
- trade union membership
- data concerning health
- data concerning a person’s sex life or sexual orientation
- genetic data or biometric data

In all cases, extra consideration is required for this type of information in data protection law. As greater risk to individuals is involved, so must the technical measures to protect the data against unauthorised access or loss be more robust.

Criminal convictions data definition

Data about an individual's criminal convictions also requires an additional legal condition to use and these are set out in the Data
Protection Act 2018.

Additional legal bases

As befits data with a higher risk, an additional legal basis needs to be relied upon to justify the processing of 'special category data' and data relating to criminal convictions.

There are a range of options in the GDPR, but the following are most likely to arise for cultural and heritage organisations:

- the individual has provided explicit consent for what you will do with the data
- the use of the data is necessary for carrying out your statutory obligations (such as those under health and safety, equality or employment law)
- the data may have clearly already been made public by the individual (such as the political affiliation of an MP or the criminal record of a former prisoner turned public activist)
- the use of the data may have a statutory basis (for example, where a museum may be a public authority)
- the use of the data is necessary for archiving purposes, scientific or historical research purposes or statistical purposes, whilst safeguarding the rights of the individuals involved

Special category data, criminal convictions and copyright

Special category data will not be suitable for re-use under the CC BY 4.0 licence. A fund recipient should apply for an exception from the CC BY 4.0 licence requirement.

- For further information, see the 'Guide 5: securing an exception to the default licence requirement' section on this page.

Expand All accordions

Guide 3: keeping it minimal and relevant

This section provides an overview of how to collect personal data which is minimal and relevant. The third data protection principle is that personal data should be 'adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed. This is usually called the 'data minimisation' principle.

Adding personal data to project content needs careful consideration and organisations must avoid collecting or publishing more than is necessary, which could impact on the privacy of the individual.

Data protection example: data minimisation

The London Lute Museum is working on captions for its promotional photos for its latest funded project. The photographer initially writes: 'One of our donors John with Seema (his wife) and Rachel from the collections team at the reception' but redrafts as 'Attendees at our reception'. Provision of the names would be excessive for the purpose of publishing the image.

The UK GDPR defines a number of specific approaches to protect privacy in the use of personal data. These can be adapted for project content in the following ways.

Pseudonymisation

‘Pseudonymisation’ in GDPR terms means presenting the personal data in such a manner that the personal data can no longer be linked to a specific person without the use of additional information. That additional information is kept separately and is subject to technical and organisational measures to ensure that the person is not identified. Pseudonymised data is still personal data and requires the data protection principles to be observed and a legal basis to process.

Data protection example: pseudonymisation

The London Lute Museum is publishing a range of written and audio feedback from its recent exhibition. The interviews are attributed to
coded identities, presented as “B, London” and “J, Manchester”. In its secure repository, the Museum holds the raw data with the full identity of “B, London” and other contributors, including the records of their involvement in the project, such as a signed release form and outtakes.

Anonymisation

‘Anonymisation’ in GDPR terms means managing the data in such a manner that it no longer becomes possible to link the data back to the individual and therefore ceases to be personal data and in the scope of GDPR.

Data protection example: anonymisation

The London Lute Museum has reached a year since it published the written and audio feedback from its recent exhibition. As agreed with the participants, the Museum deletes from its secure repository the raw data with the full identity of “B, London” and the records of their involvement in the project, such as a signed release form and outtakes. Any audio or written content that might contain information that would identify an individual (“I came to the exhibition because I work as a luthier at Joe’s Guitars on Denmark Street”) are edited or removed from the available content. The Museum cannot now link the data back to any of the participants.

The benefits of anonymisation and pseudonymisation

The benefits or anonymisation and pseudonymisation for cultural content can be summarised as follows:

- reduces risk and impact in the event of a data breach or other unauthorised access
- mitigates reputational risk for organisations publishing content
- helps enable re-use of data for archiving and research

Expand All accordions

Guide 4: withdrawal of consent or participation

Engaging with project participants in a fair, transparent and lawful way is essential in complying with data protection law as well as ensuring an overall ethical approach. Dealing with the possibility of a participant

wishing to remove data about them or retract their consent should be the part of any project from the planning stage onwards.

Data subject rights

Individuals have several rights under data protection law to address how their personal data is processed. These rights have specific relevance for personal information made available for public access and re-use and your organisation needs to be able to identify these rights requests and act on them, in most cases, within 30 days.

Data subject rights under data protection law include:

- **Right to be informed**. An individual should be provided a Privacy Notice informing them how data will be used.
- **Right of access** (or “Subject Access Request”, “SAR” or “DSAR”). An individual has the right to receive a copy of their personal information that your organisation holds about them and information about how you use it.
- **Right to rectification**. An individual has a right to ask your organisation to correct their personal information where it is incorrect or incomplete.
- **Right to erasure** (or “right to be forgotten”). An individual has the right to ask that their personal information be deleted in certain circumstances, such as where consent has been withdrawn, where it is no longer necessary to keep it or where it legally needs to be deleted.
- **Right to restrict processing**. An individual can restrict their data being used in certain circumstances.
- **Right to object**. An individual has the right to object to your organisation’s processing of their personal data unless you can prove legitimate interests.
- **Right to data portability**. An individual can request to transfer data to another organisation.
- **Rights in relation to automated decision making and profiling**.

Lawful bases

Whether these rights apply depends on the legal basis under which you are processing the data.

Legal or contractual obligation

In managing the project there will be a range of personal data where your organisation will have a legal or contractual obligation to retain
data and any requests for withdrawal can be refused.

Consent

If you are relying on consent as your legal basis for using data in your project, there are a few elements needed to make that consent valid. The consent needs to be:

- a clear affirmative action: an “opt-in” rather than “opt-out”
- fully informed: people need to know what they are opting into, who will be storing their data and how
- freely given: there should be no power imbalance or implied pressure to provide the consent
- must be recorded: the organisation should retain a record of the consent‘

A key element of valid consent is that the consent must be as easy to retract as it is to provide. The ICO states that “genuine consent should put individuals in charge, build trust and engagement, and enhance your reputation.”

Data protection example: invalid consent

A cathedral project staff member is approaching visitors to the cathedral on a Saturday to obtain their views on a religious figure. The member of staff conducting the survey says that everyone will be interviewed and that their name, where they travelled from and why they came will be added to the project content.

He states that if they don't want to be included, they can opt-out at the front desk by asking to arrange a meeting for the manager who is only in on weekdays. Everyone who has been coming to the museum has been doing this, he says, as he completes the interviews and leaves, preparing to add them to the document repository.

Data protection example: valid consent

The cathedral promotes its project on its website and social media accounts asking prospective participants to attend on a particular
Saturday, where it will conduct interviews. It includes the consent form and privacy notice, explaining the project and how the data will be used, on its website.

The interviewer gives each attendee who turns up on the Saturday a fact sheet explaining how the data will be used and a form to sign consenting for the information to be used. They are also available to answer any questions from participants about the project. The fact sheet includes information on how to ask for the details to be removed, which can be done with an email to the Project Team or direct message to the cathedral's Facebook page.

The Project Staff Member keeps the signed forms, and the museum stores them for the duration of the project, removing any entries from the page if the participants notify them in the interim.

Consent under data protection vs consent for participation

Obtaining consent from the participants or subjects of research is a long-established benchmark of ethical research practice. This type of
consent, whilst containing a few similar elements, does not necessarily translate into an equivalent for valid GDPR consent.

A consent form may still be a vital part of your project documentation, but it may have to reference a different legal basis for processing personal data.

Requesting removal under other legal bases

If you are processing personal data under a different legal basis, the withdrawal of agreement to involvement must be considered
differently.

Legitimate interest

There are rights in data protection law for individuals to ask for an organisation to stop processing data or ask for it to be removed. If you are relying on legitimate interests as a legal basis, you will have to balance those legitimate interests against the rights and freedoms of the individual concerned.

In a typical Heritage Fund project scenario, an opportunity to withdraw involvement whilst the project is in progress would be seen as a reasonable safeguard to balance the legal basis.

For guidance, visit the ICO website.

‘Public Task’

If your organisation is a heritage body which is also a public authority, and you are using ‘public task’ as your legal basis, then the individual’s right to erasure does not apply under data protection law. The right to object to the processing, however, does still apply. A heritage organisation would have difficulty demonstrating there were no other reasonable and less intrusive means to achieve their purpose if they could not facilitate a reasonable process to remove or withdraw content both during and after the duration of the project.

The British Library’s ‘takedown policy’ is a useful example of this.

Dealing with requests for removal

Removal during the project

A participant should, at any stage during the project, be given an opportunity to withdraw their involvement in any of the outputs. At this stage, the organisation should, in most cases, fulfil the participant’s request.

This is covered in the template project consent form provided as part of this resource.

Data protection example: take down during the project

After a painting workshop has been completed and interviews concluded, the project leader asks all the participants whether they are still happy to allow their contributions to be published as part of the project. One participant changes their mind, and their contribution is removed from the final collection.

After the project is completed

When the project is completed and the outputs have been produced and published, in either digital or hard copy, the withdrawal of consent or agreement and removal of content is, in practical terms, more difficult. An organisation should consider implementing a ‘takedown policy’ which considers these types of requests. These can be made available to participants at the start of the project to give a fuller understanding of what control they have over their data. An example is available on the British Library website.

Data protection example: take down after the project is completed

One of the participants of a project contacts the museum and asks for their interview clip and information to be removed from any available outputs of the project. The Museum agrees to take down the clip and content from the website but cannot remove the information from the initial run of published booklets that have already been published.

Archiving in the public interest

There is an exemption from the right to erasure, to object and to restrict processing where you need to retain personal data for the purposes of ‘archiving in the public interest’. This will be relevant to many Heritage Fund projects, where content may have been made permanently available. The exemption is qualified and only applies where:

- removing the information would ‘seriously impair’ the purposes, e.g., mean that the cultural resource was no longer accessible
- there are appropriate safeguards in regard to the data being archived, e.g., you have carried out data minimisation, any sensitive information has been redacted or subject to a Heritage Fund exception and you have a reasonable takedown policy or approach
- keeping the information available would cause damage and distress
- the content is not used in relation to specific decisions or interventions about the individual concerned

These safeguards should all be part of any plan to produce Heritage Fund project content.

Data protection example: archiving in the public interest

A participant in a live event has asked that all images and footage in which she is included are removed from the project outputs under the ‘right to erasure’. The museum argues that the content was designed not to be privacy intrusive (it is a group event and names or close up images of faces were not used) and that removing these photos would be detrimental to the quality of the project outputs and, therefore, the public interest of the archiving. The Museum considers that it is exempt from carrying out the right to erasure request.

Withdrawal requests when content is re-used

Where there is a CC BY 4.0 licence in place, content containing personal data could be re-used by a person or organisation unrelated to the original fundholder or the objectives of their project. The re-use of content does not exist outside of data protection law and those re-using content will have the obligations of other data controllers. They may have to comply with rights requests under data protection law and may have to rely on exemptions available to re-use in research or artistic context. The original fundholder’s responsibility is to inform participants at the start of a project about the implications of re-use. At the stage of re-use, they may be subject to a takedown or rights request to prevent any subsequent re-use.

Expand All accordions

Guide 5: securing an exception to the default licence requirement

If you are creating content for a Heritage Fund project, one of the conditions is that the outputs will be given a Creative Commons CC BY 4.0 licence, where they will available for others to re-use, re-publish and adapt as long as they give the correct acknowledgement of the source.

At the planning stage of your project, you should assess whether the content you are creating may not be suitable for the licence or other types of sharing. You will need to inform and agree this assessment with the Heritage Fund at the earliest opportunity.

What material should be subject to an exception?

Examples of materials that may not be appropriate for open licensing for ethical reasons include:

- material depicting children and young people under 18
- material depicting or created by vulnerable adults
- artefacts, knowledge or memories of cultural significance to the communities of origin
- ancestral remains, spiritual works or funerary objects

In some cases, research, data or other media produced around the above examples may also not be appropriate for open licensing.

Data protection example:

The Town Museum is creating a project where elderly residents who moved to the town from Ireland in the 1950s and 1960s talk about their experiences of work, leisure and prejudice. Because the personal data revealed in the content will reference the ethnicity of the participants, this output will be subject to a Heritage Fund exception from the CC BY 4.0 licence requirement.

Special category data qualifies for an exception to the CC BY 4.0 licence requirement, and covers:

- racial or ethnic origin
- political opinions
- religious or philosophical beliefs
- trade union membership
- data concerning health
- data concerning a person's sex life or sexual orientation
- genetic data or biometric data

Criminal convictions

Where a project collects personal data relating to criminal convictions and offences or related security measures, then this data will also qualify for an exception to the copyright licence.

Example: criminal convictions data in a project

The City Art Gallery is scoping a project where prisoners and ex-prisoners are holding art workshops on the theme of rehabilitation. One of the planned outputs is interviews with the participants, which will include a range of biographical information about their convictions and personal lives. This output will be subject to a Heritage Fund exception from the CC BY 4.0 licence requirement. Other outputs may still be suitable.

Data minimisation

Even where an exception is agreed, an organisation needs to carefully assess what data is being collected as part of a project and must avoid collecting or publishing more than is necessary, which could impact on the privacy of the individual.

Data management in the case of an exception

If content in a project is still subject to an exception from a CC BY 4.0 licence, the organisation still has legal responsibilities around the data it is processing.

Data security

The organisation is required to have 'appropriate technical measures' in place to protect the personal data it processes from unauthorised access or loss. Websites should have robust security protections such as firewalls, penetration testing and up- to-date software. Staff who are accessing personal data should be trained in data protection and IT security principles. Data collected should be stored and transferred securely.

Example: secure transfer

The Forest Friends Association sends a transcript of its interviews to the participants for them to approve as an accurate record. The Association ensures that the transcripts are sent via email using password protection, with the password provided separately to the recipient.

Data Protection Impact Assessment (DPIA)

Where you are collecting high risk data, a 'Data Protection Impact Assessment (DPIA)' is a useful tool. A DPIA maps out the data processing in a project and identify risks that you can prepare for and manage. There is a range of guidance on the Information Commissioner's website on undertaking a DPIA.

Long term storage

After the project is completed, you may wish to add your data to your permanent collection or deposit it in a formal archive. Some of the data may be subject to an embargo before it is made available to researchers.

Any third parties wishing to use the data for research purposes will be responsible for their processing of the data.

Expand All accordions

Templates and checklists

The full toolkit, which is available to download from this page under contents, contains a series of templates to help you get started on your project's data protection documentation:

- Template 1: Project privacy notice
- Template 2: Project content form
- Template 3: Notice for re-use under a CC BY 4.0 licence
- Template 4: Copyright permissions form
- Template 5: Copyright deed of assignment/licence (volunteers)

Seek support from your Data Protection Officer if you have one.

In addition to the templates, the resource includes checklists to help you meet the open licencing requirements in line with data protection:

- Checklist: Does data protection law apply to my project's digital outputs?
- Checklist: My Heritage Fund project data protection

Expand All accordions

Frequently asked questions

The toolkit includes frequently asked questions on how you can make sure your project complies with data protection law.

Each question's answer includes links to guides and templates in the toolkit to help you navigate to the relevant area of support.

To read all of the questions and answers and access the guides and templates, download the document from this page.

Online privacy and security

14/07/2020
14/07/2020
See all updates
Advice and resources to help heritage organisations keep information secure and safeguard people's privacy when working online.

Attachment	Size
Digital guide: Online privacy and security	234.98 KB
Canllaw Digidol: Preifatrwydd a diogelwch ar-lein (Fersiwn Cymraeg)	251.76 KB

About this guide

Heritage organisations find themselves working increasingly online, and the coronavirus (COVID-19) pandemic has made this more necessary than ever before. Safeguarding the privacy of people in and across the heritage sector and keeping information secure are particularly important as we adapt to new ways of working remotely.

