Inclusion good practice guidance

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See all updates

The Heritage Fund is committed to supporting inclusion, access and participation. We expect the projects we fund to help everyone explore and learn about heritage.

By reading this guidance you'll find out how to involve people in your project, how to develop your audiences, remove barriers to participation and effectively plan these things into your project. You'll also learn about the importance and benefits of wellbeing, building partnerships and safeguarding.

We see heritage as broad and inclusive. We believe everyone in the UK has a stake in heritage and everyone should have the opportunity to benefit from National Lottery funding, regardless of background or personal circumstances.

Inclusion, access and participation is one of the four investment principles that will guide all our grant decision making under Heritage 2033.

Higher levels of inclusion are key to a flourishing, more equitable society. And heritage that is more inclusive will also be more sustainable (another of our investment principles).

Understanding inclusion

The Equality Act (and Section 75 in Northern Ireland) asks us and other public bodies to advance equality of opportunity for people who have a 'protected characteristic'. This includes age (such as young people aged 11–25 and older people), disability (including mental health, learning disabilities and dementia), gender reassignment, race, religion or belief, sex and sexual orientation.

People with these characteristics can experience barriers to being involved in heritage and are generally under-served as visitors, participants, volunteers and in the workforce. People on low incomes can also face barriers to engaging with heritage.

Know your audiences

You should understand who is currently engaging with your organisation and how your project will increase that engagement. What are the demographics of your organisation and is it dedicated to serving any particular communities? Understanding this will give you a baseline from which you can plan for, assess and evaluate change

If you are applying for a grant of **£250,000 or more** you will need to **create an activity plan** for your delivery round application that sets out how you will develop your audience.

It can be helpful to start by reflecting on the evidence you have about your audiences and their needs. Who are your intended audiences for your project, what do you know about their needs, aspirations and reasons why they might not engage? Where are your gaps? Who haven't you spoken to? And which potential audiences don't you hear from? Who isn't currently reached by your work? And what's the learning from other projects, services and organisations about how

best to put together a relevant and exciting offer to get involved?

By assessing your context and identifying people and communities who are missing from your audiences, workforce or governance, you will begin the process of being more inclusive.

To help you understand the demographics of the area you work in, the Office for National Statistics data provides national and local level information on ethnicity and cultural identity in different parts of the UK. You can compare your demographics with the wider community, understand the gaps and make a baseline for the improvements you want to achieve.

To research your current audiences and the communities you work with, you can start by mapping your neighbourhood, area, town or city, including local voluntary groups, faith centres, food banks, etc. Consider the groups with protected characteristics. This doesn't have to be all desk-based research. Could you use workshops and discussions with staff and visitors and local community members? Are there existing events you could invite people to for input on planning for an inclusive, accessible and participative project?

Don't forget qualitative data based on staff, volunteer and visitor experience. This could include comments, journals or structured interviews. Also, survey who works or volunteers in your heritage organisation. This will help you find any gaps in the demographic of your workforce.

Actively using the data and information

Is your **organisation's governance and workforce diverse and representative** of your community? If not, you might decide to include a positive action training initiative in your project. Are there opportunities for participants to take active roles as leaders in your project? How can your governance (your board, your policies and procedures) more accurately reflect the more diverse range of people you want to involve as volunteers or staff? See our Racial equity in nature toolkit and the UK Government's Social Mobility Commission for more information and resources.

Many social categories we use in data and in short-hand overlap and are interconnected. People's lives are complex and multifaceted and aren't always covered or explained by one category in data. Your heritage might already be popular with children and families but not diverse in terms of socio-economic class, for instance. You might decide to focus a project on extending your offer to less affluent schools and families by taking a social mobility led approach to reaching new audiences. If your current visitors are predominantly older, you might consider involving young people in the creation of an exciting, relevant and innovative heritage project. Remember to involve them in the planning and create a safe space for their voices and opinions to be heard.

