

How can the Heritage Fund be more inclusive of under-represented groups?

Findings

Summary of findings

- **The role of heritage:** the most common themes that define the role of heritage for respondents were wellbeing, social equity, community cohesion and developing skills.
- **Perception gap around the definition of heritage:** there is a perception gap between The Heritage Fund's policies, practices and what The Heritage Fund thinks it communicates, and what respondents perceive.
- **Value and perception of the mandatory inclusion outcome:** the [mandatory inclusion outcome](#) is valued but is perceived as difficult to comply with for projects that aim to engage primarily with under-represented groups around the heritage that is relevant to them.
- **Support for small organisations:** respondents identified a need to support capacity building of smaller organisations in different ways to larger organisations. Organisations led by under-represented groups are more likely to be smaller.
- **Expectations and perception of The Heritage Fund:** there were four main expectations of The Heritage Fund:
 1. supporting small organisations
 2. become a champion for marginalised communities in the heritage sector
 3. for a definition of heritage that includes wellbeing and social equity considerations
 4. advocacy and action to prove the importance of heritage
- **Identifying organisations led by under-represented groups:** The Heritage Fund's grants data quality is not of sufficient quality to enable the identification of organisations led by or with lived experience within the portfolio.

The role of heritage

Interview and survey respondents were asked: Why do you think your heritage work is important for the communities you work with, especially under-represented groups?

Findings are reported for survey and interview answers combined.

Wellbeing (mentioned by 57% of participants), associated with:

- wellbeing through sense of community
- special wellbeing approaches (eg: for people with memory loss)
- opportunities for engagement in deprived areas, access to outdoors

Community cohesion (mentioned by 32% of participants), associated with:

- sense of belonging
- pride in local heritage
- bringing people together and learning about other social groups

Social equity (mentioned by 29% of participants), associated with:

- empowerment through heritage and using the past to imagine the future
- offer a platform to discuss social issues
- being inspired by role model
- help with processing discrimination traumas

Skills, inspiration for creativity (mentioned by 16% of participants), associated with:

- discovery
- research of local heritage
- confidence building

Preserve (mentioned by 13% of participants), associated with the preservation of buildings, culture, etc.

Educate (mentioned by 10% of participants)

In the survey, about 54% of respondent strongly agreed or agreed to the statement: "The Heritage Fund truly understands the value of heritage for marginalised groups". 33% were neutral and 12% disagreed.

Expert interviews

Experts interviewed in the context of this research also highlighted the role of heritage in driving social equity and wellbeing outcomes:

- There is a growing body of evidence showing that heritage plays a role in changing perceptions and narratives.
- Heritage is power (critical heritage studies), it is never neutral, and can be used to act upon the condition of people who suffer from Co-production should be at the centre of this work (eg: Wellcome Collection).

- Research shows that heritage can enhance individuals and community's wellbeing in many ways.
- [Wellbeing and the Historic Environment](#) outlines seven ways heritage contributes to wellbeing:
 - heritage as process (volunteering)
 - participation (visiting)
 - mechanism (bringing people together for therapy/social groups)
 - healing
 - place (place shaping)
 - environment
- Planning for wellbeing outcomes can be a mechanism for diversity and inclusion by breaking down barriers of access.

Perception gap

Most respondents link The Heritage Fund's definition of heritage to the eight heritage types (see Annex 4) and not to an open definition of heritage.

We found:

- Most grantees we interviewed thought that The Heritage Fund definition includes a wide range of heritage types (eg: social history).
- For 80% of survey respondents, heritage as defined by The Heritage Fund was: "Something that falls under the eight types of heritage".
- Only 16% of survey respondents replied: "The Heritage Fund has no set definition of heritage and accepts any project that is defined by the community as 'heritage'".

Certain types of projects are not perceived as being interesting to The Heritage Fund, even though The Heritage Fund does support such projects.

