

Review of the Heritage Lottery Fund's Investment in Oral History Projects

Research Report for the Heritage Lottery Fund (HLF)

Final Revised Report, 2013



CULTURAL CONSULTING NETWORK

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Heritage Plus, Womens' Royal Voluntary Service

Songs of Steel, Rotherham Arts and Archives and Local Studies

Sharing Tongues, Rukus! Federation

Italians in Wales, Enaip

High Fell: The Cumbrian Landscape Story, Cumbria Wildlife Trust

Structure of Review Report

To help the reader navigate this review the following may be helpful:

- Section 1:** outlines the agreed research aims of the review, its methodology, sources of evidence, data and information gathered, containing an broad analysis of the returns in our survey sample of HLF-supported oral history projects and a sketch of the kinds of projects included in the sample;
- Section 2:** provides an overall qualitative summary of the value and impact of HLF-supported oral history projects extrapolated from what was reported to us by grantees and our interview group;
- Section 3:** looks at the current operating context for HLF funding of oral history (both external to HLF and internally) to set the scene for the detailed research findings that follow;
- Section 4:** outlines some of the issues that surround the definition of oral history and its effect on HLF funding;
- Section 5:** analyses some aspects of project development of HLF oral history funded projects, motivations for undertaking oral history, themes of projects, and the kinds of advice and support sought by applicants and delivered by support organisations;
- Section 6:** considers the sustainability of the outputs of HLF-supported oral history projects, covering matters of deposit, associated documentation, secondary outputs (such as online extracts, exhibitions, and academic use) and observations on the quality of oral history recordings and the secondary outputs;
- Section 7:** considers the sustainability of the outcomes of HLF projects, in terms of project benefits and partnerships;
- Section 8:** Offers a brief analysis of the views of grantees and our interview group on their experiences of HLF;
- Section 9:** provides suggested recommendations for HLF to make its funding of oral history even more effective;
- Section 10:** acknowledges the help and support we received in the production of this report.

1. Research Aims and Methodology

1.1 Aims of evaluation

In January 2013, Heritage Lottery Fund (HLF) commissioned Cultural Consulting Network to undertake a UK-wide review of HLF's investment in oral history (OH) projects, producing an internal report to its Management Board. This report is intended to inform HLF in consideration of future assessment, priorities, guidance, policy and support for applicants and staff as well as to acknowledge the impact and legacy of HLF funding for OH projects. In particular, HLF wish to obtain an overview of how far investment in OH helped to deliver its strategic aims (for the period 2002-2013) to:

- conserve the UK's diverse heritage for present and future generations to experience and enjoy;
- help more people, and a wider range of people, to take an active part in and make decisions about their heritage; and
- help people to learn about their own and other people's heritage.

The research brief set out some detailed questions to help frame the research:

- What is the quality of the oral recordings? Is the right technology being used to ensure they can be preserved for the future?
- What is the legacy of the recordings? Are they deposited in publicly accessible repositories? Can they be found by interested researchers and members of the public? What issues do archives face in accepting OH material?
- What evidence is there to suggest that OH projects have had an impact on organisations (new audiences, partnerships etc.) and/or on communities who benefit from our funding?
- How have recordings been shared with the public? What is the quality of the learning outputs that have incorporated oral histories?
- What is the potential for existing oral histories to be reused and shared with new audiences?
- What has been the experience of project participants trained to collect and share OH?
- What are the benefits of HLF continuing to support OH projects, and what are the challenges? What are the issues linked to HLF recording the same kinds of histories in different geographical locations? Is there an argument for HLF targeting funding at areas of social history that have been less well documented to date?

After further discussion with HLF, it was agreed that the research brief broadly divided into two main areas for analysis; that there was a need to have an informed view of:

- the quality and usefulness of outputs in relation to professional OH and social history research requirements;
- the impact of engaging people with heritage through the medium of OH projects.

