Activity plan good practice guidance

29/01/2024

See all updates

An activity plan sets out everything you'll do as part of your National Lottery-supported project to engage, grow and diversify the audience for your heritage.

Attachment	Size
XLSX View Action plan template as XLSX(12.4 KB)	12.4 KB
XLSX View CYMRAEG: Templed cynllun gweithredu as XLSX(13.72 KB)	13.72 KB

By reading this guidance you'll learn how to create an activity plan in three steps, the success factors involved and tips for successful planning. It also includes a link to an action plan template in Excel.

An activity plan will help you understand:

- where your organisation is now (set benchmarks)
- where you want to get to (set your ambitions)
- what you will do to achieve those ambitions (the specific actions you will take to deliver the overall activity plan, using the action plan template to add practical details on things like costs and timing)

Who needs an activity plan?

If you're applying for a grant of **less than £250,000**, you will need to create a project plan rather than an activity plan.

If you're applying for a grant of **£250,000 or more** you will need to tell us how you will cost and create the activity plan in your development round application, including what you want to achieve and for who.

If your application involves multiple projects delivered across an area to produce a cumulative impact, you should create an area action plan instead of separate activity plans.

After a development round award you'll be expected to produce an activity plan and submit it as part of your delivery round application. This is when you'll have the opportunity to firm up your plans. You will need to decide which specific groups of people you want to reach with your funding and how this will contribute to the investment principles in our Heritage 2033 strategy. Then set out all the activity – in detail and properly costed – you will undertake to meet their needs.

We'll expect you to collect data on the people you reach and, as part of your project evaluation, evidence your success in delivering the activity plan.

What an activity plan is and isn't

Your activity plan should be specific to the heritage project you are asking us to fund. It's not the same as your plans for everyday work or a general development plan for your organisation's activity.

The level of activity, and the time it takes to plan, should be proportionate to the size and ambition of your project and the funding you are asking for. The development process usually takes months not weeks.

An activity plan doesn't include:

- Large-scale interpretation involving significant capital costs. (If your project involves creating a new gallery, for example, you may need to have a separate exhibition or interpretation plan, but make sure to cross-reference the relevant information in your activity plan.)
- Other related planning work from your development phase. (For example an access audit is an essential part of planning capital works to a building or site. The information from this additional planning may help inform your activity plan though.)

Creating your activity plan

This guide describes a three-step process that will help you create an activity plan:

- Step 1: Where you are now – benchmarking
- Step 2: Where you want to get to – ambitions
- Step 3: How you'll get there – including activities and your detailed action plan (download the action plan template from this page, above)

Step 1: Where you are now

This step is about looking at your current situation. It will help you think through why you want to engage new people with your heritage. You will need to consider:

- **Your organisation:** who needs to be involved in planning your activity and do you need to make organisational changes to make it happen?
- **Your audiences**: who currently volunteers, visits or participates and who are the people not currently engaged with your organisation and heritage?
- **Your current activities:** how do people interact with your heritage now and how does that compare with other organisations?

Suggested actions during Step 1 include reviewing your **policies and practices** and your **existing data** and **understanding who is missing** (see below). You can then **start the first draft** of your activity plan.

Policies and practices

- Review strategies and plans, for example, your mission statement and corporate plan.
- Review your policies, for example, education, interpretation, volunteering, training, safeguarding.
- Develop and agree policies if you don't have them. You will find lots of examples online.
- Talk to staff, trustees or governance members, volunteers, key partners and stakeholders to increase understanding of the issues and ownership of the project.

- Review your organisation's capacity and consider where you might need additional support or to make changes to management arrangements.
- Review people's skills to do planning work and consider providing specific training and development to increase team skills. Allocate a budget for professional development for staff, volunteers and governors as part of the project. You could deliver some training during your development phase if you cost it.
- Talk with and visit other organisations who have done similar projects.
- Learn from previous organisational change projects, for example, Our Museum (the principles are useful to other types of organisation).
- Find out about and join professional networks, groups and organisations that offer training, for example, GEM (Group for Education in Museums and other heritage), Engage, Visitor Studies Group, BGEN (Botanic Garden Education Network), Natural England's Outdoors for All Group, Oral History Society, Association of Heritage Interpretation, Museums and Participation Network, Museums Association, etc.

Your existing data

- Review your existing user information, for example, in-house visitor data or material you have from people who've been involved in your activities (evaluations, comment books, letters).
- Collect new data on your current user profile if you need to. Consider specific research such as surveys, focus groups, talking to visitors. You might ask an audience development consultant to do the work or to train you to do it – you could plan to do this early in your development phase.
- Look at local data such as community demographics. Is the profile of your users different and, if so, why?
- Look at national or general heritage research into people and heritage. There are some references in our inclusion good practice guidance or you can use data sources held by tourist organisations or local cultural organisations.
- If your organisation has a conservation management plan, check if it tells you why your heritage is important and who it is important for.
- Review the nature of your heritage and its potential links to specific audiences such as local communities of interest, disabled people or young people.