Remove barriers

Making everyone welcome, especially audiences who have been under-served or have struggled to access heritage, is vital for heritage that is valued, cared for and sustained for everyone, now and in the future. Improving access to heritage will help your project increase its reach and impact and support a stronger and more relevant sector.

The law and regulation around access are important: the 2010 Equality Act legislation and (and Section 75 in Northern Ireland) includes making reasonable adjustments to ensure public services are accessible. But accessibility is also an active, creative and ongoing process that can impact every organisation and project in the heritage sector. Find out more about our approach to reasonable adjustments.

To prioritise the changes that will make the most impact, you will need to understand the barriers people face in getting access to your project as well as the kind of changes that could be made. This should be done through consultation with under-served groups, including potential visitors or volunteers for example, and organisations that work with them. Getting this 'expert by experience' input is crucial to help you understand what you are doing well and what capacity you will need to be able to do more.

Involve disabled people

When thinking about involving disabled people, you should understand and use the social model of disability. This recognises that society places barriers in disabled people's way that can be overturned through societal action and the allocation of resources. The model, developed by disabled people, highlights that society is unequal and that change is not the responsibility of individual disabled people, but of all of us. Scope, Mencap and Mind have further information about the barriers experienced by physically and learning disabled people and the role of mental health in all our lives.

If you run a heritage site or public building, one way of assessing physical barriers is to do an access audit. There are registered access consultants who can help you.

If a barrier can't be removed completely, you should make reasonable adjustments. For example, install a lift or ramped access as an alternative to stairs. Talk to people about the range and type of seating you provide, both outdoors and inside, so families or friends, including an older member needing arm or back support, can sit together to enjoy their visit.

Improving the access at your site for one group with protected characteristics can often help everyone, for example, older people or families with small children.

Consider providing training for heritage staff and volunteers on non-visible or 'invisible' disabilities, including mental health conditions, autism, visual impairments, hearing loss or sensory and processing difficulties. Many disability-led organisations provide regular training, you can include initial training costs in your grant application. Review your training regularly and invite feedback from disabled colleagues and visitors.

Some people with non-visible or 'invisible' disabilities experience a dynamic disability, meaning that sometimes the individual may use a mobility aid, but other times might not need it. For example, sometimes the individual may need a priority seat, and sometimes not. Don't assume what kind of support someone might need, listen to the disabled person and wherever possible offer choices, e.g. different types of seating, accessible travel routes around the site, noise cancelling headphones or other adjustments.

Online accessibility

If you provide digital resources or information, you will need to ensure they are available, accessible, and open. VocalEyes has created a report and access benchmarking tool for the heritage sector, designed to help ensure people with disabilities are not excluded.

If your project is producing digital outputs, for example learning materials, multimedia content, new web pages or sites, meeting our available, accessible and open digital requirements will increase the number of people who can benefit from heritage online.

Find out more about online accessibility in our digital guide.

Other ways to increase access

Sensory barriers can be tackled by commissioning tactile interpretation panels or display, providing British Sign Language talks or events and providing large print or audio guides for exhibitions or trails.

A **lack of intellectual access** can be tackled through multi-sensory learning resources co-produced with an English for Speakers of Other Languages (ESOL) course tutor.

Reduce the **economic barriers** to participating in your project with discounted or free entry days, free self-guided tours, a picnic area where people can bring their own food and introducing free travel option to your project or site.

Get inspired

Projects we've previously funded that you can take inspiration from include:

- **The Royal Horticultural Society** introduced affordable public transport via shuttle buses at some of its sites and 'access to all' tickets including £1 entry for up to six people on Universal Credit.
- **Digital Ossuary's Bamburgh Bones** project helps us understand Anglo Saxon culture and burial traditions using 21st century interpretation tools, both increasing intellectual access to the site for visitors around the world and managing the physical and practical access challenges to this 'hidden UK gem'.
- **Jodrell Bank Observatory** in Cheshire is a world-leading science institute committed to engaging wider audiences. Their website sets out all the access information visitors need to know.
- **RAF Museum Hendon** provides extensive access information, including the exact location of Changing Place toilet provision.
- **New to Nature** is improving access to landscapes and nature by designing and implementing recruitment practices that attract new and diverse talent.