This guide looks at some of the online activities carried out by UK heritage organisations, and addresses a range of issues they are likely to encounter. It includes checklists, practical advice and resources to help understand and manage online activity. Use this guide according to the needs of your organisation to help you, and the communities you support, stay safe.

The guide is produced by Naomi Korn Associates for The National Lottery Heritage Fund's Digital Skills for Heritage initiative. It is viewable below and can be downloaded as a PDF from this page.

Accompanying webinar

To accompany the guide's release, Naomi Korn took part in a webinar hosted by The National Lottery Heritage Fund on 16 July 2020. The speakers discuss key data security and privacy issues facing heritage organisations.

> "Digital platforms provide lifelines for keeping in touch with the communities that we support. Knowing about the issues that surround online security and privacy has never been more important"
>
> Naomi Korn

Watch this below:

Speakers

- Josie Fraser, Head of Digital Policy at The National Lottery Heritage Fund
- Naomi Korn, Managing Director at Naomi Korn Associates

Guide

Expand All accordions

Online privacy and security

Staff and volunteers working across the heritage sector support and connect with a diverse range of communities. We collect, preserve and provide access to a range of objects, buildings and spaces. We also produce information, resources and activities, including digital resources and activities that take place online. Making use of technology enables us to:

- work from home and at distance
- communicate and collaborate with co-workers and volunteers
- engage with audiences and answer questions
- keep in touch with members and patrons
- provide access to resources and buildings

Privacy and data regulations

Heritage organisations must comply with a range of legal responsibilities in this online space. Whether board member, employee or volunteer, we all have a responsibility to make sure we comply with the security, data protection and privacy policies in our organisations. These policies explain how the legal responsibilities relating to the security of personal data and acceptable online behaviour are managed. The Data Protection Act 2018 incorporating the General Data Protection Regulation (GDPR) provides the framework for these responsibilities and duties and is commonly referred to as ‘data protection legislation’.

There may be other recognised UK or international standards that organisations choose to adopt and comply with in their internal policies, eg the SPECTRUM collection management standard for museums.

Whatever the size of your organisation, everyone must respect others’ personal information and keep it secure. Each organisation should set out their approach in their Privacy Notice, which is a key requirement of the data protection legislation. It is the publicly facing statement that explains how the organisation protects personal data and takes its responsibilities seriously. Personal data is any information that by itself or when combined with other information can identify a living person. As well as the obvious email address or name, this can be a CCTV image, car number plate or reference number that links to an account or mailing list.

Some information is regarded as particularly sensitive and has additional security requirements for its handling if it is collected:

- ethnicity
- religion
- medical history
- sexuality
- political views

The risk of non-compliance if such data is lost, stolen or misused, either by accident or deliberately, means reputational risk for your organisation and the potential for sanctions or fines.

- This guide from The Association of Independent Museums (AIM) summarises how museums can manage privacy and data regulations. It will be relevant to most heritage organisations.
- Understanding what is meant by ‘data’ can be complex. Through flowcharts and simple stages the Information Commissioner’s Office (ICO) has provided a detailed guide.

> *"Although data protection laws don’t apply to people who are no longer alive, there will still be a surprising amount of personal data in your collections management system and you need to keep it safe. Being aware of what personal data you do hold – cybersecurity, password protection and so on – are all crucial."*
>
> *Gordon McKenna, Standards Manager, Collections Trust*

Managing online security and privacy

Keeping staff, volunteers, and communities – including children, young people and the vulnerable – safe in both physical and online spaces is important to all heritage organisations. In digital spaces, safety can be maintained through effective management of online security and privacy.

As employees and volunteers responsible for collecting personal data, you need to know how to record what you collect, where it is held and how to keep it safe both online and offline. Holding onto informal paper lists of rotas or contact numbers for volunteers needs to be treated with the same care as a formal spreadsheet because each risks breaching personal privacy if left unattended or mislaid. This guide provides pointers so you can be confident that you hold the information only for as long as it is needed and then delete it at the right time. Each organisation needs to have clear processes in place to help employees and volunteers know what to do.

Managing online privacy and security well is also important because trust matters. The reputation of heritage organisations depends upon those we work with having confidence that we take our legal and professional responsibilities seriously.

> *“Protecting privacy online is crucial. Not only does it ensure individuals who engage with organisations have their rights respected and their information secured from unauthorised access and exploitation, it also protects the organisations themselves. No one will want to engage with an institution that is careless with their information.”*
>
> *Jon Card, Executive Director, Collections and Governance and Data Protection Officer, Imperial War Museums*

Useful resources

- Helpful guidance on the basic principles of data protection compliance from the ICO
- The National Cyber Security Centre (NCSC) advice on online safety and security

Expand All accordions

Home and remote working

The shift to homeworking due to coronavirus (COVID-19) has accelerated the use of online tools and services by all of us. As well as devices and software that might be provided by your heritage organisation, many of us are using our own personal devices including computers, tablets and mobile phones. We might also use free and low cost web-based services for work we carry out for heritage organisations or projects, including:

- video conferencing
- email
- online storage
- collaboration tools
- social media platforms

> *"Using digital platforms to engage our audiences during lockdown has been critical to us. We use it as a way of sharing the collection, highlighting how the collection can shed light on the many issues society is grappling with today and carrying out contemporary collecting. Our increased reliance on digital as a means of keeping in touch with local and worldwide communities has also led us to a better understanding of issues around online security and privacy."*
>
> *Kylea Little, Keeper of History, Tyne & Wear Archives & Museums*

Keeping equipment safe

Keep a record of what devices are being used by all staff and volunteers working for your organisation, including the make of the device, model numbers and unique organisational codes. For assets belonging to the organisation, this information will help you trace your devices in case they are lost or stolen and identify any devices that require updates and extra software to protect against any potential cyber security issues.

Where personal devices are being used either in the workplace or for home working, ensure that the same security standards are being followed so that the organisation's data is not at risk. Any details captured about the use of personal devices should only be used for this purpose, and deleted when the business need no longer exists.

- Ten steps for better network security from the NCSC
- The ICO has useful guidance on your legal requirements and next steps when working from a personal device.

Software and apps

Software and apps should be updated regularly on all devices used for work purposes, whether they belong to the organisation or are personally owned by you. This will help ensure any sensitive data remains secure. Software companies will update programmes when security issues are discovered, to keep them secure. While some software will update automatically, you might get notifications on your device to manually update – for example, a notice that tells you an update is available for a specific app. Some software may not provide prompts. It's good practice to know what you have installed on your device and routinely check for updates.

The NCSC has tips on keeping software up to date and securing your devices.

Firewalls

A firewall is a security system that prevents unauthorised access to a private network connected to the internet. A hardware firewall can help to protect groups of computers in a network, and software firewalls can protect individual devices. If you are using a device for managing or accessing information for work, you should install a firewall.

Further information about firewalls from Get Safe Online

Acceptable Use Policy

Heritage organisations that provide IT equipment and systems should have an Acceptable Use Policy – a statement about how you use the equipment and clear rules about how your organisation's network, website or system can or can't be used, including Wi-Fi.

See the ICO's helpful overview for organisations about IT security, including a handy checklist of requirements.

Keeping data secure

You should only collect data that you need for your work, and you should ensure that you know what is being collected and how it will be used, as set out in your organisation's Privacy Notice.

If personal data is collected for work purposes, in order to comply with the data protection legislation, you need to know:

- what personal data you are collecting and why
- where you are storing it
- how you are protecting the data and for how long

Data protection legislation requires you to retain personal data only for as long as it is needed. This will depend on a number of factors, including the purpose of the data and any legal requirements there are relating to the length of time specific types of data must be kept. For example, financial regulations require pension-related data to be kept for as long as an employee is alive, regardless of whether they are still working for your organisation.

Some personal data collected might have a very limited use, such as information relating to participants who are attending a specific event. In this case, without additional permissions to contact participants in future, you would need to delete this data after the event once the business need had completed.

The ICO provides guidance on how long personal data should be kept

Data breaches

A data breach occurs when personal data is lost, compromised or stolen, whether deliberately or by accident. Under data protection legislation, there is a duty to inform the ICO of a breach **within 72 hours of becoming aware of the breach** if personal data held by your organisation is affected and the subject concerned is potentially affected.

See the ICO's information about personal data breaches, including checklists for preparing for and responding to a breach.

Back up your data

You can guard against unintended or accidental loss of data by keeping an additional copy, or back-up, of data. There are a number of ways that you can do this. Some services will provide automatic back-ups for you. You should always make sure that you have an appropriate back-up in place. Some data you collect might be irreplaceable – for example oral history interviews. Other kinds of data might be prohibitively expensive or time-consuming to replace. The NCSC has a guide to backing up your data.

Work safely with data

- Ensure that people who don't have permission to view confidential, commercial, personal or other sensitive data aren't able to look at this when you are viewing it on your screen.
- Always close your screen if you are away from your computer.
- Make use of security features like password or PIN code protection.
- Set an automatic session time-out on your device.
- Manually log out of sessions if leaving your device unattended or when you leave a shared computer.

Phishing

Phishing attacks are designed to trick individuals into providing access to data or providing information directly. Typically, these will be in the form of emails which ask you to click on links or open files (which allow scammers to install malware on your device), or ask you to provide information like passwords or banking details. Attacks may have a big impact on organisations and constitute serious security breaches, so you should always be careful. See the NCSC's guidance on dealing with phishing.

- Never click on unfamiliar or suspicious links in emails, and check to see if emails are really from who they say they are. You can do this by right-clicking or hovering over an email address. See the NCSC's guidance on dealing with suspicious emails.
- If you think you have been the subject of a phishing attack which might have compromised the personal data that you hold for your organisation, follow the steps outlined by the ICO as soon as possible.

Passwords

Reduce the risk of unauthorised access (being 'hacked') and keep your data safe by avoiding predictable passwords and always changing default passwords.

If you have trouble remembering multiple passwords, don't write them down! Use a password manager instead. These applications can generate unique, complex, easily changed passwords for all online accounts and the secure encrypted storage of those passwords.

The NCSC provides advice on using strong passwords and password managers.

Mailing lists and newsletter sign-ups

Online mailing lists and digital newsletters are an efficient way for heritage organisations to stay connected with their communities. People must give consent for you to collect their personal data, including names and email addresses, and agree to you holding their data for that purpose. You cannot use their data for any other purpose or share that data with others even within your own organisation. People should also be able to easily

withdraw their consent, or unsubscribe, at any point. This data must only be held for as long as it is required.

The ICO provides guidance on using marketing lists and the use of cookies.

Home and remote working checklist

1. Do you know how to keep your software and systems updated?
2. Do you know how to keep your devices and the personal data you are accessing secure?
3. Are you using secure passwords?
4. Do you check before opening emails from unfamiliar contacts?
5. Do you know what personal data you are storing, why, where and for how long?
6. Can you identify and do you know how to respond to a data breach?
7. Are you keeping updated about your online security and privacy responsibilities and communicating this to people you work with and support?
8. Have you sought consent from your users to mailing lists and newsletters?
9. Can users unsubscribe from your mailing lists and newsletters easily?

Useful resources

- Learn My Way, by the Good Things Foundation includes entry-level courses on keeping your device safe and keeping safe online.
- ICO helpline for further assistance regarding privacy
- ICO practical guide to online security
- This NCSC test will help you understand whether your small- or medium-sized organisation has the basic security it needs in place.
- This guide for keeping children and young people safe online by Childnet International for The National Lottery Heritage Fund covers a range of issues that affect everyone.
- CILIP and the Carnegie Trust's guide for public libraries in managing data privacy has useful pointers also applicable to heritage organisations.

Expand All accordions

Using public Wi-Fi safely

Wi-Fi refers to a group of technologies that allow multiple users to access the internet and networks wirelessly. You may use a private Wi-Fi connection at home, or a private connection at work that can only be accessed by members of your organisation. Public Wi-Fi refers to a network connection that is available for anyone to connect to, either with or without a password, typically available in public places like restaurants, shops and airports.

Take care when sharing your home Wi-Fi password

Your network connection could be misused by those gaining unauthorised access to your systems and data, or those who may use your Wi-Fi for illegal activities such as downloading inappropriate or illegal content.

People using guest Wi-Fi should have to agree to an Acceptable Use Policy (AUP)

An AUP sets out what users can and can't do while using your network so that their activity doesn't compromise your organisation's online security. This can be a simple click to understand the requirements

but it puts them on notice about acceptable use. Some larger organisations will have filters that provide alerts about inappropriate use.

Always treat public Wi-Fi as being less secure than private networks

Services that don't require registration or passwords should be avoided and regarded as insecure.

Tips for using public Wi-Fi safely:

- Use a computer with a firewall and up to date anti-virus software to protect your computer and its data. This guidance from NCSC explains what anti-virus software is.
- Avoid sending confidential emails, for example those including personal or sensitive data, until you can connect to a more secure system.
- Limit file sharing.
- Encrypt files that contain confidential, personal or sensitive data.
- Limit inputting financial or personal information via any websites unless you are sure that the websites that you visit are secure. This will be indicated by a padlock sign in the web address of all the pages of websites that you visit.

Expand All accordions

Online video conferencing

Using video conferencing platforms has become part of the daily routine for many people having to work from home. Popular services include Zoom, Face Time, Microsoft Teams, and GoToMeeting. These platforms can be used to host formal or informal meetings, webinars, interviews, teaching sessions or events.

> *"With over 100 heritage sites and five offices some staff were spending hours on the road each week. Video conferencing means we can meet colleagues from all over Scotland without the need to travel. This has made the organisation more productive as well as reducing our carbon footprint."*
>
> *Susanna Hillhouse, Head of Collections Services, National Trust for Scotland*

Many heritage organisations are now routinely making use of video conferencing. In December 2019, Zoom had 10 million users and Microsoft Teams had 32 million users worldwide. By the beginning of May 2020, due to the lockdown made necessary by the pandemic and the shift to homeworking, Zoom estimated that it had 300 million participant users daily and Microsoft Teams had 75 million active users globally. For many of us, video conferencing has become something we use regularly to stay in touch with friends and family and to work. Video conferencing platforms enable us to collaborate in real time and share files.

> *"Video conferencing has been an essential tool in the archivist's kit during lockdown – allowing us to continue to train, hone our skills, and keep in touch with our organisations and volunteers, as well as answer queries. However, as information professionals, this incredible usefulness must be balanced against a high regard for*

GDPR compliance and data security."

Faye McLeod, Archivist and Records Manager

Potential risks of video conferencing

Without using sensible security built into the platforms, video conference meetings have the potential to be hijacked by individuals or groups of people. This is sometimes called 'Zoom bombing', after one of the most popular platforms. People planning to disrupt sessions may have signed up to attend the event and appear to be legitimate participants. Attacks may include sharing inappropriate or illegal content, or showing images or video in the participant window. Collaborative tools may be misused - for example, using a whiteboard or annotating slides to draw offensive text or pictures. Flooding chat spaces by copying and pasting offensive or illegal text is also a common tactic. Audio can be used to broadcast loud noises or obscene comments. This is rare and should not deter from the benefits that video conferencing has to offer.

Choosing a video conferencing platform

- If your organisation doesn't provide a specific video conferencing platform, you will need to decide which service works best for you. Read the platform's terms and conditions before you decide and look at user or community reviews.
- Make sure that you understand how the content and/or data you post on the platform will be used, stored and shared. You can find this information in the service terms and conditions – all services should have a privacy policy.
- Find out how recordings and data, including chat facility content, will be kept secure and what procedures the platform has in place to tell you about any data breaches.
- You can also find comparisons of video hosting platforms security and privacy features online. These tend to date very quickly as services are updated constantly, so be sure to check the date of the comparisons. Check that the comparison comes from an objective third party.
- Your organisation might have policies that restrict or determine the platform you use, or privacy rules that can help you decide.