Understanding who is missing

- Review material you have about how potential audiences see you and what you do. You might want to hire someone to do specific surveys of non-users.
- Think about the gaps in what you know about these people (especially motivations they might have for engaging with your heritage in the future).
- Think about the barriers that some audiences typically face when engaging with heritage, for example, physical and sensory, cultural, organisational or intellectual.
- Look and learn from what others are doing to attract new people to their organisations using targeted activities.

To help you understand who is missing in greater detail, see our inclusion good practice guidance.

You can start drafting your activity plan. The first section should:

- summarise your organisation's commitment to engaging the public and the relationship between heritage and people

- describe any changes you have made since your development round application
- describe any further changes that you will make during your project
- describe how you are creating your activity plan, including:
    - who has been involved in its drafting
    - who has been involved in helping you to develop your ideas about what you can do to engage people
    - what you have learnt from others
- summarise what you know about the audiences for your heritage now
- describe the potential audiences for your heritage and any barriers your organisation might face in engaging people, for example, access barriers at your site, a lack of child-friendly activities, costs, opening hours, lack of expertise in your organisation
- describe what you currently offer your audiences
- describe how you present and how potential audiences value what you offer
- describe what you could be doing based on good practice in other organisations
- put a summary and the full findings of each piece of research or consultation created in the development period in an appendix, together with any newly created policies that relate to engaging people

Success factors for Step 1

At the completion of Step 1, you should be able to:

- show you know what organisational arrangements are needed to deliver your aspirations
- show what others have done and how you will build on good practice
- list who can help you (partners, volunteers, peer support)
- describe what you do now and how people are already engaged with your heritage (including what kinds of groups and their numbers)
- demonstrate how people feel about what you do – how well known it is, how well it is valued, how much engagement people have with it
- set out who could be engaged with your heritage through your project

At the completion of Step 1, you should also be beginning to:

- list what you might need to change in your organisation (you will build on this list as you go through the planning steps)
- think about and show why your project is needed, in terms of what it can offer people and communities
- develop ideas of what you could do in the future (these ideas will give you options for the next step)

Step 2: Where you want to get to

Step 2 is about linking together the information you've collected, deciding what it all means for your project and making informed decisions about how you want to engage, grow and diversify your audiences and what that will look like when you're done. You will go on to plan the activities in detail and explain how you will deliver on our investment principles in Step 3.

If your project involves more than just activities, this is also an important moment to inform the other people involved in developing the whole project about the decisions you are making.

Allow plenty of time for Step 2. You will need to consider:

- **Your project:** what is it seeking to achieve?
- **Your audiences:** who is your project for? Who do you want to target with your activities and why?
- **Your activities**: what activities are realistic and appropriate for the people you want to reach? How will the activities link to our investment principles?
- **Your staff**: who will lead the various activities? Do they have the knowledge and skills required?
- **Measuring success**: how do you measure success for these activities? How will you evaluate your activity plan? What will this cost?
- **Longer-term benefits**: How will you maintain the benefits after the project? How will your organisation change and develop for the future? How will you share lessons with others?
- **Costs:** what is the cost of the activities? Are the total costs in proportion to the cost of the project overall?

The second section of your activity plan should set out your ambitions. It should:

- give an overview of the kinds of activities you want to deliver (details come in Step 3)
- set out how the project fits with the appropriate policies and your organisation's overall purpose and demonstrate your organisation's commitment to putting the activity plan into action
- summarise the choices you have made and tell us why these audiences matter to your organisation
- give a concise and realistic description of what your project will do to engage people with the heritage and make links to any large-scale exhibition or interpretation plans
- set out plans for how you will handle any potential difficulties in engaging people
- give a structure chart for the management of the activities in your project
- create job descriptions (with competitive, industry-standard salaries) for staff, apprentices and interns, role descriptions for volunteers and briefs for any freelance workers or consultants
- think about whether your proposed costs are realistic (you'll revisit this when you work out detailed costs in Step 3)
- summarise your overall plans for evaluating your measures of success for engaging people
- set out how you will share the lessons of your project
- set out what will happen once the project is complete (long-term benefits) and how your work with audiences, the interests you generate and the materials you use could help sustain the benefits of your project
- set out how your organisation will be different after the project and how you will continue to develop your work with communities to ensure your organisation is sustainable
- Give a summary of the budget for activities (which should be the same as you give in the delivery round application form). The detailed budget for activities will be in your action plan, completed as part of Step 3.