This included projects:

- that are about or touch on 'sensitive' topics such as sexuality (eg: dimension of LGBT+ heritage) – staff noted that The Heritage Fund did support that kind of projects
- that are designed for one specific group or when it is too hard to engage other groups (inclusion outcome)
- that are for or led by under-represented groups but not about under-represented groups' heritage

- centred around wellbeing and with limited engagement with heritage artefacts (but some engagement with intangible heritage)

Findings from both the survey and interviews show that there is a need for more information and better communication about The Heritage Fund's funding strategy (eg: what The Heritage Fund will fund)

From the survey results:

- having case studies provided to better understand what The Heritage Fund means by heritage (54%)
- having a list of very concrete questions to answer about the heritage project, instead of having to explain what we mean by heritage (46%)
- having a clear definition of heritage provided by The Heritage Fund, so we don't have to explain what we mean by heritage and we know which project we can put forward (45%)
- nothing – I think what The Heritage Fund does now is sufficient (14.6%)

From the interview feedback:

- providing examples of projects accepted (the surprising ones) and definition of what heritage is
- including less abstract questions in the application
- being able to provide case studies instead of writing about the project in the application

Quote from a survey respondent: "I think you (The Heritage Fund) have a terrible problem with language and (buzz)words get used with different meanings in different contexts. This makes it hard for any organisation of any size to understand what the fund is actually asking."

The word 'heritage' has a wide range of connotations and more "conservative" definitions of heritage are still present, which makes it difficult for some groups to feel that The Heritage Fund is relevant to them.

We learned:

- Many respondents noticed that many community organisations tend to have a conservative definition of heritage (eg: old buildings for the enjoyment of the middle-class) and believe it is not relevant to them. Respondents tended to have a relatively open definition of heritage, but it is interesting to note that some of them discovered heritage work recently

(and what heritage means) recently or through their work with The Heritage Fund.

- At least six respondents noted that they would like The Heritage Fund to distance itself from a definition of heritage understood as “English Heritage”.
- Four interview respondents perceived The Heritage Fund contact’s understanding of heritage as more open than the one of The Heritage Fund

Heritage Fund staff might also adopt different definitions of heritage, since respondents shared that certain projects were rejected for not meeting the definition of heritage (before the inclusion outcome was introduced).

We found:

- 10% of survey respondents reported that they had been unsuccessful because of their “lack of alignment with The Heritage Fund’s objectives” in the past, and 6% because their project was not considered as heritage.

Quotes from respondents:

- “I think with the heritage fund they are very academic and very passionate but not necessarily understanding how it is for the average person. You need a level of understanding of heritage that is not average to work with. When I read the information that is how it comes across. But it got better.”
- “Before project I thought it was about old buildings - but now I realise it’s anything that informs the future of how we move forward whilst recognising history on whatever form it is.”
- “There is a lot of organisations who have a worthwhile project but that are neither art or community project that might not understand why what they do is valuable from a heritage point of view.”
- “We’re dealing with identities and self-expression: people’s understanding of themselves, why they’re marginalised, and why they should be included. I would want heritage funders to see that when we talk about heritage, we’re talking about identity, somebody’s legacy, who makes them who they are (or what gives them an understanding who they are) - immediately it broadens and it becomes inclusive.”

Value and perception of the mandatory inclusion outcome

Most respondents found the mandatory outcome useful and valuable.

We discovered:

- All the respondents interviewed recognised the value of the mandatory inclusion outcome, whether it is to keep them accountable to being inclusive or ensuring that they think about this constantly in project design and
- Most survey respondents (65%) want to keep

Survey question: Would you rather keep or remove the inclusion outcome as a mandatory requirement for your project(s)?:

- Keep it: 65%
- Depends on the project: 31%
- Remove it: 4%

Respondents share their perception of the mandatory inclusion outcome:

- 31% of survey respondents think that keeping the inclusion outcome should depend on the project.
- Some respondents noted that the mandatory inclusion outcome is not well-suited for projects that aim to engage primarily with one under-represented group (an audience that is not used to being engaged with heritage). Their perception is that the mandatory outcome requires them to engage with more than one group.
- However, staff noted that the projects engaging people from even only one under-represented group would meet the requirement for the inclusion

Support for small organisations

Respondents expressed a wide range of wishes, but the most common was around recognition of the needs of small organisations.

Respondents want The Heritage Fund to:

- Provide core and long-term funding instead of project-based to enable small organisations to develop and become sustainable.
- Provide support at application stage and over the lifetime of the grant. Staff members highlighted that they could observe the difference in time dedicated to high value projects (often big organisations) and small value

projects, even though they knew small organisations needed more support. They found it to be a very important point to reflect on.

- Foster collaborations between organisations to enable smaller organisations to deliver long-term projects, develop long-term and meaningful
- Provide support to recruit volunteers - it is difficult to recruit volunteers, especially for organisations working with/for under-represented groups, as they are less likely to volunteer than other groups ([NCVO, Time well spent: Diversity and volunteering. 2020](#)).