Getting people involved

Projects can take a variety of approaches to involve different audiences more actively. It can be helpful to think about the choices you have as a spectrum. At one end, you can think about which audiences you will invite to get more involved in specific aspects of a broader project. At the other end of the spectrum, organisations can work in an open-ended way with participants, handing over control, ambition and decision-making to the people you want to involve.

As part of planning, projects should think through the right approach for them. No matter the size and focus of your project, a useful starting point is planning to create a welcoming environment where visitors, volunteers and staff feel they belong.

It should begin with **publicity that appeals to the communities you want to attract** which is shared in the places or media used by them. Show them that the offer – whether an event or digital volunteering opportunity, for example – is relevant to them, that you've considered access requirements and reduced their barriers to taking part.

Think about how you can make people feel **welcome at your events or site**. Ensure staff or volunteers who have contact with the public are trained and supported on a regular basis and that concerns (for example unfamiliar behaviour demonstrated by a visitor which may be a result of autism, profound disability or dementia) can be discussed with appropriate staff. Your project is a great opportunity to find solutions to make everyone feel valued.

Having **the right facilities** signals to people that your site welcomes everyone. It shows you are anticipating a wide range of people with different needs and these people are more likely to have a good experience when they do attend. Consider:

- induction loops, interpretation sessions using audio description or object handling to involve blind or partially sighted visitors
- information in community languages, or in-house speakers, to involve a more diverse range of people in heritage
- Improving toilet facilities: Changing Places and gender-neutral toilets can make a difference to who visits and how they feel. If you are organising an event, you can include the costs of hiring a Changing Places facility in your budget plans.

Do you **reflect the people you're trying to reach**? Representation is important. Seeing a range of people represented in staff and volunteers can help a more diverse range of visitors feel welcome. Young workshop leaders, for example, can actively and visibly ensure your projects are engaging and speaking to younger people and lots of projects draw on the voice and perspectives of different audiences in their approach to interpreting heritage for visitors.

Interpretation and displays should also be representative. This can make heritage more relevant, inspire participation and encourage empathy between communities. Consider the full range of stories associated with your heritage, collection, site or building and how you might reflect the experiences of people in relation to, for example, class, gender or sexuality. Supporting communities to tell stories develops a strong sense of ownership, provides interesting new content and can stimulate more participation.

There is large amount of evidence demonstrating that people value the role and safety of UK heritage spaces and the support of staff and volunteers in exploring complex, sometimes challenging histories. Encourage a culture of trust and shared learning about any complex histories your project might explore and how different people and communities experience these difficult, potentially distressing areas in our lives today.

More information and inspiration

- the Stories and Treasures of Street and Dale project at Craven Museum & Gallery invited local people to contribute directly to the displays and interpretation
- Pitt Rivers Museum enlisted community curators with LGBTQ+ lived experiences on its Beyond the Binary exhibition
- see our interpretation good practice guidance for more ideas and advice

Participation and wellbeing

Heritage has a strong role to play in improving wellbeing. Conversely a lack of wellbeing, and poor physical and mental health can reduce people's willingness to participate in social and cultural activities, including heritage. Many projects we've funded have focused on improving the wellbeing of visitors as part of their approach to participation.

The NHS recommends five ways to achieve better wellbeing:

- connect
- be active
- take notice (or be mindful)

- learn
- give back

Heritage projects are often well placed to offer a range of opportunities for people to build these steps into their lives, helping them fulfil their personal and social goals and achieve a sense of purpose in society.