Success factors for Step 2

At the completion of Step 2 you should be able to show:

- why this project is best for your situation (your organisation, your heritage and place, and the people you have decided to target)
- that your plans meet the needs of the people you intend to reach
- what else you have considered and why it is not right for this project

At the completion of Step 2 you should also be beginning to think about:

- objectives
- how they fit with the Heritage Fund's investment principles, targets (audience targets and targets for outputs like numbers of leaflets, workshops, oral history recordings, etc), resources, budget, timetable and measures of success

You may need to wait until you have drafted the action plan to complete this section, including your methods of evaluating individual activities.

Step 3: How to achieve your ambitions, including a detailed action plan

This step is about what you're actually going to do to engage people and communities with heritage in your project. This is the crucial stage of working out and presenting how you will deliver your activities.

This step begins with the actions to consider.

Discuss and reflect

- Draw on all the information you have collected so far.
- Review successful activities (yours and other organisations).
- Consult people to create new ideas. You could involve your target audience in designing activities that will meet their needs and interests – this is often called co-creation.
- Talk to the other people planning your heritage project to make sure you have made the most of opportunities. For example, have you developed activities that help the public learn about any conservation work or provided opportunities for new trainees? Could you include activity linked to recruiting and training new governance members?

Think about practicalities in detail

- Draft a mini project plan for each type of activity to make sure you have thought about everything to make it work.
- For major activities, for example, a programme of workshops or an exhibition, write briefs for external suppliers, get quotes, decide value for money.
- List the facilities, equipment and other resources needed for each activity.
- List the skills and experience needed to deliver each activity.
- Review existing staff and volunteer skills and consider training for people to deliver activities. You could put this training into your action plan as one of your project activities.
- Investigate partnerships with other organisations to bring in resources, skills and expertise.
- Consider the need for new staff, volunteers, and freelance workers. Write job descriptions.

Work on the budget

- Work out the direct costs of equipment, materials, freelance staff, travel, etc.
- Work out in-kind contributions, for example, volunteer time or other contributions to your activity.
- Review the overall budget for direct costs and in-kind contributions you created under Step 2 and change as necessary to ensure they are realistic and offer value for money.

Think about evaluation

- Review the various evaluation methods available to you, for example, surveys, observation, comment books, and decide which is appropriate for each activity.
- Set targets for each activity and for each audience, for example, numerical targets for an increase in visits by a target audience, and qualitative targets, for example, for visitor satisfaction.
- Consider the resources you need to undertake evaluation, for example, people, money, time.

Discuss and reflect again

- Share your thinking and draft timetable with others involved in the project, especially the overall Project Manager.

Completing the action plan template

As you go through Step 3, you need to transfer the detailed information about the activities you have planned to our action plan template.

To support the aims of your project you should fill in the template under the following column headings:

- activity: detailed description
- target audience for activity
- outcome: what change will there be
- resources
- costs in project budget (itemised and total costs)
- timetable
- targets and measures of success (you should evidence your achievement against these targets in your evaluation report)
- method(s) of evaluation

You should revisit Step 2 of the process to check that the ambitions you set are still right. If they are, you should now be able to use all the information detailed in Step 2 to complete the plan. Where relevant, don’t forget to summarise the information from your activity plan into your delivery round application.

Success factors for Step 3

Being able to show:

- a plan of action which details how you will engage people with your heritage
- that you will contribute to our investment principles in proportion to the size of grant you are requesting
- how you are going to achieve these outcomes through activities
- an activity plan ready to attach to your delivery round application

Tips for successful planning

Do it for the right reasons

Use the process as a positive planning tool. Produce the plan to help develop and sustain your organisation.

Involve people

Use the process to bring together the people who will be essential to the success of your project. Make sure the document draws on diverse views. If the right people are not involved, this could lead to delays and extra costs. If appropriate, you should involve any partners in drawing up the activity plan and make sure you consider their views.

Get specialist help

You may need a specialist to help you prepare your plan, do audience research and ensure you and your team have the skills to implement it, especially if you don’t have experience engaging the public. The right advice can save you time and money in the long term.

Working with consultants

If you ask consultants to help prepare a plan, make sure you work closely with them and dedicate enough time to the process. Make sure they use the knowledge of your staff and volunteers and produce a document that genuinely helps you.

Manage it

Be prepared to take an active role in managing the planning process. Make sure the plan you prepare or commission helps you engage the public in ways that meet their needs and help achieve our investment principles. Manage the process from the first discussion of the idea through to the commissioning process to make sure people use the plan in the long term.

Mediate

Use the plan to mediate between different ideas about heritage. For example, building specialists and learning specialists might have different ideas about how to manage and open up your site. It is important everyone in your organisation is happy with the activity plan.