

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

Recommendations

Summary of recommendations

- **Adopt a more nuanced approach to equality, diversity and inclusion** that integrates research findings and supports inclusive social and economic
- **Adopt a social equity and wellbeing approach to heritage** in monitoring, communication and strategy to better respond to the role of heritage for under-represented groups.
- **Review The Heritage Fund's communication strategy** and approaches to ensure that organisations working on heritage know that The Heritage Fund is relevant to them.
- **Support capacity building of the sector** by using The Heritage Fund's influential position and convening power, in particular capacity building for partnership development, co-production, decolonisation and disability.
- **Provide support for small organisations and organisations led by under-represented groups** to build their capacity and enable them to thrive, thereby strengthening the sector and supporting inclusive social and economic
- **Improve EDI data collection and conduct analysis on existing data sets** to increase The Heritage Fund's understanding of portfolio from an EDI
- **Encourage power-sharing within The Heritage Fund** to include organisation leaders, volunteers and users in decision-making
- **Ensure that The Heritage Fund communicates its EDI objectives and vision clearly** with staff and adopts a learning culture to make sure EDI strategy is implemented at every level.

Adopt a more nuanced approach to equality, diversity and inclusion

The current inclusion outcome is useful, however its focus on participation is only one aspect of EDI. Using the research findings and existing literature we have developed a framework outlining four dimensions necessary for EDI, relevant to

The Heritage Fund:

1. **Participation** (linked to inclusion outcome): there are different levels of inclusion, from outreach to co-production, the inclusion outcome should capture all of them.
2. **Ownership** (making sure under-represented groups lead and shape heritage, making it relevant to them): based on the observation that only a limited number of grant holders are led by under-represented groups.
3. **Social Impact**: heritage and social impact are often interlinked for under-represented The funding framework should reflect these types of outcomes.
4. **Wellbeing for under-represented groups** (ensuring that under-represented groups also enjoy the wellbeing benefits of heritage): existing research has shown that heritage is linked to wellbeing, therefore taking a wellbeing approach to heritage can help make heritage relevant to everyone and is key to post pandemic recovery.

The framework will:

- provide clear goals to direct The Heritage Fund's EDI efforts and can help measure EDI performance.
- embed inclusion as core to social and economic recovery by including the ownership dimension alongside the wellbeing and social equity lens
- Meet strategic outcomes by addressing the social context of heritage. Wellbeing and social impact address the social context of heritage enabling The Heritage Fund to meet two of the five outcomes of the corporate strategy 20-21:
 - Promoting heritage as a force for good in people's lives across the UK
 - Playing our part in tackling climate change through our investment, operations and partnerships. (Marginalised groups are disproportionately affected by climate change.)

This framework underpins the other recommendations which provide more detail on the four dimensions.

Adopt a social impact and wellbeing approach to heritage in monitoring, communication and strategy

We found that respondents value heritage as a way of addressing social issues. Wellbeing, social equity and community cohesion were reported as key outcomes of heritage for under-represented groups.

The Heritage Fund should:

- ensure the funding strategy accounts for the social context of heritage (inequality health, economic, skills, environment) and the fact that many organisations working for or with under-represented groups do not have heritage as a primary focus (about 50% of organisations in this research)
- further integrate wellbeing and social equity outcomes in a simple and coherent monitoring framework and report on results or/and commission long-term evaluation to build the evidence base
- communicate about and advocate for the role of heritage in wellbeing and social equity
- adopt a wellbeing and social equity lens to enable The Heritage Fund to better align with its objective (Corporate Strategy and 2021/2022 priorities) of embedding inclusion as core to social and economic recovery

Timeline: medium-term (2022)

Review The Heritage Fund's communication strategy and approaches

We found that there is a difference between what The Heritage Fund believes it communicates and what respondents perceive when it comes to the definition of heritage. There is a need for greater clarity around The Heritage Fund's expectations and a more tailored approach to communicating heritage.

The Heritage Fund should:

- review what 'inclusive heritage' means and how it is communicated
- Review communication around the mandatory inclusion outcome to make sure that applicants understand the requirement. At the moment, it is understood by some grant holders as an obligation to grow and diversify their audience, instead of a requirement to adopt inclusive practices that make sense for each project.
- make case studies/profiles of existing grantees easily accessible on the website and share them widely (suggested by respondents)
- consider different ways stories can be told (audio, video) and share its platform so people can tell their own stories
- review communication around its approach to disability and accessibility, to make sure The Heritage Fund's efforts and position are clearly communicated to organisations in the sector

Timeline: short-term (2021)

Support capacity building of the sector by using The Heritage Fund's influential position and convening power

We saw that there is a need for more involvement of under-represented groups in heritage projects. Respondents suggested that this could be achieved through partnerships between organisations and co-production. The importance of co-production in bringing diverse voices to heritage projects was also highlighted by Prof. Richard Sandell.