Collecting participant data

If you are hosting a meeting or activity that is open to the public, ask people to sign up in advance and register. This will enable you to provide any information about the meeting, and get agreement for expected behaviour and consent for any recording taking place. You can choose to provide individual log-in links to the webinar or meeting for additional security.

Remember, as with all personal data you must only keep names, email addresses and job titles for the purposes of the meeting, and it must be deleted after the meeting. You must obtain permission from attendees to hold their data for any other purpose, eg alerts to similar events.

Before your meeting starts

Friendly space policies

Many organisations have friendly space policies or codes of conduct that they ask people to agree to before attending in-person and online events. These make sure people are clear about the kinds of behaviours that are expected from participants, and what the consequences of not adhering to community standards are. It's good to ask participants to read these before meetings, and state that attendance is taken as a sign that the

participant agrees to these.

Codes of conduct are a way that organisations can demonstrate that they value the participation of all members of their community, ensuring everyone feels welcome. If possible you should develop your code in consultation with your community.

- The Wikimedia Foundation have shared their implementation steps and some sample agreements.
- Some dos and don’ts of online behaviour from Childnet
- An example of a code of conduct for online events (NSCS)

Recording meetings

Are you planning on recording the meeting, or saving the text chat from the meeting, or both?

For example, will the text chat be captured by the video, or will you save it as a text file? If so, you will need to seek consent from participants in advance and remind them during the meeting. They will also see the recording sign on the screen, which will act as an alert.

Will you be live streaming the meeting via another platform such as YouTube?

Check the terms and conditions of the platform you are using and make sure that you have the consent of your participants if you are including them and/or chat facility comments. Check that use of any additional platforms doesn’t compromise the security of your main platform, or present additional security issues you need to be aware of.

Will you be posting the recording in public after the event? Will you be publishing text chat conversations that took place during the meeting?

You will need to seek permission from participants in advance.

How long are you planning on keeping a copy of the recording for the internal use of your organisation? If you post a video publicly, will you take it down at some point?

Make sure your participants are aware of this so they can provide consent, and this is set out in your internal policy about storing data.

Meeting room management tools

- Consider how you might want to manage your participants’ interactions in the online meeting. Most video conferencing platforms will let you choose whether you allow participants to use a chat facility and whether they can share their screens. The host of the meeting will be able to mute participants’ microphones and control whether participants are able to use their cameras.
- Make sure, as host, that you know how to turn off video, mute participants, delete chatroom content, and eject participants.
- Set up a password or a waiting room facility for meetings involving people from outside your organisation. Set up each meeting with a new password and share it only with participants you know are joining you.
- Using a waiting room option means that you can manually let people into the session. This gives you greater control over who is in the room, but takes more time, so isn’t always a practical option for big meetings.

- When recording any of the participants (including external speakers) and/or any of their live chat, ensure you have the appropriate consent to record them and then to broadcast or publish the broadcast. It is particularly important that you seek consent from parents or guardians of children and vulnerable adults. See the ICO guide to seeking and managing consent.

Starting your meeting

- If you have the chat facility enabled, explain to participants how to use it, who can and can't see messages they send to each other, and whether private messages can be viewed by moderators.
- Remind your participants if you are planning on recording the meeting, if you will be recording or saving any of the public chat, and what you will be doing with any recordings or copies.
- Under data protection legislation, additional requirements apply to vulnerable participants using online services or educational resources. If any members of your group are under 13 years old then additional safeguards are required to manage their personal data, including age-appropriate instructions and design and parental consent. The ICO provide information on managing children's data.
- Remind your participants about the behaviour you expect from them and highlight key requirements outlined in your code of conduct, eg not allowing others to take screenshots without permission.

During the meeting

- Having other people to help moderate and manage an online event can help things run more smoothly, and ensures that if anything goes wrong there are people on hand to spot it and deal with it quickly. If you enable chat during the meeting, make sure you have at least one other person with you to keep an eye on it.
- Any behaviour that is in breach of your code of conduct should be dealt with promptly. Where necessary, participants who breach behaviour rules should be removed from the meeting.
- If you are recording the meeting, switch off the recording functionality before and during any breaks. Remind participants after any breaks that the recording has resumed.

After the meeting

- Delete any registration data about the participants, unless you have permission from them to retain it and a clear reason to continue to hold it.
- Delete the recordings themselves when you no longer need them. If the recordings contain any content that breaches privacy (for example, images of children for which permission from parents or guardians has not been sought) or infringes copyright, or any content which is illegal, you will have to remove that section of the recording. If this is not possible, you will not be able to post the recording.

Video conferencing checklist

1. Have you read through the security and privacy statement provided by the service you are using?
2. Do you have a code of conduct in place, and know how you will share this with participants?
3. Is the host in control of the features and controls?
4. If you are going to record the session, have you got consent from meeting participants, including any speakers?
5. Do you know how all the security and privacy features work, and how to set these up prior to the meeting? For example, password protecting your session or using a waiting room.
6. Do you have a plan in place in case your event is disrupted by offensive or illegal content or conduct?
7. Have you treated any data you may have collected in line with your data protection responsibilities?

Useful resources

- NCSC guidance on video conferencing
- ICO guidance on video conferencing

Expand All accordions

Social media

Social media platforms like Facebook, Twitter and Instagram enable individuals and organisations to communicate in real time to connect and engage with communities. They can be used to host educational events and talks and for marketing and promotional activities. They can be particularly useful when access to physical heritage spaces may be restricted.

It's important to know how much personal data we post, how we stay safe online and guard against cyber crime, and how we can protect the communities we support, particularly those that include children and vulnerable adults. In this way, we can get the most from social media, but reduce the risks on criminal activity and comply with our data protection and other legal responsibilities.

The National Lottery Heritage Fund/Childnet guide to working with children and young people online includes tips on working safely in social media environments. Even if your audience is primarily adults, you should be mindful that there might be young people across all public online spaces.

> *"Using social media has been a lifeline over the last few months. It has enabled me to connect directly and personally with established users and new audiences. Social media may be a rapid form of communication but you must always think, reread and consider the audience before posting!"*
>
> *Heather Dawson, Academic Support Librarian, LSE Library*

- Make sure you understand the privacy settings of any platforms you use, as well as how to report inappropriate or illegal content. The NCSC provides information about privacy settings across the most common platforms.
- Familiarise yourself with common privacy issues, for example, sharing personal details or photographs of others without their permission. The ICO has helpful guidance with examples on the use of social media and online platforms.
- Children aged 13 and over can create their own account on most mainstream social media platforms. See Childnet's guidance about young people using social media platforms.
- Many organisations have a social media policy which provides guidelines on what employees should be aware of, and what they should avoid doing, on social media.
- The National Council for Voluntary Organisations has provided guidance on creating a social media policy.
- The ICO's own social media policy provides a good template for organisations.
- Charity Comms, the membership network for UK charity communications professionals, also has a social media policy template.

> *"Visual images of participation in our work are key to social media. We always seek permission to use images of our participants at the outset of a project so we are*

confident we don't infringe their privacy and break data protection rules"

Emma Larkinson, Operations and Development Manager, Craftspace

Further resources

- ICO information on privacy and social networking sites
- Advice on parental controls from Internet Matters

Expand All accordions

Next steps: continuing to manage risk

Keep up to date about your responsibilities regarding privacy and online security by attending regular training and awareness sessions. Introduction to cyber security: stay safe online is a free online course from OpenLearn, developed by The Open University with support from the UK Government's National Cyber Security Programme.

Know how you can work from home and stay safe online. The Prince's Responsible Business Network's at-a-glance guide links to free cyber security e-learning, home working guidance and small business resources.

Sign up to the ICO newsletter and NCSC updates for the latest information about privacy and online security.

Regularly review your digital security and privacy arrangements, specifically how and where personal and sensitive data is stored in order to effectively assess and manage security risks.

Know what to do if you suspect a data loss and need to follow security breach procedures. This will enable you to respond quickly by alerting colleagues and where necessary reporting to the ICO within the required 72 hours.

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grey Creative Commons logo

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Digital Skills for Heritage

Digital logo

The coronavirus (COVID-19) pandemic has made the need for organisations to understand and make use of digital more pressing than ever.

We are working with our partners to better meet the new and emerging needs of the heritage sector. We also want to help organisations develop the skills that will build their resilience long term.

Getting started with online learning

14/07/2020
14/07/2020
See all updates
This guide covers a range of free, easily accessible tools and resources that you can use to create innovative and engaging online learning experiences.

Attachment	Size
Digital guide getting started with online learning (PDF)	234.64 KB
Canllaw digidol: dechrau dysgu ar-lein (FERSIWN CYMRAEG) (PDF)	240.77 KB

About this guide

The heritage sector has a wealth of knowledge to share with the world. It plays a vital role in enabling people of all ages to learn about and understand the UK's fascinating and complex history. Whether visiting sites and monuments, exploring stories and exhibitions or participating in events and activities, your visitors already experience a wealth of education opportunities.

Online learning resources and activities can help bring heritage to a wider audience than ever before. This guide provides examples of commonly used technologies that can be used to support online learning. It also contains practical resources and details of expert organisations you can turn to for additional information and guidance.

The guide is produced by the Association for Learning Technology for The National Lottery Heritage Fund for our Digital Skills for Heritage initiative.

Accompanying webinar

To accompany the guide's release, the Association for Learning Technology took part in a webinar hosted by The National Lottery Heritage Fund on 30 July 2020. The speakers discuss key online learning principles, tools and resources and answer questions from heritage organisations.

> "At the heart of every venture in online learning are really the learners, that's what it's all about."
>
> Maren Deepwell, Chief Executive of the Association for Learning Technology

Watch this below:

Speakers:

- Josie Fraser, Head of Digital Policy at The National Lottery Heritage Fund
- Maren Deepwell, Chief Executive at the Association of Learning Technology
- Harriet Hall, Campaigns Project Manager at The National Lottery Heritage Fund

Guide

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Introduction

Online learning provides opportunities to make heritage education accessible to people from all walks of life. It can include:

- free digital courses that anyone can join, sometimes called Massive Open Online Courses or MOOCS
- structured activities aimed at groups of learners such as schoolchildren
- community learning and engagement, which might involve collaborative practice or ‘crowdsourcing’ resources
- self-paced online learning materials
- virtual tours and exhibitions
- blogging and social media activities, including digital storytelling and quizzes

You don’t need specialist expertise and expensive applications to create effective learning experiences. This guide provides examples of ways many commonly used technologies can be used to support online learning.

Expand All accordions

Understanding your learners

Put your learners at the heart of the process from the outset. This will enable you to design more effective, fit-for-purpose learning resources and opportunities that encourage participation and engagement with heritage.

For example, consider how you will provide ways for learners to share their own ideas or opinions and how you will support collaboration and group work.

Questions to consider:

- Do you have a specific number of participants in mind, for example, individual learners or groups? Or are you aiming to provide resources and activities for as many people as possible?
- What is your expectation of your learners’ digital skills level, such as their ability to use online tools and resources for learning?
- How will people learn from your resource or activity online? Will they learn together at a specific time (synchronous learning) or at their own pace (asynchronous learning)?
- Are your learners in an indoor setting designed for learning, like meeting rooms, classrooms or computer labs, or in indoor or outside spaces that are open to the public? At the moment, it’s likely many people will be at home.
- What kind of devices are your learners likely to have access to (for example, mobile phones, tablets or desktop computers), and how often? Do they have good network connectivity?

Additional resources

The Enhance Digital Teaching Platform from the Education & Training Foundation provides bite-sized information on understanding learners' needs including digital context and accessibility.

The free Blended Learning Essentials course from the University of Leeds and the Institute of Education provides a clear introduction and many practical tips on using digital tools.

Building a taxonomy for digital learning published by the UK's Quality Assurance Agency includes a useful section on the digital learner experience.

These slides from the UFI VocTech Trust introduce beginners to the basics of how to design for virtual learners. You can also view the recording of the accompanying webinar, along with others focusing on getting started with online learning.

The Open University's free course, Take your teaching online, introduces concepts and tools that can help you understand how to teach and learn online.

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Key concepts in online learning

"Pedagogy" is the method and practice of teaching in general, both online and in physical spaces. There are many different kinds of pedagogy. We can make our practice more effective by considering what the best methods for teaching might be for the people we are supporting.

Some of the key pedagogical approaches you could use for online learning include:

- **Collaborative learning** – a form of active learning that prompts learners to explain their ideas or their work and communicate with others, encouraging them to reflect and learn from each other.

- **Constructivism** – a form of collaborative online learning at scale. It is often the dominant approach in online courses with large numbers of learners. Constructivist learning emphasises the social construction of knowledge and really focuses on the learner, for example learning through dialogue with other learners and the teacher. It often places importance on the context of learning and encouraging collaboration.

- **Narrative-based learning** – this model can help make subjects more memorable by providing a structured learning experience in a familiar, story-based format. This helps contextualise learning and makes the content more engaging. The focus of the narrative is a problem that must be solved.

- **Resource-based learning** – a flexible structure where the learner can use a wide range of resources to develop their understanding according to their own needs. This approach helps expose learners to different perspectives and engagement with technology. It also promotes active learning.

- **Problem-based learning** – a learner-centred approach which turns the conventional teaching process on its head, supporting learning through the experience of solving an open-ended problem. This helps participants to develop problem-solving skills, collaborate and actively engage in their own learning.

- **Situated learning** – this model aims to involve learners in realistic problem-solving situations while providing guidance. An active, contextualised approach to learning.

Expand All accordions

Digital inclusion, data protection and safeguarding learners online

Digital inclusion

Inclusion is key when designing online learning.

The National Lottery Heritage Fund's Accessibility Online guide [published in summer 2020] helps organisations understand their legal obligations and create accessible digital materials.

The Disability Collaborative Network for Museums' Digital Inclusion: Standards resource list provides practical help for ensuring your online learning content is accessible.

GDPR

General Data Protection Regulation (GDPR) is the legal framework that sets guidelines for the collection and processing of personal information from individuals.

In line with these obligations it is important to consider what personal information you will collect from your participants. You must also consider how you will securely store and dispose of this information.

The National Lottery Heritage Fund's Digital guide: online privacy and security helps organisations to manage data in line with their legal obligations.

The Information Commissioner's Office has GDPR FAQS for charities and businesses.

Keeping children and young people safe online

NSPCC Learning provides Safeguarding Standards and a checklist that any organisation can use.

The National Lottery Heritage Fund's Digital guide: working with children and young people online helps organisations understand online safeguarding practice.

Expand All accordions

Modes, formats and delivery

There are many different modes and formats of delivering online learning. These can be combined to create innovative and engaging learning activities and experiences.

Think about:

- Where learning takes place. **Synchronous learning** takes place in real time, with all learners working together. **Asynchronous learning** takes place over an extended period of time, with learners working at their own pace.

- Where learning takes place. **Face-to-face learners** are located in the same physical space (for example, a classroom or resource centre). **Distance learners** work remotely from each other in different locations (for example, from home).

- How learning is structured. **Guided learning** is led by a tutor, or follows a set path. **Autonomous learning** is where people work on their own, or choose their own path through learning activities.

- How learning engages the learners. **Interactive learners** actively engage with the learning activity or content, for example through quizzes and simulations. **Didactic teaching** provides content for learners to listen to, view or read.

- If learning is formally recognised. **Formal learning** is designed to support learners in gaining formal qualifications. Informal learning, which may be self-directed, is undertaken for personal reason or benefit and may include learning from experience.