There was also a need to update information and guidance on what makes a good project, key success factors and common issues. We agreed with HLF that six accompanying case studies would highlight these elements; they have been written to be of value to potential applicants during the lifetime of HLF's new strategic framework 2013-18 *A Lasting Difference for Heritage and People*.

1.2 Research methodology

The research methodology was principally comprised of the following stages:

Stage One: Grantees A short electronic survey issued to a random sample, identified by HLF's research team, of 197 completed OH projects funded through the 'Your Heritage' or 'Heritage Grants', covering all of the UK. The survey gathered information from grantees specifically on project support, motivation, outputs, outcomes and legacy. The survey sample took account of: geographical spread; value of award; type of applicant organisations and partnerships; projects with the main aim of undertaking OH and projects undertaking OH as part of a wider project. A copy of the survey is attached at Appendix 1.

Stage Two: Professional Heritage Organisations and Stakeholders A series of 21 interviews (mainly conducted via telephone with a few face-to-face) with a sample of established archive, library and museum organisations that have accepted OH material generated by HLF projects into their collections, and/or provided support to community OH projects. The sample also included Oral History Society (OHS) networkers, accredited trainers, committee members and the British Library (BL). The purpose of these interviews was to tease out some of the issues relating to support projects, the quality of the OH recordings, their preservation, use, accessibility and value to members of the public and researchers. We looked for organisations and individuals who had supported several HLF funded projects and who have a degree of knowledge about the quality of outputs and outcome beyond that expected from grantees as well as a knowledge of the heritage sector more widely.

We also interviewed two HLF Development Managers with significant internal experience of advising on OH projects for their opinion on the extent to which the projects have met HLF's strategic aims and the opportunities and challenges they present.

Stage Three: Oral History Society Through the regional network structure of the OHS, we gave an opportunity for its members (not included in Stage Two above) to offer to us any views on HLF investment in OH.

Stage Four: Round Table Discussion Managed by HLF, a round table discussion was held with 11 senior professionals within the OH sector and attended by six HLF staff. Participants were presented with initial findings from the sample survey and structured interviews. These were then used as a basis for debate about the impact of HLF funding for OH and identification and discussion of any strategic issues affecting these projects.

1.3 Context

In July 2012, HLF launched its new Strategic Framework for the years 2013-2018: *A lasting difference for heritage and people*. The Strategic Framework, sets out the context for investment for the next five years with the flexibility to continue to respond promptly to newly emerging needs that might arise in a challenging economic environment.

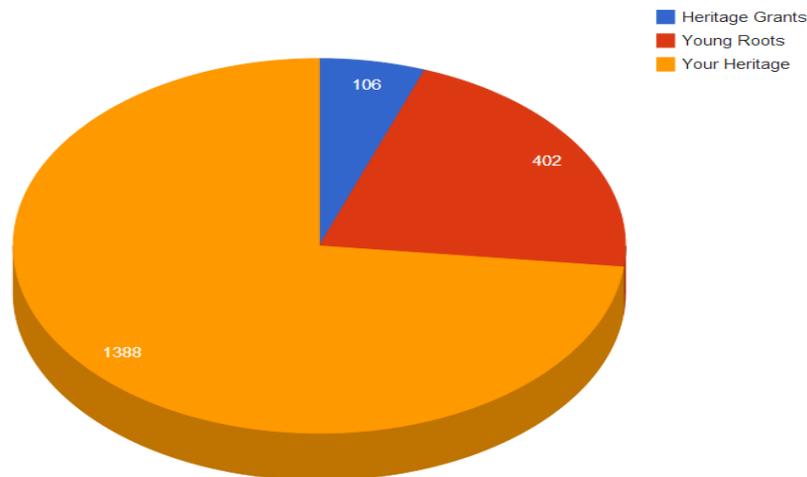
With this new framework HLF has moved to a fully outcomes-based approach to assessment. Applicants are asked to achieve one or more outcomes in proportion to the amount of funding they request. One of 14 outcomes in the framework is that with HLF investment, 'heritage will be better identified/recorded'; it is envisaged that organisations undertaking new OH recordings will typically achieve this outcome, among others.