What you could do to improve wellbeing and participation:

- provide opportunities for people experiencing isolation or not in education, work or training to volunteer, with an objective of supporting them into paid employment
- run activities in partnership with local mental health groups or charities, such as handling sessions for people with dementia and bespoke visits for people experiencing autism
- run creative courses for people using mental health services and create a public exhibition of their work
- provide transport, a warm welcome and bespoke activities to enable a wider range of people to see heritage that is beautiful, stimulating or relaxing
- in job descriptions think about asking for transferable skills such as communication, budgeting, digital or great ‘people’ skills instead of formal qualifications

Identifying potential partners

Having identified your target audiences and what they might need to take part, consider potential partners to help you plan (and possibly deliver) the activities or changes you might include. See the resources section later in this guidance for more ideas.

Map the contacts, networks and partnerships that already exist in your area and who might be able to offer support or advice. It can be useful to get help and information from local or national organisations working outside the heritage sector, such as a youth or disability organisation, or a faith, race, sexual or gender equality network.

When considering a new partnership, discuss the aim of your group or organisation and ensure you understand the main areas of work of potential partners. Identify where aims are shared, for example to build skills, training, leadership or volunteering opportunities, or to challenge social isolation and loneliness. What are the pressure points and capacities in your organisations and how can working together deliver positive outcomes for everyone?

There may also be opportunities to work with organisations seeking to tackle the same practical barriers, such as a lack of public transport in rural areas. Other groups might also be looking for improved or alternative provision, through parish councils or community organisations (Scouts, Guides, Dial A Ride), so share your experiences. These conversations could lead you to involve faith, youth or carer organisations in your heritage plans, to pool community development skills and to improve travel opportunities to get a more diverse range of people involved in your organisation.

Safeguarding responsibilities

While safeguarding responsibilities for providers of services could be a topic in itself, we include safeguarding here because opening up your project to new audiences may include reaching and engaging audiences at greater risk of harm or less able to protect themselves from the risk of abuse or neglect. As a grantee, you will need to meet your legal

safeguarding obligations.

If you are working with children, young people or adults in vulnerable circumstances, older people using care services or people with learning disabilities, you will need to have safeguarding policies and practices in place. For more details, see the resources section later in this guidance.

Remember that many sectors and organisations outside heritage, including youth, education and health sectors, currently use safeguarding procedures as standard practice. Start conversations with experienced people about safeguarding as part of building your knowledge about inclusion and involving a more diverse range of people in heritage. Do not ask or expect volunteers on your project to be responsible for supporting vulnerable participants without providing training, supervision and support. Make it clear to volunteers who in your organisation holds responsibility for safeguarding. If you can't do this, do not include these groups as part of your project.

Our guide to working with young people and children online and online privacy and security guide will help you safely manage online activities and meetings.

If you are creating digital resources with or about children and young people, special category data or adults at risk from harm, you will need to read our guidance on creating digital resources: GDPR, copyright and using open licences.

Feeling safe

We know that heritage can play a part in connecting communities, building trust and knowledge and strengthening social networks. Yet the rise in hate crime in the UK towards people with protected characteristics, such as learning-disabled people, LGBTQ+ communities, diverse ethnic communities and faith groups, has made some people understandably feel unsafe and unwelcome in public spaces. Consider issues of safety in your organisation as part of your inclusion planning and staff training.

Planning your project

It probably won't be possible to achieve everything you can think of with a single project. It is important to focus your plans. Ambition is vital in committing to improve and transform projects and the heritage sector more broadly. But you and your team need to be clear about what you are going to do and confident you will be able to achieve the goals your project sets out.

Sustaining your impact

Plan the evaluation of your inclusion work from the start, including thinking how you might sustain your impact. Consider how this project can help achieve your longer-term ambitions for inclusion. What changes will have been made? Will you be able to evidence that you have stronger community connections, new governance models, wider staff skills and expertise or new permanent facilities that are valued by the people you have reached with your project? How will you make sure you capture the views and experiences of the people involved in your project and respond to them during and beyond your project?