- How learning is designed. **Personalised learning** is tailored to individual learners. **Generic learning** is designed for a broad group of learners.

From bite-sized microlearning content such as short videos or animations, to longer courses that may lead to formal accreditation, the time required to complete the learning experience is important to consider.

Commonly, you might design learning in one of these formats:

- **Learning resources**. These are individual resources that cover a single topic, for example, a video, a puzzle or a worksheet. Individual resources may be used on their own or as part of a module.

- **Modules**. These are self-contained units of learning that focus on a specific topic. They usually include narrative text, resources and activities for learners to complete.

- **Courses**. Courses contain multiple modules of learning combined together, for example into online courses or courses that form part of a school or university's curriculum.

Additional resources

You can see some example learning resources created by the Cambridge University Press shared on the quiz platform Kahoot!

This course from the National Maritime Museum, Greenwich, is an example of a course that is created in partnership with a commercial digital education platform. Popular platforms in the UK include FutureLearn, EdX and Coursera. These platforms host free Massive Open Online Courses, also referred to as MOOCs, created by partner organisations including universities, museums and other public heritage bodies. Museum Next has also compiled a list of MOOCs created by museums.

Expand All accordions

Content licencing

Think about how you will licence your materials. The National Lottery Heritage Fund requires the materials it funds to be openly licenced. Open licences ensure that your learning resources can be used and reused as widely as possible, enabling them to benefit as many people as possible.

Creative Commons provides a range of introductory materials to help people understand how open licences work, including this guide to the different types of Creative Commons licence.

UK Copyright Literacy provides practical resources and help for using copyright for learning. This includes free chapters from Copyright & E-learning: A guide for practitioners by Jane Secker and Chris Morrison on:

- e-learning and copyright: background
- using digital media: video, images, sound and software
- copyright education and training

The University of Edinburgh has compiled a useful guide to Where to find Open Educational Resources that can be used to create openly licenced learning resources and activities.

Expand All accordions

Building learning communities

One of the best ways to engage learners online is to build a shared sense of community.

Learning communities are groups or networks that connect people through learning activities and interests, helping them to work together towards a common goal. Commonly used social media platforms (such as Facebook, Twitter and Instagram), and formats (including webinars, blogging and podcasts) can be used to support learning communities.

- Whose Knowledge is a worldwide project that works to centre the knowledge of marginalised communities online. It provides a resource series including this guide to building community knowledge.

Social documents

Shared or 'social' documents are a key tool for facilitating asynchronous collaborative learning online.

Microsoft Teams and Google Docs are tools that enable you to create and share learning resources and activities online so that they can be accessed from anywhere, and used and contributed to by multiple learners.

Dropbox is another free service that lets you bring your photos, documents and videos anywhere and share them easily. The Dropbox screencast and the Dropbox in Plain English video demonstrate how this works.

Blogs for learning

A blog is a website where content is regularly updated by one or more authors. Entries are generally short and informal and may include text, links, images, video and other media. Blog posts can be amplified by sharing them on social media platforms where they can reach a wide audience. Many heritage organisations already use blogs to engage with the public. Popular free blogging platforms include Wordpress, Blogger and Medium.

As an informal medium of communication, blog posts are an accessible way for learners to engage with heritage organisations. Whales in Wales from Sea Trust in Pembrokeshire is a great example of engaging audiences of all ages in informal learning. The project explores the work of the trust, sharing updates on wildlife sightings, scientific data and learning resources.

Posting regular blogposts on different subjects, or highlights from your collections, enables learners to explore new topics and develop new interests. Blogs can also be used to bring a range of voices to your learners, for example curators and heritage professionals sharing their knowledge and experience, or by sharing voices from the past.

For example:

- Stories of Scotland podcast explores some of the forgotten or misrepresented events in Scottish history. A blog is used to share information about the latest episodes and bonus content.
- Untold Lives is a blog from the British Library that shares overlooked and forgotten lives and stories from around the world in order to inspire new learning and research. The blog contains links to information and other online resources.

Social media and hashtags

Social media platforms such as Facebook, Instagram, Twitter and Pinterest can be useful tools for facilitating learning online. Explore this guide to getting started with social media for learning by Dr Sue Beckingham.

A hashtag, introduced by the number sign or hash symbol, #, is a metadata tag used on social networks such as Twitter and other microblogging services.

- For example, the hashtag #MuseumsUnlocked is a project started during the coronavirus (COVID-19) lockdown. It was originally created by @ProfDanHicks and encourages museums, archives and heritage organisations to share images and artefacts on Twitter, enabling the public to explore collections and interact with curators. This allows museums and archives to share their knowledge and encouraged the public to engage with heritage at a time when they were unable to visit physical spaces.

Before getting started, check if your organisation has an existing social media policy. If one doesn't exist or cover your planned use of social media it might be worth considering developing one. The National Education Union provides a Social Media Model Policy for Schools, which includes a useful checklist.

Podcasts and video

Podcasts and video help learners to engage with your content asynchronously.

Distributing this type of content on platforms such as YouTube, Vimeo, Apple Podcasts and Spotify, or on social media, are also effective ways to make the public aware of your content and collections.

- For example, the National Museums Scotland Panjab Connections project included the production and sharing of several films on YouTube.

Podcasts

Digital audio shared as podcasts are a quick way to create and share content. They can be recorded using equipment you already have access to like desktop/laptop computers and mobile phones.

- Creative Boom offers a step-by-step beginner's guide on how to start a podcast.
- Hannah Hethmon of Better Lemon Creative Audio provides a useful how-to guide: Super Quick DIY Podcasting for Museums & Other Nonprofits Closed by COVID-19.
- This two-week online course from FutureLearn teaches you how to plan, write and publish your own stories in podcast form.

Video

- Discover how to combine the functionality of Zoom with the benefits of YouTube in this PDF guide produced by the Arts Council and Digital Culture Network. See more Arts Council / Digital Culture Network resources.
- Learn how to make video content using a smartphone with a guide on hardware, software and distribution by the Arts Council and Digital Culture Network. See more Arts Council / Digital Culture Network resources.

Conference platforms and live streaming

Communicating via video is an important element of synchronous learning – for example, learners working together in real time.

Free online conferencing platforms such as Skype, Zoom or Google Meets support real-time video, audio, chat conversations and content sharing.

Video communication can also be useful for researchers and learning development. For example, Towards a National Collection from the Arts and Humanities Research Council switched from face-to-face workshops to using Zoom calls as a result of the coronavirus (COVID-19) lockdown. This allowed partnerships and projects to find potential collaborators.

"We got great feedback from participants who enjoyed the rapid and fun nature of this approach to networking. In just seven minutes you cut straight to the essential priorities of each partner, allowing quick and helpful decisions on future working."

Rebecca Bailey, Towards a National Collection Programme Director

Additional resources

The Digital Heritage Lab is a digital skills development programme for small and medium-sized heritage organisations in the UK. Supported by The National Lottery Heritage Fund, it provides opportunities for users to learn more about general skills in developing digital materials.

Expand All accordions

Creating learning content

Online tools can help you find, create and share resources and engaging learning content. Here are some popular tools:

Visual content

For visual content such as photos, collages or animations for social media advent calendars, “picture a day”, colouring books, etc

- Flipgrid is a free video-based platform for learning which enables you to record, share and interact with short videos.
- Flickr is an image and video hosting site where users can upload and share.

- Biteable is a free online tool that enables users to create video content quickly and easily using templates and images.
- Wakelet is a free content and curation tool that can create digital stories and newsletters and organise content from across the web.

Quizzes and polls

- Mentimeter enables you to run live polls and Q&A sessions.
- Kahoot! is a game-based learning platform used to generate multiple-choice quizzes. Kahoot! uses social learning where learners can compete against each other to answer questions, gaining extra points for quick correct answers.
- Poll Everywhere is an audience response system that enables learners to use mobile and web-enabled devices to respond to teacher-generated questions. These include open-ended and multiple-choice questions.

Presentations, ebooks and pinboards

- Padlet is a collaborative tool which creates online noticeboards, documents and webpages.
- BookCreator is an online platform for creating online learning resources and books.
- Prezi is a cloud-based presentation software. Users can collaboratively develop presentations.
- Microsoft Sway enables users to create visual presentations, documents and other communication content.
- Zeetings is a web browser-based presentation tool that can incorporate live dynamic content such as polls, voting, surveys and activity walls.

Video content

- YouTube is a video-sharing site where you can upload, share and view videos.
- Vimeo is another video sharing site. It restricts content uploads to only those created by the user.
- TikTok allows users to create short music and lip-sync videos of three to 15 seconds and short looping videos of three to 60 seconds.
- Facebook Live is an app within Facebook that allows users to instantly stream live video.
- Periscope is a live video streaming app owned by Twitter.

Audio content

- Anchor.fm is a free iPhone app that makes it easy to broadcast short audio clips to a global audience in seconds. Your listeners can talk back, sparking instant group discussions.
- AudioBoom is a public sharing audio platform. Free accounts can record up to 10 minutes per clip. You can share your clips with Twitter and Facebook.
- SoundCloud is a very popular podcasting platform. You can customise the colour of your audio player.

Good sites and services will provide user guides – be aware they can get updated quite frequently.

Expand All accordions

Evaluating your learning content

Evaluating the learning activities, resources and courses you have created will help you understand how effective they have been and how to improve them in future.

Start by thinking about what information you will need to collect, and how you will gather and analyse it.

- **What do you need to know?** For example, you can use polling tools like Mentimeter or Poll Everywhere to find out how learners rated the learning experience and if this differed depending on circumstances or demographics.
- **What tools can you use to gather the information you need?** For example, an online survey using tools like SurveyMonkey or SmartSurvey.

Additional resources

23 Things is a useful free self-directed course that introduces 23 digital tools for a variety of uses. You can also read a case study outlining how 23 Things was used for professional development.

Members of the Association for Learning Technology have also shared reviews of commonly used technologies and case studies.

Expand All accordions

Contribute to open knowledge initiatives

When resources are limited, you can create more engagement and impact by linking learning activities to existing initiatives such as open competitions, edit-a-thons or data visualisation projects.

Wiki Loves Monuments

Wiki Loves Monuments is an annual international photography competition which takes place in September. The competition brings together amateur and professional photographers to capture images of monuments and listed sites across the UK. It provides a great opportunity to learn about local sites, buildings and objects, and also share them with a global audience. Uploaded images are shared under an open licence via Wikimedia Commons.

WikiData

WikiData is a free and open knowledge database that can be read and edited by both humans and machines. Projects can upload structured data, which can then be used in learning resources. Using WikiData helps people to explore data in a visual and engaging way.

- The University of Edinburgh's WitchFinder General Project makes use of WikiData to create an accessible interactive map using the Scottish Witchcraft Database.

Edit-a-thons

An edit-a-thon (sometimes written as “editathon”) is an event where people can learn to edit Wikipedia or add content to other open knowledge projects (like Wikidata and Wikimedia Commons).

Sessions typically focus on improving and adding to knowledge on a specific topic or type of content. Wikimedia UK supports heritage organisations of all sizes. It can help projects understand and get started on working with Wikipedia and the other Wikimedia open knowledge projects.

- The Dumfries Stonecarving Project took a blended approach to learning with the aim of promoting the rich stonecarving heritage of the area. It included practical taster sessions, summer schools with local young people, an exhibition, workshops and stone-carving quests with photography groups to record examples of this heritage. Volunteers also took part in Wikipedia Edit-A-Thons for the project, where they learned how to add photographs and information to Wikipedia. By using Wikimedia Commons and Wikipedia, the project is able to share Dumfries' stone-carving traditions with a global audience, while volunteers learn about their rich local heritage and gain digital skills.
- Women in Red is a global group of editors of all gendersfocused on improving content systemic bias in the wiki movement. Their project page includes essays and resources as well as ideas and outreach activities.

Additional resources

Wikimedia provides a guide on how to run an edit-a-thon and also practical help on edit-a-thons.

Expand All accordions

Exploring online heritage learning projects

You can combine the approaches introduced in this guide to create innovative learning activities.

The Virtual Museum by the Irish Linen Centre & Lisburn Museum

The Virtual Museum was created while the museum was closed during the coronavirus (COVID-19) pandemic. It provides a wealth of educational opportunities including virtual tours and free teaching resources for all ages, including schoolchildren.

The Virtual Museum uses a range of social media and online tools to engage learners including worksheets, virtual jigsaw puzzles, craft activities and tours.

> *"The lockdown challenge for Lisburn Museum was to transfer its participatory practice to the virtual world, concentrating on a wellbeing agenda. Our ethos is person centred, building on interactions with real people, real objects in a museum context. We met this challenge by offering interactive museum services, especially the Covid 19 and Me project online. The virtual museum will continue to be developed with schools and the communities we serve."*
>
> *Alderman Michael Henderson MBE, Lisburn & Castlereagh City Council*

Digital river by 900 Voices of the Nene Valley

Learning project 900 Voices of the Nene Valley has created a digital river.

This is a great example of audio and video learning content that enables learners to explore heritage stories from people along the Nene Valley. This project invites contributions to help grow the digital river, providing opportunities for learners to collaborate and engage in a dialogue.

Augmented and Virtual Reality

Learning projects and virtual museums can also be created through the use of Augmented Reality (AR) and Virtual Reality (VR).

- AR superimposes a computer-generated image on a learner's view of the real world or object.
- VR allows learners to interact with a computer-generated simulation.

Creating these kinds of learning projects requires careful planning, and for most heritage organisations will involve working with external contractors and hiring in specialist skills and equipment.

- The Sikh Museum Initiative has created an exciting project bringing to life Sikh artefacts and relics, including swords and jewellery, through 3D technologies,
- Historic Environment Scotland has created a 3D model of Edinburgh Castle which gives the virtual visitor an immersive digital tour of the Castle and a rare opportunity to explore hidden parts of this iconic site.

Additional resources

The Enhance Digital Teaching Platform from the Education & Training Foundation provides helpful starting points for using Augmented Reality and Virtual Reality in a learning context.

The Museum as a Site and Source for Learning is a free online course from the University of Glasgow that includes designing a virtual exhibition.

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Digital Skills for Heritage

The coronavirus (COVID-19) pandemic has made the need for organisations to understand and make use of digital more pressing than ever.

We are working with our partners to better meet the new and emerging needs of the heritage sector. We also want to help organisations develop the skills that will build their resilience long term.

Working safely online with children and young people

See all updates

This online safety guide has been produced by Childnet International for The National Lottery Heritage Fund.

Attachment	Size
Working with children and young people online	276.59 KB
Working with children and young people online – Welsh language	260.5 KB

About this guide

Heritage can provide children and young people with exciting and innovative ways to unleash their imaginations and creativity. The internet is a fantastic tool for teaching and harnessing this creativity, communicating with others and sharing successes with the wider community.

As your organisation reaches out to your existing or new communities online, it is key that you have considered children's and young people's online safety – whether your organisation is youth-facing or not. All online activities carry a level of risk, and this guide will help you understand and manage this.

The guide is produced by Childnet International for The National Lottery Heritage Fund's Digital Skills for Heritage initiative. It is viewable below and can be downloaded as a PDF from this page.

Guide

Expand All accordions

Introduction

> *"We are developing online sessions, creating video content and creating online digital exhibitions to try and engage as many people as possible, including young people and children."*
>
> *Friends of Dundonald Castle SCIO*

Engaging your audiences online can make heritage more inclusive and accessible to a wider range of people, including children and young people. In this guide, we use 'children and young people' to refer to those under 18.