According to existing research in the sector, organisations led by under-represented groups are more likely to be smaller and face challenges in finding funding ([Voice for Change, Funding for BAME communities](#), 2015).

Quote from a respondent: “I would also love to see more openness to funding core costs for small and especially diverse-led groups, which would support long-term positive changemaking through heritage, rather than 'stuttering' from project to project.”

Expectations and perception of The Heritage Fund

Respondents had four key expectations for The Heritage Fund. Respondents expressed a wide range of wishes or concrete actions they would like The Heritage Fund to take. Their ideas reflected their main expectations for The Heritage Fund (some are cross-cutting):

1. Recognise and respond to the needs of small organisations:

- Provide core or long-term funding to small organisations
- Provide support with volunteer recruitment
- Foster collaboration between organisations to enable smaller organisations to deliver long-term projects, develop long-term and meaningful partnerships

2. Be a champion for marginalised communities in the heritage sector and elevates diverse voices:

- Funding stream for under-represented groups with specific outcomes, because projects focused on under-represented groups (wellbeing and social equity) are likely to require different outcomes and sources of
- Involve people from under-represented groups in decision-making (through co-production, co-design, panels)

3. Advocate for a definition of heritage that includes wellbeing and social equity considerations:

- Better understand under-represented This was also mentioned as a gap by staff.

4. Advocacy and action to prove the importance of heritage:

- Use impact evaluation and data to prove the importance of heritage for wellbeing and social equity
- Make sure that funded organisations can compensate staff fairly, so that organisations can attract more diverse staff

Quotes from respondents:

- “it would be good to see a fund specifically for Because the outcomes would be different. Or also for minority groups like LGBT to have their own access to funding.”
- “I would reach out to those communities and do the market research behind To bring them on board, so those voicers are here when decisions are being made.”

Most grantees have a positive opinion of The Heritage Fund and use terms like:

- supportive, encouraging and enabling (45%)
- lifesaver, vital, valuable (30%)
- open or open-minded (10%)
- grantees were most likely to use positive words

The most criticised aspect of The Heritage Fund is:

- its bureaucracy and the complexity of the application process (20%)
- elitist and academic (2%)
- too prescriptive (2%)
- not culturally diverse (1%)
- stuffy (1%)
- small organisations tend to be more likely to criticise the Fund for being

Grantees think that the Fund understands the value of heritage for under-represented groups but can do better.

We found:

- In the survey, about 54% of respondents strongly agreed or agreed to the statement: “The Heritage Fund truly understands the value of heritage for marginalised groups”, but 33% were neutral and 12% disagreed.
- In interviews, most grantees thought that The Heritage Fund understood the value of heritage for under-represented groups, but a lot of them flagged that The Heritage Fund as an organisation needed to make an effort better assess local needs instead of assuming what people needed.
- Heritage Fund staff also highlighted the need for them to spend more time understanding certain communities.

We asked participants if they could tell us about funders that had adopted an inclusive approach. Funders cited as examples were mainly small and community-oriented, such as:

- [Francis C Scott Charitable Trust](#)
- [Garfield Weston Family Foundation](#)
- [Communities First](#)
- [Northern Rock Foundation](#)

Those funders are appreciated for their understanding of local needs, flexibility, the simplicity of the application process (eg: open format to allow applicants to write about stories and impact).

Some bigger funders were also mentioned:

- The National Lottery Community Fund, for its simplified application process and ability to connect organisations with potential partners
- Paul Hamlyn Foundation, for its progressive approach to social equity
- Esmée Fairbairn, for its focus on communities
- Arts Council, for its Organisation Portfolio and provision of core grants

Identifying organisations led by under-represented groups

We found that it was not possible to identify organisations led by under-represented groups based on existing grants data quality. The table below presents the composition of our interview sample based on type of heritage and leadership:

Types of heritage

Led by

Effort

Outreach to under-represented groups

Not relevant to under-represented groups specifically (eg: Castle Howard, Doddington House)	Not under-represented groups (27)	Effort to make heritage relevant to under-represented groups (eg: reinterpretation, focus on certain elements)
Heritage that is particularly relevant to under-represented groups (eg: Black Cultural Archives)	Not under-represented groups (mostly) (6) Led by under-represented groups (5)	Focus on engaging with those groups for co-production or activities and eventually with a wider public

Only 5 people with lived experience were interviewed (visibly non-white or who shared their lived experienced as LGBT+ or low socio-economic background), which might indicate that only a small number of grantee organisations are led by under-represented groups.

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