The Heritage Fund should facilitate knowledge sharing and learning with grantees to generate good practice on:

- developing meaningful and equal partnerships, to enable small organisations to deliver long-term projects
- building capacity for co-production with under-represented groups (so heritage is relevant for them)
- Increasing understanding of decolonisation* across the sector to make heritage relevant to under-represented groups and explicitly move beyond an understanding of heritage as a “White British” social institution. Respondents indicated that heritage was sometimes not seen as relevant for under-represented groups because it was not “about them”.
- Disability issues, to make sure disabled people have access to heritage and participate in projects. The Heritage Fund could build on existing good practices internally (eg: Guidance on Accessibility).

*Decolonisation: “Acknowledging the historical, colonial contingencies under which collections were acquired; revealing Eurocentric ideology and biases in the Western museum concept, discourse and practice; [and] acknowledging and including multiple voices and multiple perspectives” (Kreps, 2011 – quoted in Wintle, 2016, p. 1502). In: Examining the Situation of Decolonisation Within the Culture and Heritage Sector in The South West of England. Black Southwest Network, 2020.

Timeline: medium-term (2022)

Provide support for small organisations and organisations led by under-represented groups

The research identified a need for better support for small organisations and organisations led by under-represented groups (which are more likely to be small). Enabling more organisations led by under-represented groups to thrive means that those groups have more ownership over heritage projects.

It is interesting to note that The Heritage Fund already has experience designing successful grant programme specifically designed to support small organisations and under-represented groups (eg: Kick the Dust).

The Heritage Fund should:

- Consider how processes may need to be different to meet the needs of small organisations. This means adopting an equity approach. The resourcing implications for this should also be considered.
- Provide capacity building for small organisations (eg: on fundraising) to help them become financially sustainable and scale their operations (such as the previous Catalyst programme).
- Facilitate equitable cross-sector partnerships to strengthen the overall sector and contribute to social and economic recovery. This means, in particular, fostering collaborations and partnerships to enable small organisations to scale up their operations and deliver long-term projects.
- Provide long-term and core funding for small organisations led by under-represented groups. As organisations led by/for under-represented groups cannot rely on volunteers as much as other organisations, they need more support to build resilience and This will also support inclusive social and economic recovery.
- Adopt specific funding mechanisms targeted at small organisations led by under-represented groups, with requirements that are adapted to their capacity and support for their long-term development.

Timeline: long-term (2023 and after)

Improve EDI data collection and conduct analysis on existing data sets

From this research, we have found that the existing data can be improved to enable more granular and meaningful research in the future. To refine its EDI strategy, we recommend that The Heritage Fund collect more data on EDI, as well as conduct analysis on existing data sets.

The Heritage Fund should:

- Collect more detailed data at application stage and analyse it This includes making a difference between “led by” and “for” under-represented groups, and between organisations that are trying to diversify their audience (eg: historical buildings) and organisations that have the heritage of under-represented groups at the centre.

- Analyse reasons for rejection given to organisations that were Look for trends in the type of organisations rejected for certain reasons (eg: lack of alignment with The Heritage Fund’s objectives).
- engage with organisations whose applications were unsuccessful
- ensure that analysis of diversity data is conducted on a regular basis

Timeline: short- and medium-term (2021-2022)

Encourage power-sharing within The Heritage Fund

Many respondents would like The Heritage Fund to be a champion for under-represented groups. Involving more people from those groups in decision-making was one option suggested by respondents to achieve this goal. The Heritage Fund already has experience in designing funds involving young people in decision-making.

The Heritage Fund should:

- When possible, increase the number of opportunities for involvement of under-represented groups in funding design and decision making. For example, a panel of heritage organisations leaders from under-represented groups to award grants in specific funding streams, or a user panel (such as that used during the Kick the Dust programme).
- Set up an internal inclusion group with members of staff and volunteers who can interact directly with members of the executive team, with subgroups for each under-represented group. The National Trust recently introduced their “Inclusion Council” based on this model.

Timeline: short- and medium-term (2021-2022)

Ensure that The Heritage Fund communicates its EDI objectives and vision clearly with staff and adopts a learning culture

The Heritage Fund has already developed processes and programmes that are key to integrating EDI into its strategy and processes. It should better leverage internal learnings and experience moving forward.

The Heritage Fund should:

- continue to improve knowledge sharing and learning for staff

- compile a list of programmes/projects related to EDI and under-represented groups (eg: Kick the Dust, Young Roots, research conducted by the Service Design team) and review available evidence on a regular basis to support existing practices
- learn from other funders who have been on a journey, such as The National Lottery Community Fund and Comic Relief

We saw that 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 6.3% because their project was not considered heritage. It is important to ensure that The Heritage Fund's definition of heritage is implemented when grants are being reviewed.

The Heritage Fund should:

- Make sure staff understand The Heritage Fund's objectives in terms of EDI and heritage for wellbeing. It is also important to make sure that staff know how The Heritage Fund's definition of heritage and the inclusion outcome apply to projects.
- Continue to implement the social model of disability at all level of the organisation, which also means encouraging staff to take the model into account in the selection and monitoring of grants.

Timeline: short-term (2021)

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