> *"We are a very small organisation and we've been able to embrace the use of technology and offer equally engaging programmes online as we do when we deliver in-person. As one of our work's main targets is to future proof children and give them the necessary skills to navigate an ever-changing world, this online engagement has opened up opportunities for some really exciting future programmes."*
>
> *A Little Learning*

We have heard from over 80 heritage organisations across the UK, who have demonstrated excellent and creative ways of engaging their audiences and given us effective examples of best practice when it comes to safeguarding children and young people online. Drawing from our own expertise as well as from the heritage sector, this guide will support you with:

- Understanding why online safety considerations are vital before you embark on your digital journey, whether or not you plan to engage with children and young people directly.
- Engaging in online activity that is as enjoyable and safe as possible for the communities you work with, and particularly children and young people.
- Checklists and useful resources.

> *"We are currently engaging our members (who are aged between 8-17) through digital conferencing so we can continue to provide our sessions and a structure for our members' lives. We would normally host our monthly sessions at a cafe in Leeds, so being able to connect with our members, who live across West Yorkshire, has been a huge boon for keeping the club active. We are experimenting with a range of ways to deliver interactive sessions, whilst prioritising safeguarding in a digital environment."*
>
> *Leeds Young Archaeologists Club*

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The risks

Children and young people are often at the forefront of new technologies, trying and testing platforms, tools and services before many adults. They are often leading in creating content and can be canny and imaginative producers, consumers and communicators.

However, not all children and young people have equal access, knowledge or opportunity to technology and this can often mirror and intersect with other social disadvantage. The way in which children and young people access and navigate the internet overlaps with their offline lives in significant ways – for example, whether they have access to education or support. Additionally, parents and carers have varying levels of digital confidence, knowledge and time.

It's important that we are all aware of the issues that can arise, as any child can be at risk online. We can group these risks into four key categories which can occur on any online service or platform such as social media, online games, websites, forums, livestreaming, video conferencing or blogs.

Four risk categories

Conduct

This includes:

- Giving away personal information online such as full name, address and other identifiable information.
- Posting or sharing things online that may for instance be offensive to others, or that they may regret afterwards.
- Feeling pressure or desire to 'fit in', causing young people to participate in harmful 'challenges' or send inappropriate content or images/videos of themselves.

It's important for organisations to role model good behaviour and provide children and young people with positive opportunities to interact online with others.

While we should not put the responsibility on children and young people to 'stay safe' online, they should be equipped with skills to navigate the online world safely.

Content

This includes:

- Illegal, age-inappropriate or harmful content such as pornography or violent material, self-harm and suicide content and discriminatory content eg racist, homophobic or transphobic.
- Unreliable content such as inaccurate or misleading information.

Community, youth and heritage organisations can play an important role in supporting children and young people to access safe and reliable information, and provide support and help if they access illegal or harmful content.

Contact

Children and young people can be bullied online by their peers or adults, or contacted by those who seek to abuse, exploit or harm them. This can include:

- hate speech, abusive comments and language
- being sent, or asked to do, sexually explicit activity
- being asked for financial information

Factors such as grooming, cyberbullying and wider online friendships all come under this category. Find out more on Childnet's website.

When providing opportunities for many new people to engage and meet, it’s important to provide a safe space online that has clear ground rules. It is also likely that young people will interact with people online that they don’t know offline, which needs to be managed safely.

Commercialism

Online advertising and marketing can make children and young people want certain things and they can find it difficult to recognise adverts online. This can result in inadvertent purchases and pressure.

When using online platforms such as social media sites or video-hosting platforms such as YouTube, adverts and pop-ups appear. This is relevant to deciding what platform to post your content, particularly if you are using social media advertising or using tracking and cookies on your websites.

Checklist

- How much do your staff know and understand about the risks that children and young people face online?
- Does your organisation recognise online safety as a safeguarding issue?

Useful links

- Childnet have Childnet have information and advice for professionals on a variety of topics including cyberbullying, social media, sexting, gaming and livestreaming.
- Stonewall and Childnet have created a guide on supporting LGBT children online.
- NSPCC have information on keeping children safe online.
- UK Safer Internet Centre have online safety resources, helplines for support and advice on how to get involved in positive national online safety awareness campaigns.

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Key steps for engaging communities online

Policies

It’s important for all organisations working online to have an online safety policy in place. This will help everybody to understand their role and how they can play their part in protecting children and themselves online.

Any online safety policy should sit alongside your other safeguarding policies, as well as risk assessments, to make sure that you adopt a cohesive approach. Make use of existing templates (see useful links below) and adapt and make them relevant to your organisation and the work that you do.

It is good to consult staff, volunteers and your community, particularly young people. They may highlight areas that you may not have considered, for example, additional needs they may have.

When developing policy, consider the following:

- What current policies do you have and are they sufficient to cover your online activity?
- What is acceptable language, behaviour and conduct on your online platforms by all staff, volunteers and those who you engage with?
- Do you have policies or guidelines for the platforms you are using, such as social media, video-conferencing or live events? Are these guidelines easily accessible and easy to understand?
- How do you manage consent and share information, images and videos of your community, especially children and young people?
- Who is responsible for the policy and will lead on any safeguarding or child protection decisions?
- Do your staff know how to respond if, when communicating with children through any form of online communication (ie social media, video calls, livestreaming or calls), they suspect or are told that a child could be harmed in some way?

Tips on putting policy into practice:

1. As part of induction or updates, ensure all staff and volunteers who are working online have read your online safety and safeguarding policy or guidelines.
2. Make sure everyone understands your community engagement rules for online activity, including staff, volunteers and those you work with.
3. Let staff, volunteers and your communities know where they can go for support.
4. Your policy documents should be working and living documents. Review and update when you are making significant changes to the way you work or if an issue develops. Listen to and engage your staff, volunteers and community to help you do this.
5. What is right for another project or organisation may not be right for you and there is no easy template. You know the people that you work with best, so trust your expertise and knowledge.

> *"Having a statement for the audience to read together as an oath using age appropriate language works very well. This shows that we are all invested in safeguarding the participants. The participating children also understand what is expected of them in regards their role within the session such as ‘I won’t share any details with people I have never met in real life."*
>
> *Royal Museums Greenwich*

Useful links

- See the Online Compass from charity Safety and Security Online – a self-review tool to establish your online safety provision. You can also use their online safety policy templates.
- NSPCC Learning has a checklist as well as helpful Safeguarding Standards. It can be used by any organisation that works with children and young people. They also have an online safety policy template you can adapt for your organisation.
- See Company Three's Working online risk assessment template as an example you can adapt and tailor to your own organisation.
- See the ICO's site for how to process and manage children's personal information.
- See the NSPCC's advice on what to do if a child reveals abuse.

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Key advice for staff and volunteers

Operating online is about transferring the safeguarding best practice you have offline into the virtual world, making activities safe and inclusive for everyone. This is not an exhaustive list, but here are some key considerations when engaging communities online across all platforms.

Interacting with children and young people online

Involve young people

Explain and discuss your procedures with the young people you are working with and why it's important to follow them. Give them opportunities to feed in and help you develop your policies or guidelines.

Children and young people are often given rules without being given the chance to discuss them. This can be disempowering. They will also often have many good and helpful ideas.

Personal accounts

Use only work accounts, for example on social media, and ensure staff, ambassadors and volunteers don't 'friend' or add young people to their contact lists through their personal accounts. If using services such as WhatsApp to have interactions with young people, including groups, always ensure that they are via work phone numbers and devices.

This is to protect children and young people as well as to have full transparency if any complaints or issues arise. It is also to protect both staff and those who they are engaging with, as you do not want to give away personal information.

Devices

All communication with young people should be done on an organisation's device that is password protected. In very small organisations or those without work devices, it is advisable to use platforms where someone else from your team can sign in to observe the conversation as it takes place.

It's very easy for information to be backed up and stored in other places on our personal devices, sometimes without us realising. When accessing, managing and storing young people's data we have to be careful to protect it.

One-to-one interaction

Avoid having unnecessary one-to-one contact with children and young people through any online medium. In situations where this might or does happen, make sure you have the consent of their parents or carers and they are aware of when and how long you will be engaging with them, as well as the focus of your discussion or session.

If you are emailing a child or young person, always copy in another member of your team and explain to the young person that you will do so. Often, young people may forget to ‘Reply All’ when they respond, but ensure that you keep other staff members involved.

Making sure that there is transparency and accountability for any conversations you have with young people is key.

Group discussions

If you are having online group discussions or sessions, think about who is involved, their ages, how they will interact and know each other.

It’s really important to set ground rules. Ask the young people what they think and to set them with you. Make sure that all participants know them. Not all young people will be equally as confident to speak up on a group discussion. Try to provide young people with as much information and prompt questions before the discussion as well as alternative ways they can be involved.

You might be introducing new young people to each other. How they will interact with each other is really important as they may start interacting outside of your discussions.

Working as an organisation online – accounts, devices and security

Accounts

When using a new online platform or service, make sure all your staff and volunteers are using accounts that are in your organisation’s name and set up for purely professional purposes.

Devices

Try to provide staff with devices (laptops, phones) that are for work purposes only. If this is not possible, establish clear guidelines how they will interact with others, protect organisational information, data and personal information of others.

Personal use

Organisational accounts should not be used for personal purposes, for example, using a Zoom account for personal use.

Why it's important

To protect your organisation’s reputation, the personal information of your staff and volunteers, and to ensure transparency and accountability. Furthermore, you want to be able to own any content or information that is created or shared online. To do so, the organisation needs access.

Working as an organisation online – security

Passwords

Make sure that all your accounts have strong, secure passwords using a mixture of lower and upper case letters, symbols and numbers. Change passwords regularly. Don’t share your passwords or logins with others. Make sure passwords are unique to the account or service you are using.

Many accounts get ‘hacked’ by people who guess the password. If someone accesses your account, they could access personal information or post offensive or illegal content from it.

Remote working

If staff or volunteers are working remotely, ensure that any work devices are closed when they are not using them and are password protected.

Closing or logging out of devices ensures they are locked and can’t be used by others, and that any in-built camera is not active.

Updates

Remind your staff and volunteers to update software regularly, as there may be new security updates.

Technology changes rapidly. It’s important to keep updating your software to ensure that you have the most secure version.

Useful links

- Digital Youth Work is an EU project supporting organisations to engage with young people online.
- Childnet's Using technology safely checklist.
- Password management and security guide – South West Grid for Learning.

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What do I need to know about using social media for my organisation?

Social media is a highly effective way to showcase your work and have dynamic and ongoing conversations with your audiences and communities. You could host live Q&As on Twitter, ask your audiences for reviews, or go live on Instagram Stories. It’s also a wonderful way to empower and include your audiences.

Do your research

Think about which platform and tool is best for your organisation and what you want to achieve. One social media service may be better suited for your communities than others. Think about how children and young people may engage with your social media activity, whether you are targeting them or not.

You can use social media to broadcast or promote your work – providing updates, showcasing your work or reaching new people.

You can also communicate with a group – an online group or page that shares information and stays connected. On many sites you can choose who is in these groups and limit it to specific people.

Once you've decided on the best platform, learn the safety tools and the rules. Most platforms will have a help centre.

Think about how you will moderate comments or interactions, particularly from children and young people, and if you have capacity to do so regularly. Some services such as YouTube enable you to disable comments, for example.

Establish guidelines

The content you post and share on social media, as well as your tone of voice, should reflect your activities, aims and values as an organisation.

Make sure your staff and volunteers are clear about your organisation's expectations of how they should behave online, including what they 'post', 'like', 'reshare' or 'retweet'. This is particularly crucial if you are likely to be engaging children and young people. Consider adding social media use in your staff or volunteer code of conduct or behaviour policy.

> *"We use a business page on Instagram and a page on Facebook rather than personal accounts and they are branded with our business name. We keep posts appropriate and relevant and we do not share personal information about participants."*
>
> *Just Curious Club*

Security and settings

Make sure you understand the privacy settings of any social media service you are using. Privacy settings allow you to select the audience for everything you post or share, as well as define what other apps or services can see. It is most likely that you want your organisation's account to be public, but it's important to be aware of all the options.

Your staff may post from their own phones/tablets to your social media accounts so they can post quickly, particularly on platforms such as Instagram or Snapchat. If this is the case, they should take care to logout of online accounts, especially if working remotely. Take steps to secure any organisational accounts and devices to prevent unauthorised or accidental access.

Social media and engaging children and young people

Social media apps such as Instagram, Snapchat and TikTok are incredibly popular with young people, including those of a primary age. These types of sites allow young people to be creative online, keep in touch with their friends, share photos and videos and much more. Many sites have a minimum user age of 13, although some interactive sites, such as LEGO Life and PopJam, are specifically designed for younger children.

Whether you are looking to use social media to engage directly with young people, or to broadcast to an audience that might include young people, you should be aware that most social media sites are only for those 13+, with platforms such as WhatsApp being 16+. Social media sites often have additional layers of protection for users aged between 13 and 18, including who can view their profiles and send friend requests etc.

It’s important to recognise that while many children may use social media platforms under the age of 13, they are going against the terms and conditions of the platform.

If you are actively engaging with young people under the age of 13, it is best not to use social media platforms to do so. There are alternative child friendly platforms such as YouTube Kids. Or you can use platforms such as Basecamp (for all ages) or Slack (16+ only).

Don’t forget:

- Only engage through organisational accounts, not personal ones.
- Remind the young people that what they share is on a public platform and can be seen and screenshotted by many people that they or you don’t know.
- Make sure young people know where and how they can report if they receive negative comments, are targeted or see any upsetting content.

See the reporting section in this guide to find where young people can get help.

Creating content with children and young people

You will need the child’s consent and the consent of the parent/carer in order to share children and young people’s content online, via a consent form or email exchange, for example. Make sure you build this in at the beginning of the process. Then make sure the child is happy with the final version/edit and seek consent from their parents/carers as well.

Some key points if you are sharing content involving children and young people on social media:

- Do not use the child’s surname and any other identifiable personal information.
- Children and young people’s content should only be shared through the official organisation account.
- If content created by young people is hosted on their personal social media accounts, and you don’t have their and their parents/guardian’s consent, don’t reshare/retweet.
- To showcase the work that young people have done, ask them to submit to you and, with their permission, you can share it on your organisational account.

Checklist

- Explore the platforms and services you want to use and how they will enhance the work of your organisation, as well as reporting mechanisms.
- Establish guidelines including how your organisation will use social media and communicate appropriately and safely to your audiences.
- Be mindful of age restrictions on platforms if you are trying to engage younger audiences. Most social media services are only for those 13+, with WhatsApp being 16+.
- Review and check the security and settings of the platforms you use. Do a regular check of passwords and plan how you will store and share safely.
- Set clear policies for personal use of accounts and devices and particularly for interacting with children and young people.
- Establish a clear process for obtaining consent from children and young people when sharing content on social media.
- Share content involving children and young people safely and appropriately.

> *"We send out guidance for all projects involving social media and make people aware of safeguarding resources. We monitor our social media and report accounts that are misusing our hashtags etc. We have crisis comms plans in place for difficult situations. Our Youth Panel have a social media code of practice which they jointly created."*

Kids in Museums

Useful links

- The NCVO have a helpful guide on how to choose the right social media platform for your organisation.
- Find links to social media guides at the UK Safer Internet Centre website.
- NCVO have guidelines on how to create a social media policy.
- Find more about how young people use social media and the risks.
- See Youth Link Scotland's guide for youth workers using social media.
- Read the BBC Editorial Guidelines on children and young people as contributors.

Expand All accordions

Creating and viewing content – images and videos

Taking pictures and creating short films is easier than ever before. From taking photos and films on mobiles and tablets to creating full length films, young people are creating exciting new content on a daily basis.

Whilst the spontaneity and ease allows for innovative and creative outputs, it's also really important that everyone is clear about their rights and responsibilities regarding taking images and videos.