HLF has awarded over £81 million to more than 3,100 projects that include a significant element of oral history, with most of these funded since the launch its *Broadening the Horizons of Heritage* strategy in 2002. Ten years on it was considered timely for HLF to review and celebrate the impact of its funding to establish what has been achieved. Furthermore, it sought to use the evidence contained in this review to inform what actions it may take to ensure that projects with an OH element can contribute effectively to the objectives of its new strategic framework.

HLF has supported oral history projects of all sizes across the UK, from small community projects to large national ones. Over 77% of the oral history projects funded were led by community and voluntary groups, interested in exploring their local history and encouraging cross-community dialogue.

Over 70% of oral history projects have been awarded through HLF's Your Heritage programme which, until recent changes, funded projects between £3,000 and £50,000 (see Chart 1 below.)

Chart 1. Oral history projects by programme



1.4 Analysis and overview of survey sample of projects with an OH element

1.4.1 Number in final data sample: The number of survey returns was 94. 4 returns were deleted from the sample as they related to unfinished projects where the majority of the OH element was yet to be undertaken, so that that the final data sample was 90. This represented a completion rate of 48%, which was higher than anticipated, bearing in mind that many of the sample projects had finished some years ago, with resultant difficulties in contacting the former project leads.

1.4.2 Completion rate and quality: The quality of responses was generally good, with a very high rate of completion (average of 86%) and standard of comments where qualitative statements were solicited. There were no major issues of misinterpretation of the survey questions.

1.4.3 Types of organisations in the sample: There were survey returns from 35 established heritage organisations and 59 non-heritage organisations (which were mainly various types of community or special interest groups). This split is broadly comparable with the pattern of HLF-supported OH projects per se .

For the majority of respondents (55 out of 90) the collecting of OH is not one of the main aims of their organisation, reflecting the fact that OH is not the primary purpose of either most heritage organisations or community interest organisations.

In terms of the sorts of organisations undertaking OH, the sample broke down as follows:

Table 1: Breakdown of survey sample by kinds of grantee organisation (total 90)

Community organisations not with a heritage focus (e.g. St Michael's Primary School, Walton Charity)	18
Museums, archives and libraries (e.g. Swaffham Museum, Essex Record Office)	14
Community organisations with a heritage focus (e.g. Selstonia Living Heritage)	13
Arts organisations (e.g. Pascals Theatre Company, Another Space)	11
Organisations led by black, Asian and minority ethnic (BAME) groups (e.g. Rukus! Federation, Chinese Mental Health Association)	11
Environmental, landscape and biodiversity organisations (e.g. Shropshire Wildlife Trust, Feel Pony Breeders Association)	8
Organisations representing the interests of Lesbian, Gay, Bisexual and Transgender (LGBT) communities (e.g. Freshwinds, Plymouth LGBT archive)	6
Local Authorities (e.g. Kirklees Council)	6
Universities (e.g. University of Hertfordshire)	3

1.4.4 **Geographical spread:** We were charged with ensuring that the survey sample reflected HLF's remit to fund projects across the UK, which the sample results demonstrate :

Table 2: Breakdown of survey sample by UK geographical region/country

London	16	Eastern	7
Yorkshire	14	East Midlands	7
West Midlands	11	North West	7
South East	10	North East	3
South West	8	Wales	2
Scotland	8	Northern Ireland	2

1.4.5 **Focus of the OH within the sample of projects:** We analysed the sample of 90 projects to determine the main focus of the content of the oral histories undertaken. Several projects had a mixed focus, hence the figures in Table 3 add up to more than 90:

Table 3: Breakdown of survey sample by focus of oral history (total 90)