Budgeting for inclusion, access and participation

You will need to budget appropriately to ensure your inclusion work is realistic and deliverable. There are some simple principles to follow and a checklist of possible costs to consider.

Fair pay and treatment

- Ensure you are paying at least the Living Wage rate, or London Living Wage where applicable, for all staff involved in your project.
- While internships can give people opportunities for valuable experience, they are not possible for people from lower income families. Interns who meet the definition of a 'worker' should receive either the National Minimum Wage or National Living Wage depending on their age.
- Do not expect disabled people, younger people or other people whose expertise you value and draw on to donate their time. Are there ways you can pay or provide appreciation (eg: vouchers, family entrance tickets) for time and expertise shared?
- People will feel more valued when you provide good and appropriate refreshments. Think about cultural and dietary preferences. Check what people eat and drink in advance and try not to make assumptions.
- Consider any hidden costs. For example, including learning disabled people as full participants and contributors to your project may involve covering the costs of a support worker, extra learning resources, transport or significantly more time. Discuss these costs early on with partners and budget accordingly.

Checklist of possible costs to consider

Depending on the size and scale of your project, you may need to consider some or all of these costs in relation to your inclusion work, helping to remove barriers and making reasonable adjustments:

- audience research and monitoring: baseline setting and collection and analysis of data
- consultation with community groups you want to reach and/or access audits
- community engagement or learning events
- hosting costs for digital outputs and online accessibility testing
- website hosting, design and publicity, and research for new content/stories
- recruitment and training costs for trustees, staff, volunteers
- reasonable adjustments for sites: physical access, interpretation or sensory adaptations
- other costs of involving people, such as volunteer expenses, transport costs, childcare costs, protective clothing or health and safety equipment for trainees
- digital project equipment, training and connectivity costs for participants who do not have devices and internet access or have limited digital skills
- Translation costs: projects we fund in Wales must deliver services, activities and materials in English and Welsh. It might also be appropriate for you to use Gaelic, Cornish or another community language alongside English in your project depending on the context for your work.
- Evaluation and sharing your learning with people within your organisation, funders and stakeholders. Thid helps ensure transparency, accountability and can highlight how improvements can be made.

Resources

- The Taking Part survey in England provides information on a range of participation and engagement, including heritage.

- The Monitor of Engagement with the Natural Environment (MENE) survey provides trend data for how people use the natural environment in England.
- The Equality Trust documents the effects of inequality on our society.
- The UK Government has created a website to support its Race Disparity Audit giving facts and figures relating to ethnicity.
- The Runnymede Trust publishes research on race, ethnicity and equality, including the interconnections between gender, ethnicity and poverty.
- The Social Mobility Commission is a statutory and independent body that exists to help create a country where the circumstances of someone's birth do not determine their outcomes in life. The Commission publishes a range of toolkits and resources to help employers.
- The Sutton Trust works on UK social mobility. They have researched the role of unpaid internships as a barrier to career progression.
- The Sensory Trust provides a range of guidance, tools and resources to help organisations improve their accessibility.
- VocalEyes provides guidance and learning on digital accessibility and inclusion to support a range of organisations, including resources co-designed by disabled and D/deaf colleagues.
- Glasgow Women's Library has produced a report on inequality to inform the work of the museum sector.
- The Shaw Trust is one of many charities in the UK working on behalf of disabled people. They often work in partnership and offer accessibility advice services.
- The UK Government has published advice on accessible communication and a range of charities also provide resources, including RNIB, RNID and Action Hearing Loss.
- Historic England produces guidance on easy access to historic buildings and landscapes.
- The NHS publishes advice on safeguarding for vulnerable people.
- Kids in Museums have a clear overview of safeguarding which is relevant to heritage projects seeking to understand roles and responsibilities.
- The NSPCC provides information and guidance on child protection in all four nations of the UK.
- The Access All Areas disability consultancy has produced a video of Royal Court Theatre accessibility resources including venue directions, front of house, ordering drinks and chill out spaces.