Get active and informed consent

Make sure that your organisation is role modelling best practice when it comes to seeking active and informed consent in sharing images and videos publicly online.

Before videoing or photographing young people, or publishing or posting, ensure you are clear about your organisation's policy and that they and their parents and carers have completed relevant consent forms. If you are asking young people to submit photos or videos of themselves that they have taken, it is still essential to obtain consent and keep a record.

Children and young people also have the right to withdraw consent at any time, and it's good to have a process in place to do this if they wish.

Take and store content safely and securely

It is advisable to only use organisational devices to capture images or videos of children.

Consider where videos and images will be stored and how long for. When saving a file, ensure this is on a secure network or encrypted USB, and then deleted when no longer required.

Think about how and where to share content

Consider appropriateness of the image or video before sharing. If a photo or video that has been submitted causes concern (or is potentially illegal) follow your organisation's safeguarding policy.

It is best practice not to share the image or video with the child's full name, or other relevant personal information, in order to safeguard their welfare.

Checklist

- Do you obtain active consent from anyone you are filming or photographing, or if they are submitting content to you?
- Is there a process for how images and videos are taken, stored and kept, particularly of children and young people?
- How and where are images and videos shared? Is there particular care not to publicly share children's personal information?

Useful link

- NSPCC have a photography and filming policy statement that you can use and adapt.

Expand All accordions

Hosting live online events

From live concerts to panel discussions, many organisations host live events, workshops, webinars and Q&As. There are many benefits to holding an online event. You can open your event to many more people than could attend otherwise. You can also use the social and chat tools to keep the conversation about the event going and make it more inclusive and open.

When hosting a live event it is important to think about the safety of your audience members as well as any staff, or invited guests or artists.

Whether you want to reach a wider audience with a livestream broadcast or small audience through a webinar, or you want to prioritise audience participation, there are a wide range of platforms for different events. Which platform you choose will depend on what you want from the event, how regularly you want to host it and who your audience is.

When deciding on your platform and format, some points to consider include:

- What is the intended age of your audience? Are they allowed to be on the platform you have chosen? If your audience members are under 13, it is not advisable to use Instagram Live, for example.
- Think about whether any of your audiences will be excluded by the platform or tools used. Have you asked them if they have access?
- Provide clear and simple instructions on how to join and participate.

> *"Be confident about using new platforms, practice in advance and do 'housekeeping' – how to talk in a group/remind people how to mute and unmute, etc. Helping people to understand how to communicate online will make the meeting/online engagement less awkward and more rewarding for all."*
>
> *Amgueddfa Cymru – National Museum Wales*

Check the platform of choice

Conduct a comprehensive audit and list any potential benefits as well as risks. Areas to consider are:

- Who can get access, join the event and how?

- What is the age limit of the platform? Do users have to create an account?
- Is the event public or limited to those who register?
- Once the event is happening, who can see what?
- Can participants join the conversation? Is this via microphone or live chat? If via microphone, what muting options will be required?
- If you are enabling a live chat, can participants privately message each other? Can all participants see the conversation, or do you want to limit it?
- Who can share content or start a stream?

What your ground rules should include

Just like you may do in an offline event, make sure there are clear safety and ground rules for your event. In an offline event, you may communicate the fire exits and toilets – think about what the virtual version is.

- Do your staff have a safe and appropriate place to share live video streams from without inappropriate objects/personal information visible?
- If you are sharing your screen, are you confident that there is nothing on your screen that is inappropriate or giving information you don't want to share (for example, personal information)?
- If you are working with children or young people, think about how they will be supervised during the calls. Do you want parents and carers to remain in the room? Do you request that they take the call from a shared space, such as a living room rather than a bedroom?
- Clearly communicate what kind of language and behaviour is expected and acceptable. For example, you could gently remind parents and carers to make sure all their children and young people are appropriately dressed if they are coming on screen. You might also want to start the session reminding everyone who is on the session and to be mindful of their language, especially if small children are present.
- Be firm and clear about any sanctions if your viewers breach any of your guidelines and explain it is to protect your community.
- Your platform might allow participants to directly message a host if they have a concern. If you are hosting to a large group, you might want to draw their attention to the reporting functions of the site.
- Think about how you will manage the risk of recording and screen shots being taken. If you are recording the event then let all your viewers know.
- If the event is public where you don't know your audience members, remind your viewers that this is the case and to come to you or report to the service provider if they have any concerns about another viewer. This is particularly important if children and adults are interacting online through your event.

> *"We have faced accessibility issues with engaging participants in remote activities, such as access to a laptop or suitable Wi-Fi connection at the time of live session. To combat this, we record all sessions and send them to registered participants so that they can join in the activity at any stage during that week."*
>
> *Nerve Centre*

Ensure you have capacity to manage the event

If possible, always have at least two people managing an event – one to present and one to manage the chat room and troubleshoot. If you are using 'closed' rooms or calls on platforms such as Zoom or Skype and working with children and young people, try not to be left alone with a young person on the chat room or call.

Discuss and make sure you agree beforehand what you would do if the event was disrupted or hacked and who is responsible for taking that action and carrying it out. They might have to act very quickly. If anything

happens where illegal or very harmful content is shared, the best course of action is usually to shut the event down.

Your audiences will appreciate that you take such behaviour seriously, rather than attempt to continue. You can always follow up with your audiences and explain your actions were to keep them safe.

Live Q+As and chat are an inclusive way to engage your audiences and ensure that the event is stimulating and interesting. Make sure that you have a dedicated member of staff managing and moderating this, with administrator or moderator privileges, so they can help the questions keep on topic and flowing.

If there are users being purposefully disruptive on a public site such as Facebook Live, it may be better not to interact with them, but post messages and content so that the comments are out of view. You can also report the user to the platform or site.

> *"We remove all private chat except for private chat to the host of the session. We have three staff monitoring the session. One to lead the session and one to monitor the language in the public chat room. The third member works as a liaison between the audience and the facilitator, keeping an eye out for any concerns or opportunities to engage the participants into the session through the public chat room."*
>
> *Royal Museums Greenwich*

Admins, moderators and contributors

There is a lot of terminology when managing or hosting events and these vary across services. If you are running an event, whether it's on Instagram Live, Zoom or Google Hangouts, check the different roles and the powers you have. For example, can you:

- Block, remove or report users?
- Add or manage new people joining?
- Share screens and manage who else can do so?
- Mute participants, or even disable spoken chat?

Trial it with some colleagues or volunteers and play around with the settings before you do it for real.

Checklist

- How have you decided on your chosen platform and are you aware of the various settings and controls?
- Is there enough capacity to manage and moderate your live event safely?
- Are there ground rules for your live event and clear instructions on where your viewers can go if they have concerns or complaints?

Useful links

- Unesco have some helpful links to distance learning platforms.
- UK Safer Internet Centre advice on safe remote learning.
- Childnet have helpful advice for professionals working with young people on livestreaming and video chat and webcams. You might want to give the young people you work with some tips and help.

Expand All accordions

Reporting and responding

It’s vital that everyone in your organisation knows what to do, and is comfortable to report, if online safeguarding concerns do arise.

Where young people can get support

It’s crucial that children and young people are regularly reminded where they can get support and help. Even if what they are experiencing is not a safeguarding concern, they may still need support.

If a young person is upset about anything concerning themselves or a friend, there are some key places to go. Encourage them to speak to an adult that they trust about it.

Organisations to signpost children and young people include:

- Childline – free, anonymous support for under 19s. You can call 0800 1111 or chat online.
- The Mix – free, anonymous support for under 25s. You can call 0808 808 4994 or chat online.
- Childnet – young people aged 11-18 can find links to other helplines.
- Young Minds – provide support with mental health and wellbeing.
- Report Harmful Content – anyone aged 13+ can access Report Harmful Content to report concerns if they are unhappy with the way an online site or service has handled their report.

> *"The adults leading sessions may find themselves as one of the few trusted adults facilitating regular interactions with young people experiencing heightened anxiety or stress, or coming to terms with illness or even loss of people they know. We can’t expect our team to become counsellors overnight, but want to upskill their understanding of young people’s mental health, how to support it in practical ways, and where to signpost towards if any serious issues arise."*
>
> *Curious Minds*

Preparing you to respond effectively

If a child discloses something to a member of your staff, or if they spot an issue themselves related to the internet or use of technology, then the same reporting procedures used for any safeguarding incident offline can and should be followed. Being prepared and having appropriate policies in place will help you respond effectively.

Key questions to address include:

- Is there a clear and easy to use reporting process in place for staff that is widely known and used where appropriate?
- Are your audiences, particularly children and young people, aware of what they can do if something you are hosting or delivering online upsets or worries them in any way?
- Are reports recorded, acted upon and monitored?
- Do all your staff, volunteers and audiences know what would happen if their online behaviour went against your guidelines, and do they know where to find these guidelines?
- Does your organisation actively signpost further support to children and young people if appropriate?

Escalating a safeguarding concern

Following your safeguarding procedures, you may need to escalate your concerns to these organisations:

Grooming or other illegal behaviour

If someone is behaving suspiciously online towards a child, you should in an emergency contact the emergency services by calling 999, or otherwise make a report to the National Crime Agency's CEOP Command.

Child sexual abuse content online

This should be reported to the Internet Watch Foundation (IWF). Do not save or share this content with others as it is a criminal offence to possess or share child sexual abuse content.

Online content which incites hatred

Report this to True Vision, which tackles all forms of hate crime, including those on the grounds of race, religion, sexual orientation, disability and transgender identity.

Harmful content which is not illegal

To report this, you can get advice and support from Report Harmful Content. You can also submit a report to them if you have already made a report to an online service and are not happy with the outcome.

Terrorism

Report terrorism related content to the police's Counter Terrorism Internet Referral Unit.

Professionals Online Safety Helpline (POSH)

If you are an organisation and have an online safeguarding concern regarding a child, you can contact the Professionals Online Safety Helpline. They can support and advise you on the best course of action:

- email: helpline@saferinternet.org.uk
- telephone: 0344 3814 772

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Digital Skills for Heritage

The coronavirus (COVID-19) pandemic has made the need for organisations to understand and make use of digital more pressing than ever.

We are working with our partners to better meet the new and emerging needs of the heritage sector. We also want to help organisations develop the skills that will build their resilience long term.

Digitisation project planner, handbook and examples

24/03/2023
24/03/2023
See all updates
Use this project planner and handbook to help you develop your digitisation project idea into a comprehensive plan.

Attachment	Size
Digitisation project planner and handbook	1.07 MB
Digitisation project planner A3	616.43 KB
CYMRAEG: Llawlyfr ar gyfer cynlluniwr y prosiect digideiddio	1.05 MB
CYMRAEG: Cynlluniwr y Prosiect Digideiddio A3	614.37 KB

This resource is designed to help you:

- define your project goals
- assess what resources you have available
- identify the scope of your project and create a budget
- create a plan to find the resources you need
- make a business case or prepare a funding application

Download the planner and handbook from this page, under the contents section.

How to use the digitisation project planner

The planner will take you through the steps needed to turn your digitisation idea into a defined plan. You can use the planner to brainstorm projects of any size individually or as a group.

The planner has two parts:

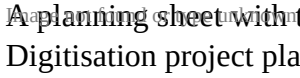
- Sheet 1 helps you set out your project vision and review the resources you already have. Once complete, you will be ready to plan out the project in more detail and identify what you will need. This sheet should take no more than two hours to complete.
- Sheet 2 helps you map out the digitisation process and determine the resources you will need to proceed. Review your answers from both sheets to make a list of action points and next steps. Completing this sheet may require additional research and brainstorming over a longer period.

The first download available from this page is the planner and handbook. This download also contains two completed examples of the planner. It is designed to be printed at A4 size.

The second download is an A3 version of the planner.

Alternatively, you can fill the planner out online using Google Sheets or download a version to complete using Microsoft Excel.

Sheet 1: Where are we now?



A planning sheet with two sections named 1 Vision and 2 Resources
Digitisation project planner sheet 1

Vision

Your vision for the project is the foundation that should inform all aspects of the work and future funding applications. Having a clear vision for your project will save you time and money down the road.

Idea

Describe your project idea in this field. Simply put, why do you want to do this project?

Project

Describe the core features of your digitisation project. List any content or activities your project will create, like digital reproductions, websites, events or toolkits. What do you want to do and when?

Materials

Describe the collections you would like to digitise and/or publish in this field. What materials are you digitising and why?

Tip: Your answers will shape the digitisation process and project costs. For example, if you need to travel to different locations, you must factor travel costs and time into your plan. You may also need to purchase portable digitisation equipment. By contrast, if you are working with an external digitisation partner, consider where the materials are and how your partner will gain access to digitise them.

Team

List the people and partners who will work with you on the project in this field. Who will you need on your team?

Tip: Describe the people on your team in as much detail as possible. Are they existing staff? New partners? Volunteers? The public? This field will help you identify what resources you will need to support your project. Any substantial contributions to the project may require a letter of support.

Audiences and users

Use this field to identify your audiences and user groups. Who will benefit from the project? How will you ensure they can access the digitised materials?

Think about specific groups within the general public. Think about:

- local community
- communities of interest
- people from or connected to a geographical area
- children and schools
- researchers
- the media

Resources

You will need team members, volunteers, partners or contractors to help with the following areas. Alternatively, you might need to re-scope your project or break it up into these different parts of the digitisation process.

Skills

List the skills you already have on your team, or in your wider network of partners, to support the delivery of your project.

Can team members or partners help with:

- project management
- rights clearance and permissions
- technical equipment and digitisation
- software and editing
- cataloguing
- data entry and management
- archiving
- website
- publication platform
- publicity and engagement

Current funds

Review the current funds you can commit to your project. Include the contributions your project partners can make to your project. Do you already have funds, and what can you do without funding?

Tip: You may have enough resources to pilot your idea by digitising a selection of materials. It is a good idea to start small and scale up later. You will gain experience and insights during the pilot which will help you save time and costs in future iterations of your project.

Sheet 2: What do we need?

Image not found or type unknown

A planning sheet with three sections named 3 Process, 4 Resources and 5 Action
Digitisation project planner sheet 2

Process

Your digitisation strategy is the heart of your project. The decision you make along each stage of the digitisation process will shape your timeline and budget.

You may not have all the answers to the questions raised in this planner, and that is okay. Record it in the 'Need' category and you can return to it later.

Permissions

Use this field to note the permissions you may need at different stages of the project. Some should be obtained before submitting the funding application. Others will arise during the project and may shape your project's timeline and budget.

Also consider whether publishing project materials online or using open licences is appropriate. For example, the materials may be culturally sensitive or third parties may own rights in them.

Tip: Have a look at the Heritage Fund's guides on open licensing, GDPR and copyright.

Digitisation

Use this field to describe how you will digitise the materials (images, sound recordings, 3D objects, etc). Identify who will carry out the digitisation, any equipment or technology required, and the quality or formats needed.

Tip: Think about your users when selecting standards, formats and image resolution. For example, what image resolution will help them make the most out of your digital collections?

Data management

Fill in this field with your data management plans. Digitisation produces a range of new materials like digital assets, metadata, datasets, workflows or other project outputs. Different data may require different approaches to data management, storage and publication.

If your project involves personal data, you will need to have a separate plan for data storage and rights management.

Consider: What information should be included in your metadata? What information will help users make the most of your digital collections? If additional funding is needed, have you read the funder's licensing requirements for project outputs Where will you store your data?

Publication and engagement

Use this field to describe where and how you will publish your project's outputs, like images, audio, video, any datasets, toolkits or other outputs. You can even publish the materials on more than one platform to improve the project's reach, like Wikimedia Commons and Flickr Pro. Also consider how you will share this information with the public, through press releases, social media or public events.