Geographical focus on a particular locality (ranging from an estate to a county)	85
Focus on the experiences of a particular ethnic group (e.g. Rwandans in UK)	18
Focus on the working lives and industry (e.g. fishing in Filey)	16
Focus on particular aspect of experience (e.g. living with mental health issues)	11
Focus on the evolution of the landscape or wildlife (e.g. Fell Pony Breeders)	6
Focus on the experiences of LGBT groups	6
Focus on language heritage	3
Focus on the experiences of people with disabilities	2

There were only five projects in our sample that had a UK wide focus (e.g. *ARKive*, Wildscreen Trust which focussed on the history of wildlife film making, and *Reaching a Worldwide Audience*, Liverpool School of Tropical Medicine that focussed on the testimonies of ex-Far East Prisoners of War during the Second World War, the other three were projects recording BAME experiences. Most projects had a focus on an immediate locality, town, city or area (e.g. Bridport, Luton, Filey, Peak District, Lancashire).

The data above shows that the vast majority of projects that were about recording the experiences of a social group had a geographical boundary (e.g. *African Heritage Initiatives: Contribution of African Migrants in Birmingham*, Cameroon Advice and Support Service). The same was true for projects focussed on LGBT experience (e.g. *Walking Proud in East London*, River Cultures Festival).

Worthy of note were the number of projects which sought to record the working lives of people in a particular place, concentrating on industries and businesses that had helped to form the identity of an area (e.g. *Celebrating Stornaway*, Stornaway Historical Society which looked at the impact of the local fishing industry). Three of these projects also had a BAME focus (e.g. *The Past*, African Heritage and Educational Centre, which recorded the working lives of Jamaicans, Ghanaians and Nigerians in factories were sited where the Olympic park stands in East London).

Of the projects with a particular focus on one aspect of experience not covered by the other categories, recollections of interaction with health institutions were common. A typical example of this was *Hidden Minds*, Mind in Harrow, which captured the memories of former residents of the now demised and notorious Shenley Asylum and looked at the changed nature of support for people with mental health issues, as experienced by them.

1.4.6 **Audiences and activities:** The projects in the survey sample had been working with a

wide variety of audiences; the majority of targeted more than one kind of audience.

Those involved in the process of creating OH were often a different audience from those who benefits from the accompanying activities of the project (reflecting projects' aim to reveal previously poorly documented aspects of history to a wider public). Some examples of activities included:

- OH of retired steel workers relating experience of their working lives, edited highlights of which were used as the inspiration for song writing by young people on an estate next to a former steel works. (*Songs of Steel*, Rotherham Arts and Archives. See accompanying case study)
- OH of the lives of black LGBT people living in the UK, forming the source material for a series of broader community engagement days in London, Manchester, Birmingham and Liverpool (*Sharing Tongues*, Rukus! Federation. See accompanying case study)
- Recordings with people who lived and worked in the high fells of Cumbria were used in the production of the Great Langdale audio-tour that is designed for hill walkers to enjoy on the fells. (*High Fell: The Cumbrian Landscape Story*, Cumbrian Wildlife Trust. See accompanying case study).

Fewer projects concentrated on the same audience being involved in the same activities, where oral history was the main focus of the project. For these projects the emphasis was sometimes on difficult subjects where it was important to bring people who may have experienced the same kinds of marginalisation to come together to share their memories. An example of this was the 'Archive Weekends' that formed the core of the *Therapeutic Living with Other People's Children* project undertaken by the Planned Environment Therapy Trust (see accompanying case study). The weekends involved members from several generations of the same community staying at the Archive and Study Centre over three days. At their own pace and with support, they volunteered in activities centred on using, developing and valuing their skills and unique knowledge to extend the archive.

Similarly, the *Heritage Plus* project by the Women's Royal Voluntary Service (see accompanying case study) was focussed on increasing heritage engagement by older people through involving them in recording and sharing their own histories to improve their general wellbeing. Although the project activities were wide ranging, the emphasis was on encouraging older people to enjoy heritage (e.g. by visiting historic sites and through creative workshop that explored their memories), so that they would feel comfortable in going on to be interviewed about their own lives.