Tip: Check whether the funder has any publishing requirements. For example, the Heritage Fund requires all project outputs to be publicly accessible for between five and 20 years. Knowing this might inform which platforms you use.

Resources

Your resources (time and money) should support your project idea and digitisation plan. Make sure your timeline and budget respond to the points you have noted in the Vision and Process fields.

Timeline

Now that you have an initial project plan, you can estimate a reasonable project timeline. Break your project into phases of work with distinct milestones, start and end dates.

You will need to estimate how much time each area of the digitisation work will take. If you struggle with this, you should ask for an expert opinion and/or carry out a small pilot project. Begin by asking how much is there to do in each area of work:

- research and scoping
- audit
- digitisation
- hardware and software procurement
- training
- cataloguing and data management
- events and workshops
- final delivery

Budget

You will need to estimate costs for key expenses. Use the checklist to itemise your project costs, as well as any cash or non-cash contributions provided by your organisation or project partners. You may need to do some more research or ask suppliers for quotes to firm up your costs.

Tip: Cash contributions refer to money supplied to the project from your organisation or a project partner. Non-cash contributions include all other forms of support for the project, such as equipment, staff time, expertise, venue hire. You might also include a contingency cost between 5-10% of the total budget.

Checklist of costs

- staff and recruitment
- outsourced services
- training
- travel and expenses
- event costs
- publicity and promotion
- equipment
- software
- data storage, cloud or other subscriptions

- archiving service fees
- service fees for self-hosted archives and materials
- website costs and ongoing maintenance
- accessibility checking
- contingency
- cash contributions
- non-cash contributions

Action

Now that your digitisation project planner is almost complete, you can assess what you need to deliver the project and determine whether you will need external funding.

Needs

Use this field to make a list of any skills, contracts, equipment or other technology you will need to carry out the project.

Tip: This field can also be used to resolve some of the unanswered questions you have identified. Certain needs might impact the project's timeline or budget.

Funding

If you need additional funding to proceed with your project, make an action plan to write your proposal. This will help you write a business case for your organisation to fund the project.

If you need external funding, identify suitable funders by checking that your project fits well with any priorities and requirements they may have. As an example, review the Heritage Fund's guidance on funding and priorities.

Tip: Check the funders' deadlines and assign action points to your team to develop your funding application. Agree on your ideal submission date and work backwards to set deadlines to produce key parts of the proposal, such as the first draft of the proposal, budget, gathering letters of support from partners and so on.

One final touch…

Now that your vision has a detailed plan, give your project a name to polish it off!

Sharing this resource

The planner, handbook and examples were produced by Dr Mathilde Pavis and Dr Andrea Wallace with Sarah Saunders for The National Lottery Heritage Fund.

Please cite this resource as: 'Digitisation Project Planner'(2023) Mathilde Pavis, Andrea Wallace and Sarah Saunders, supported by The National Lottery Heritage Fund, CC BY 4.0.

Design by Andrea Wallace.

Contact the authors by email:

- Dr Andrea Wallace: A.Wallace@exeter.ac.uk
- Dr Mathilde Pavis: M.Pavis@reading.ac.uk
- Sarah Saunders: Sarah@electriclane.co.uk

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Thank you to reviewers of this guide: Francesca Farmer, Heather Forbes, Josie Fraser, Douglas McCarthy and Michael Weinberg.

Thank you to the UK cultural institutions and organisations that have published their materials using the CC BY-SA and CC BY licences and the CC0 and Public Domain tools. These images were crucial to illustrating this guide with in-practice examples of how to share materials through open licences and tools.

Doing digitisation on a budget: a guide to low-cost digital projects

28/03/2023
28/03/2023
See all updates
This guide provides an overview of low-cost heritage digitisation and shares inspiring examples.

Attachment	Size
Doing digitisation on a budget: a guide to low-cost digital projects	471.96 KB
CYMRAEG: Digideiddio ar gyllideb dynn - canllaw i brosiectau digidol isel eu cost	509.92 KB

Digital Skills for Heritage

About this guide

We hope this guide sparks creative thinking on how your own digitisation project can use or adapt strategies that have been tried and tested by others.

This guide is licensed CC BY. This means you can use it as a basis to create new resources that cover other heritage materials or digitisation techniques.

A downloadable version is available from this page.

The guide is produced by Dr Mathilde Pavis, Dr Andrea Wallace and Sarah Saunders for the The National Lottery Heritage Fund.

Defining digitisation

Digitisation is not a singular process, but a set of stages, which in turn are often part of a wider programme.

At its core, digitisation is a combination of releasing digital data about collections and creating digital representations of analogue or physical objects. This definition is by Josie Fraser, taken from the definition developed by the DCMS Digitisation Taskforce, Chaired by Valerie Johnston for The National Archives (Digitisation Taskforce Final Report forthcoming).

> At its core, digitisation is a combination of releasing digital data about collections and creating digital representations of analogue or physical objects.

This means digitisation can include making copies of physical originals in digital form, such as by scanning or photographing collections. It can also include projects that improve the quality or management of your existing digital collections, like projects focused specifically on metadata enrichment or preparing digital images or sound recordings for publication on popular platforms.

Opportunities

Low-cost digitisation can bring high returns when heritage materials are made available to a wider audience. Working with a low-to-no budget is an opportunity to think creatively about what materials you use and how to share those materials with the public. You may be surprised about how much you can do on a low budget.

Limitations

Doing a lot with a little requires setting realistic expectations. For example, low-cost digitisation may involve working with a limited range of materials or digitising with equipment you already have on hand.

You might also publish the digital assets on existing platforms instead of creating a new website. And that is fine! Sharing some of your materials with the public is better than sharing none. Plus, starting small is a great way to learn and plan for bigger digitisation projects down the road.

Examples

This guide includes real life examples of low-cost strategies you can use at different stages of digitisation.

Some examples feature institutions which may be larger or better-resourced than your project. Don't let this put you off. Instead, look at what these institutions have done, and how they have done it, to see if you could replicate something similar.

Resources

Many excellent resources are available for free to support you through each step of the digitisation process. Links to these are included below and in the following section.

Key steps to digitisation

This section provides a bird's eye view of the digitisation process organised into ten steps:

- **Step 1.** Plan your project
- **Step 2.** Clear rights to access the materials
- **Step 3.** Organise your team
- **Step 4.** Organise your equipment
- **Step 5.** Digitise the materials
- **Step 6.** Edit the digital materials
- **Step 7.** Add metadata and rights statements
- **Step 8.** Store your digital materials
- **Step 9.** Publish your digital materials
- **Step 10.** Deposit the digital materials

Step 1. Plan your project

Much of the preparation for your project can be done with no budget at all. Some questions to consider first are:

- What can we do without or before funding?
- What is the plan if we do not receive funding?

You should:

- set your project objectives

- identify the public you want to reach
- list the resources you already have (time, money, people)
- assess your needs to carry out the project

Use the Heritage Fund's digitisation project planner to prepare your project.

Step 2. Clear rights to access the materials

Your goal is to preserve heritage materials and make them accessible to the public.

If you own rights in the materials, you should plan to publish the digital materials as Creative Commons Attribution 4.0 International (CC BY 4.0), which permits any use of the materials with attribution.

If no one owns rights in the materials, use the Creative Commons CC0 1.0 Universal (CC0 1.0) Public Domain Dedication tool.

You will need to audit the materials to see whether rights in them prevent you from using CC BY or CC0. For example, you cannot use these if:

- a copyright owner hasn't given permission
- the copyright status is unknown
- the materials are sensitive or have other rights in them

You will also need to comply with data protection laws on any information that you hold and publish about living individuals.

Ask yourself: how many items are there, what rights do we have to publish the materials online and can we use CC BY or CC0 (or another rights statement)?

Divide your materials into these categories:

- no permissions needed
- permissions already given
- permissions can be sought
- unknown copyright status
- publication not possible

If you are working on a tight budget, you might start with materials for which no permissions are needed or with the most useful materials to pilot your digitisation programme.

Resources

- Digital guide: working with open licences is a comprehensive guide from the Heritage Fund.
- Rightsstatements.org provides twelve standardised labels that can be applied when Creative Commons licences cannot be used.
- Creative Commons Licences: A Guide to Data Protection & Copyright from the Heritage Fund.
- Copyrightuser.org has guidance on copyright law, including copyright exceptions for museums and galleries, libraries and archives.
- Naomi Korn & Associates has a range of resources and templates for rights management.

Step 3. Organise your team

Identify and organise your team. Will you use staff, volunteers or consultants? List your team members and allocate responsibilities. Team members may benefit from certain training. Upskilling your team can help reduce costs in the long term related to consultancy or outsourcing.

Volunteers can also play a valuable role, helping you to engage directly with your community. Working with volunteers can help reduce costs related to digitising, cataloguing and publicity. Be aware it is not always a cost-free option. Supporting volunteers with the costs of participation will enable involvement by a more diverse group.

Volunteers contribute most to projects that have:

- a tried and tested workflow
- well-documented tasks
- a well-managed team
- a clear idea of the project scope

A small investment in the above (including volunteer management and costs of participation) can bring significant benefits down the road.

Resources

- Guidance for Volunteer Cataloguing in the Archives from the National Archives has useful checklists.
- Digitization for Everybody (Dig4E) offers free online lessons on imaging, audio and video digitisation.
- Share Museum East provides free training periodically on a range of digitisation topics.
- Creative Commons runs a certificates programme for publishing heritage in open access, if you are looking for more advanced training on rights, permissions and licensing.

Step 4. Select your equipment

Decide whether you will rent or purchase the digitisation equipment that you need. What you use will depend on the heritage materials and the digitisation method (scanning, photography, sound recording), as well as the quality of the digital outputs desired and any available budget. You will need to research what equipment is available.

Budget-friendly options include:

- using what you already have, like a smartphone
- renting equipment from another organisation
- buying low-cost equipment

For images, you can use:

- a smartphone
- a document scanner
- a film scanner
- a camera, tripod and lights

For audio-visual materials, you can use:

- a smartphone

- a hand-held recorder
- a laptop or desktop computer
- a microphone connected to a recording device

Ask similar projects what they have used to digitise. Find an expert to help you select the most suitable digitisation methods and equipment for your materials (eg, professional photographer, scanners or suppliers).

Resources

- Collections Trust has a digitisation guide with a useful section on selecting equipment.
- Archivist in a Backpack has created a way to digitise heritage using only equipment which fits into a small bag.
- ScanTent is an example of an affordable portable digitisation kit that the Bibliothèque nationale de France provides for visitors to self-digitise.
- You can find buying guides on film scanners and photograph scanners online.

Step 5. Digitise the materials

Set up and digitise your materials. If you have not already, now is a good time to get advice from an expert to make sure you are working with the technical specifications suitable for your project.

Resources

- A Guide to Digitisation by SHARE Museums East.
- Capture Your Collections - Small Museum Version by Government of Canada.
- Archives and Access Toolkit by Tate.
- Digitisation Guidelines by People's Collection Wales.
- Digitise Documents by Centre for Data, Culture & Society, University of Edinburgh.
- Rijksmuseum Manual for the Photography of 3D Objects by Rijksmuseum.
- Glam3D.org is an open resource on the entire process of 3D scanning.
- Community Archives and Heritage Group has guidance for community archives.
- You can find simple guides on using smartphones to scan negatives and photos online.

Step 6. Edit the digital materials

Your digital materials now need editing. For example, you may need to do colour corrections and other adjustments for images. For new audio recordings, you may need to remove background noise or other unwanted sounds. You will need to resize, reformat or compress the assets before publishing them online.

If you are a beginner, practice editing with some of the free and user-friendly software below.

Resources

- Gimp (or XGimp for mobile phones) is one of many open source photo editing programmes.
- Photoshop Express is a free image editing programme from Adobe.
- Audacity is a popular open source software for sound editing, but you might find Ocenaudio more user-friendly.

Step 7. Add metadata and rights statements

Adding metadata to your digitised materials is the process of cataloguing. It is up to you what metadata to add.

For example, you may want to add information such as the creator, the source materials, the date of creation, the place, object or person represented, and any rights in the materials or permissions on reuse. It is a good idea to look at how other archives have catalogued their collections and take note of the standards they use.

You will need to produce a template (a list of data fields in a spreadsheet) which suits your content, your ability to populate the fields with information, and what information is useful for users. You can record your metadata in a spreadsheet using open source software like Google Sheets or standard software like Microsoft Excel. When you are ready, this information can be added to the digitised materials using free software like Adobe Bridge or during upload to certain platforms like Wikimedia Commons or Flickr Pro.

Use these simple principles to save time and money down the line:

- collect information as close to the source as possible
- you do not need to wait for your online system to be ready – most online databases or uploading software can import spreadsheet data if it is consistent and linked to a filename
- use a standard set of fields for all data entry
- be consistent in how you populate fields (for example, set a date format like DD-MM-YYYY)
- write a guide for administrators and volunteers on how to enter data
- try to separate data types into different fields where possible (for example, place and date)
- use data that will help your users find the content (for example, categories or keywords)
- record any rights and permissions on reuse (for example, CC BY 4.0, CC0 or another rights statement)

Resources on metadata

- Adobe Bridge is a free program that allows you to preview, organise and add metadata to digitised materials.
- Inselect by the Natural History Museum, London is an open source application that automates the cropping of individual specimen images from whole-drawer scans.
- Community Archives and Heritage Group has a list of recommended data fields.
- Digitisation Guidelines for People’s Collection Wales has a section on technical and descriptive metadata.
- Jisc's infokit has a general guide to metadata.
- Managing Digital Files by Centre for Data, Culture & Society, University of Edinburgh provides more guidance.

Resources on rights management and labelling

- Digital guide: working with open licences is designed to help organisations meet the Heritage Fund’s open licensing requirement.
- How-to guide for labelling cultural heritage by Europeana is useful for understanding whether you can apply Creative Commons tools or should use labels from RightStatements.org.
- Creative Commons provides a range of open licences and tools to publish original and public domain content.
- RightStatements.org provides twelve standardised labels that can be applied when Creative Commons licences cannot be used.

Step 8. Store your digital materials

Your digital materials now need backing up.

You should back up:

- archival uncompressed files (such as TIFF for images or WAV for audio recordings)
- compressed access files (such as JPEG for images or MP3 for audio recordings)
- metadata contributed to the digitised materials

Always follow the 3-2-1 rule, which says to keep:

- **3** copies of your data on
- **2** different media types (eg, a hard drive and the cloud) and
- **1** back up stored offsite

This is the first step to digital preservation for all collections. Keeping digital materials properly may incur additional costs. Some platforms offer free storage, which can help reduce costs. Consider these for the 3-2-1 rule.

Resources

- Digital Preservation Coalition offers information and training about storage and preservation of digital files.

Step 9. Publish your digital materials

Select the publication platform for your digital materials. You need to research platforms to identify the right one based on your needs and project objectives. Save time by:

- looking at what other small organisations or comparable projects have used
- speaking to other projects about their experiences with those platforms

Questions to ask when choosing an online platform:

- What are the budgetary requirements and ongoing costs for using the platform? For example, what are the storage and ongoing maintenance costs? Are they manageable for your organisation?
- Do other collections use this platform?
- Does the platform support the licence or label we want to use?
- Does the platform display your content in ways attractive to your users?
- Can you customise the look and feel?
- Is the platform easy to use for users and your team (staff, volunteers)?
- Does the platform follow web accessibility guidelines for people with disabilities?
- Can you catalogue your content online?
- Can you display your cataloguing data properly?
- Is it easy for users to search for content?
- Are there ways of grouping your content into categories to make it easy for users to find?
- Is the platform technology suitable for your users? (eg, access via a mobile phone)
- How is the data stored, backed up and recoverable?
- Is it easy to download the entire collection as backup or to place elsewhere (data portability)?
- What sort of support is accessible or provided by the platform service?

- Is the platform compatible with the rights and permissions in your materials (see Step 2)?
- Does the platform allow you to track user engagement (views, downloads)?

Resources

Examples of free or low-cost platforms to manage and publish your materials include Flickr Pro, Wikimedia Commons, GitHub, Sketchfab, Europeana and Art UK.

If you need a platform with extended functionality and have the time and interest to engage, Omeka is an open source content management system for publishing online collections. Omeka may take time to learn, but their open source training and thriving community can help. Omeka has forums, free modules and manuals, and active developer and user groups that you can turn to for support.

Many platforms provide guidance on how to upload materials to their site. Examples include:

- Uploading and sharing content on Wikipedia
- How to upload content to Flickr
- Uploading 3D models on Sketchfab
- Adding a file to a repository on GitHub and Upload your project by using GitHub best practices
- Contact Bookshare to make accessible format copies of books in your collection available to print disabled readers.

Be sure to also advertise your project widely to increase its reach and impact. Use your website and social media accounts to tell users where they can find your materials. Track and collect examples of user engagement. Some platforms record views and downloads and track where your materials are reused.

- Wikimedia has tools that record how many views your materials receive across the Wikipedia articles where they are used.
- Flickr Pro also has features and accordances that allow for tracking visitor engagement, and is a low-cost alternative if open licences cannot be used.

Step 10. Deposit the digital materials

Archive or deposit your materials in a repository to ensure the public has access beyond the life of the project. This may be a funding requirement.

How or where you archive the materials will depend on your project and the type of materials it produces. For example, if your project is web-based, the UK Web Archive aims to collect all UK websites at least once a year. Examples of archived project websites include Altogether Archaeology and Castleton Historical Society.

With digital assets, datasets or software code, open source repositories allow you to self-archive any public domain or openly-licensed materials. Museums and others, like the British Library, use GitHub.

Where costs can arise

Costs can arise in different places:

- **Labour:** staff costs, volunteer costs, recruitment, training

- **Equipment:** digitisation technology, software, or software subscriptions
- **Storage:** hard drives, cloud subscriptions, other platform fees (Flickr Pro), website domain and hosting
- **Expertise:** from consultants, suppliers, community members on project planning, collections, digitisation, data, asset and rights management
- **Engagement:** websites, publicity, public engagement, events, travel

Think about what trade-offs you can make to optimise your budget.

Example 1: Use your existing digitisation equipment, a free platform and image management software. This will free-up funds for training to upskill your team.

Example 2: Instead of buying digitisation equipment, invite visitors to photograph pre-selected works on display and upload them to Wikimedia Commons. This will free-up funds for workshops to edit Wikipedia and contribute new knowledge around your collections.

This three-part guide on costing digital projects can help you estimate what to spend on digitisation equipment, software, collections and digital asset management systems, and any training or outsourced expertise.

Low-cost digitisation ideas from real life projects

Learning from other projects can help you think creatively about digitisation on a budget. Your own project can build on strategies that have been tried-and-tested by other organisations.

A digitisation project does not need to involve 'end-to-end' digitisation. You might use materials that are already digitised and focus on one aspect of digitisation for a project, like metadata enrichment or accessibility. Another example includes preparing your digital collections for data aggregators like Europeana. These digitisation projects are important and useful in their own right.

The examples below showcase different ideas to inspire your own digitisation project. While some come from well-resourced institutions, the activities featured do not require significant funds.

Low-cost digitisation ideas

- **Idea 1.** Digitise with smartphones
- **Idea 2.** Improve your metadata
- **Idea 3.** Pilot the work with a small collection
- **Idea 4.** Use free platforms to publish materials for any reuse purpose
- **Idea 5.** Use low-cost platforms to publish materials with rights restrictions
- **Idea 6.** Collaborate with experts on your project
- **Idea 7.** Invite visitors to digitise collections on display
- **Idea 8.** Coordinate a volunteer network to digitise materials
- **Idea 9.** Digitise on demand and for a small fee

Idea 1. Digitise with smartphones

Strategy: Digitise using equipment that most people already have on hand: smartphones

Smartphones can be used to photograph both 2D and 3D heritage materials, as well as to make 3D models using photogrammetry. Some newer iPhone models even have LiDAR sensors, which enable 3D scanning.

Used by: Folger Shakespeare Library

Upon request, reference librarians use smartphones to quickly take and send people images of particular details from books. These images are then made available in the Folger Reference Image Collection under the CC0 Public Domain Dedication tool so anyone can modify, distribute and copy them without permission. The current collection has over 5,000 smartphone images.

Takeaways: Something is better than nothing

While smartphone images can be limited in quality, particularly without the use of lighting and other equipment, they can be published at a high enough resolution to make your collections accessible to more people.

Idea 2. Improve your metadata

Strategy: Clean, refine or enrich your collections metadata

You can make your digital collections more useful and accessible to users by adding information about the materials in the digital files themselves.

Start with information you already have about the materials or that you can produce without doing more research – like the date and place of creation or publication, where the materials are located, a description of persons, places or scenes represented, etc.

Used by: The National Library of Wales

The National Library of Wales converted their existing collections metadata to Wikidata, leading to an enrichment of data and easy access to tools for querying and visualising the collections. The collections selected spanned from paintings and print materials to the Peniarth Manuscripts. The Library first cleaned and refined the metadata so it could be mapped to entities in Wikidata.

The Library made their collections more easily searchable by users and generated new information about trends in the manuscripts by enhancing their metadata.

Takeaways: Working on the backend of your digital collections is worth it

Adding or enriching metadata does not require technical equipment or skills beside a basic computer and Microsoft Excel, or a programme like Adobe Bridge, but it can be time-consuming to add, sort or verify the data.

Idea 3. Pilot the work with a small collection

Strategy: Use a small collection of materials to pilot the work, develop skills and design workflows

Begin by using a small selection of materials, such as a collection that is important to your organisation's mission. Use these materials to pilot your digitisation plan and track any impact. This data can help support follow-on projects and funding applications for new digitisation projects.

Used by: The Royal Albert Memorial Museum

The Royal Albert Memorial Museum partnered with university researchers from The GLAM-E Lab to explore open access. The Museum piloted the work using a group of 63 digital reproductions of public domain paintings from the Devon South West area. These 63 digital reproductions are now available under the CC0 tool on Wikimedia Commons.

The Museum then set-up a Wikipedia category page and used an open source tool called BaGLAMa to record views and public engagement across Wikipedia. The Museum will use this information, together with other factors, to inform future work on open access and Wikipedia engagement.

Takeaways: Slow but steady wins the race

You can make the work more manageable by starting with a smaller project. You will then be able to test and refine your plans, putting your organisation in a better position to scale-up the work at a later date.

Idea 4. Use free platforms to publish materials for any reuse purpose

Strategy: Use Wikimedia Commons to publish materials that are in the public domain or openly-licensed

In general, you'll find you have more options if your materials can be published under public domain tools and open licences, like CC0 and CC BY. Wikimedia platforms enable your organisation to track public engagement and other details on reuse.

Your materials will also circulate beyond Wikimedia platforms if they are published under public domain tools and open licences.

Used by: Many institutions around the world

In the UK, the University of Exeter Special Collections uses Wikimedia Commons as their primary platform to publish CC0 materials.

Some organisations publish on Wikimedia Commons in addition to other platforms. Examples include: Aberdeen Museums and Art Galleries (CC0); Natural History Museum, London (CC BY); British Library (CC0 and others); and National Library of Scotland (CC0 and others).

Takeaways: Publishing on popular platforms will expand your project's reach and impact

While these platforms have limited functionality, meeting the public where they already are is a great way to give visibility to your collections. You can use this opportunity to redirect users to your website to learn more about your collection, project and organisation.

Idea 5. Use low-cost platforms to publish materials with rights restrictions

Strategy: Use Flickr Pro to publish in-copyright materials that you have permission to share online

If digital materials are restricted by third-party rights, low-cost services like Flickr Pro can support publication under a wider range of licences and rights statements.

Used by: Newcastle Libraries

Newcastle Libraries uses Flickr Pro to publish photographs from their collections and of events held in the libraries. This collection now includes more than 6,500 historical public domain images of Newcastle upon Tyne and the surrounding areas.

The Library regularly updates their photostream and albums with newly digitised public domain photographs, as well as openly-licensed staff photographs of the libraries, patrons or events in which rights are reserved.

Takeaways: Publishing materials with reuse restrictions is feasible and worthwhile

Making materials available online (with permission) will make your organisation and collections more visible by a wider audience even if reuse is limited.

Idea 6. Collaborate with experts on your project

Strategy: Collaborate with experts who can contribute to the digitisation project

These might include local researchers, universities or communities. Consultants can help you design your project or clear rights. A Wikipedian-In-Residence can help you prepare and upload your materials to Wikimedia platforms. Community experts also hold knowledge on the materials.

Used by: Nomad Project

Nomad collaborated with Somali communities to explore how 3D digitisation and immersive mixed reality could contextualise Somali objects with knowledge from the persons and traditions to which they belong.

Nomad hosted workshops with participants who shared oral histories and used photogrammetry to create 3D models of objects from their personal collections. The project also incorporated collections of 3D objects, photographs and audio records from the British Museum, British Library and Powell-Cotton Museum.

Takeaways: Two birds, one stone

By working with community and local experts you can reduce the costs associated with researching your materials *and* engage directly with users and stakeholders. You will need to set aside time and allocate costs to cover travel, workshops or reasonable costs to facilitate their participation.

Idea 7. Invite visitors to digitise collections on display

Strategy: Invite visitors to digitise heritage already on display

Make a scavenger list of the heritage items that you have cleared rights on and want digitised. Create a project page based on rules and guidelines used by other organisations. Advertise the event and ask visitors to bring their own digital cameras or smartphones.

Used by: Many organisations around the world

In the UK, the Victoria & Albert Museum used Wikipedia Loves Art to digitise and upload collections to Wikimedia Commons. Wikipedia Loves Art is a type of photo scavenger hunt and free content photography contest conducted in collaboration with partner museums and cultural institutions, where participants compete to take photographs aimed at best illustrating Wikipedia articles. Similar competitions include Wiki Loves Folklore, Wiki Loves Earth and Wiki Loves Monuments.

Using Wikipedia means you can create rules for users with clear guidelines on the do's and don'ts of photography, a list of artworks to capture, and what sorts of notes and tags to add during upload. Once uploaded to Wikimedia Commons, the images can be aggregated via category pages that help editors find your collections and use them across Wikipedia articles.

Takeaways: Visitors can be part of the solution

Visitor-engaged digitisation begins with onsite access to heritage that leads to increased online access for a wider public. It also gets local audiences in the door and engaging with the programmes, exhibitions and facilities offered onsite.

Idea 8. Coordinate a volunteer network to digitise materials

Strategy: Coordinate a network of volunteers to digitise materials

Volunteers can help with a number of tasks involved in the digitisation process such as sourcing or cataloguing materials, adding or enriching metadata, hosting events and running publicity for your project.

Used by: People's Collection Wales

People's Collection Wales is a Welsh Government initiative that draws together collections from heritage institutions and organisations. The bilingual project offers support and training for individuals interested in digitising collections and community projects linked to the culture and heritage of Wales.

Individuals can upload their own documents, images, videos, and sound recordings, in addition to commenting on, curating and developing narratives around content made available by others. The digital collection can be explored by theme, location, date, places and events.

The initiative prioritises the preservation of rich resources in local locations alongside more formal collections to enable, engage and transform communities, while facilitating greater global learning about Welsh history and culture.

Takeaways: Team work makes the dream work

Engaged volunteers can be of great help when you are working with large volumes of materials or metadata. But it will require time and good management skills to coordinate and train volunteers and make the most out of their contributions to your project.

Idea 9. Digitise on demand and for a small fee

Strategy: Publish what you have and use requests for new photography to fund digitisation

Publishing images of collections in the public domain without reuse restrictions can be an innovative way to pass digitisation costs off to consumers. Restructure your fee models to represent the actual costs of digitisation and data storage.

Used by: York Museums Trust and Indianapolis Museum of Art

Both museums publish digital collections to the public domain and charge only service fees for new image creation.

York Museums Trust divides its digitisation into primary and secondary photography. Primary photography includes more difficult work or specialist training; secondary photography is faster, undertaken by staff or volunteers, and intended for imaging purposes to expand online access. They've found that when a secondary image is created and becomes popular through reuse, this often spurs image requests that lead to additional asset creation.

Because the Indianapolis Museum of Art also charges only service fees, a greater number of previously undigitised works have been requested for new photography. This has increased the availability of public domain materials online and more creative reuse by users.

Takeaways: Share the costs

On-demand digitisation for a small fee can be useful to fund the digitisation of new content without having to apply for new funding. It can be a useful way to build on a pilot project. You need staff time to administer digitisation requests and the equipment or skills to digitise. What you digitise will also depend on user demand.

Additional digitisation resources

Accessibility

- 10 Accessibility Tips
- Accessibility Toolkit by BCcampus Open Education
- Accessible U by the University of Minnesota
- Guide for Increased Accessibility through 3D Models by the Swedish National Heritage Board
- Web Content Accessibility Guidelines from the Web Accessibility Initiative

Archives

- Archives and Access Toolkit by Tate
- Community-Driven Archives at the University Libraries, University of North Carolina at Chapel Hill
- Guide to Archiving Digital Records for Volunteer and Community Groups by the Digital Repository of Ireland

- Resources by Community Archives and Heritage Group

Collection and data management

- The CARE Principles for Indigenous Data Governance (Collective Benefit, Authority to Control, Responsibility, Ethics)
- The FAIR Data Principles (Findability, Accessibility, Interoperability, and Reuse)
- Guide on Digital Basic Cataloguing by the Network of European Museum Organisations
- Spectrum by Collections Trust

Guides and toolkits

- Balanced Value Impact Model by Simon Tanner
- Capture Your Collections - Small Museum Version by Government of Canada
- Digital Guides by Heritage Digital Academy
- Digitisation Guides for Science and Botanical Collections by the Distributed System of Scientific Collections (DiSSCo)
- How to Open GLAM (Galleries, Libraries, Archives and Museums) by Anne Young
- Making your digital collection easier to discover by Jisc
- Open a GLAM Lab, a collective project and resource
- Resources by Whose Knowledge?
- What does digitising collections involve? by Digital Pathways

Rights and permissions

- Copyright Notice on digital images, photographs and the internet by UK Intellectual Property Office
- Born Digital: Guidance for Donors, Dealers, and Archival Repositories by Council on Library and Information Resources

Wikimedia platforms

- Adding images to Wikimedia Commons and Wikipedia: Do’s and Don’ts by Whose Knowledge?
- GLAM Guide on Uploading Images to Wikimedia Commons by Whose Knowledge?
- How to Link to your Collections on Wikidata by ETH Library
- ALR White Paper on Wikidata by Association of Research Libraries
- GLAM Metadata Standards and Wikimedia
- GLAM Workflow for Working with WIkimedia platforms
- Persistent Identifiers and Wikidata by Biodiversity Heritage Library
- QuickStatements tool for editing Wikidata items for editing Wikidata items by Magnus Manske

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Guide authors

This guide was produced by Dr Mathilde Pavis and Dr Andrea Wallace with Sarah Saunders for the Heritage Fund.

Contact the authors by email:

- Andrea Wallace: A.Wallace@exeter.ac.uk

- Mathilde Pavis: M.Pavis@reading.ac.uk
- Sarah Saunders: Sarah@electriclane.co.uk

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