The kinds of people who contributed their life stories to form the OH reflect the focus of the projects as described in 1.3.5. However the project activities were much more broadly targeted.

Trends that could be discerned were:

- The involvement of volunteers in oral history recording was extensive (78 out of the 90 projects). These volunteers ranged from those people with an obvious interest in the content of the material (e.g. users of current mental health services interviewing previous residents of an asylum) to school age children who were entirely new to the subject matter (e.g. children from the rural areas of Howardian Hills interviewing the elder generation from the urban centres of York and Hull).
- The importance of mainstream heritage organisations acting as a venue (for exhibitions, performances etc) so allowing often marginalised groups to reveal their OH to a wider public and have their narratives recognised within that setting (e.g. *Sharing Tongues*, Rukus Federation exhibition at London Metropolitan Archives).
- Imaginative use of OH and new technologies to generate creative outputs produced by young people (e.g. performance plays, songs, digital films and audio trails).

Evidence of grantees making the most of broadcast media to expose the OH to a much wider audience than might be achieved through a physical exhibition (e.g. *Movies and Memories* project, Screen Archive South East, highlights of which were shown on Southern Television).

2. Overview of impact and value of HLF funding of OH

Our research clearly established the step change that HLF investment has generated in the volume and extent of OH activity in the UK and the benefits accrued through this for heritage, people and communities. This section of the report focuses on impact and value. The evidence we collected, however, from the survey sample, our interviews and the round table discussion, did throw up a number of areas where development and change could ensure HLF achieves even better value for money for its funding. Those issues are dealt with in section 9: Recommendations.

2.1 Introduction to impact and value of HLF funding for OH

The evidence from our research about the value of HLF investment in OH is positive. The following observations, based on our evidence base, provide a broad picture of the value and impact of HLF funding for OH:

2.1.1 The key message from our research is that OH is of societal importance in making sure that the historical record is representative of all voices. HLF is a unique funding source for this and has made a dramatic difference to the volume, breadth and quality of OH produced and the role of ordinary people in creating it.

“The level of activity has increased massively”. Representative from university, former co-ordinator of OHS network, East Midlands

It has also enabled heritage organisations to offer far more to community groups and projects: *“The level of advice and support we give has rocketed.”* Representative from regional sound archive, North West

2.1.2 Funding for the collecting of intangible heritage and making it accessible is not easy to find from other sources. And yet it has the capacity to deliver really valuable outcomes for individuals and communities. In this area of heritage HLF is the lead funding body in the sector.

2.1.3 The positive outcomes that are being achieved through HLF’s funding of oral history work are wide-ranging. These include heritage outcomes, particularly identifying, recording, interpreting and explaining heritage (especially that not covered by traditional heritage organisations); outcomes for individuals, particularly learning about heritage, developing new skills and volunteering time, and outcomes for communities, with a wider range of people engaging with heritage and encouraging inter-community and intergenerational dialogue. Many of these outcomes were achieved through smaller grants and by local community groups, supported by the heritage sector.

2.1.4 HLF's funding has contributed to the development of strong professional support structures; through its guidance and direction, HLF has ensured that applicants and grantees make contact with people and organisations that can help, advise and work in partnership with them. Applicants have been encouraged to see their projects within the wider heritage sector. Their projects have been brought to the notice of larger and statutory institutions. This has given both types of organisation the opportunity to work together for the wider heritage benefit. The research has explored the impact of HLF funding from both perspectives: those on the ground carrying out the projects and those supporting them, in partnerships, through training and professional advice.

2.2 Importance of OH work and HLF funding and support

The comments made by project staff and organisations taking part in the survey demonstrate the value and importance of OH work, and HLF's special role in supporting it. Common areas highlighted include:

- The crucial role that OH plays in recording the experiences of those that are not well represented in the historical record, before the opportunity to do so is lost permanently;

"HLF supported two oral history projects related to Holocaust and local community links. Without such support so much of the information and interviews would not have happened in time, without question." Project officer, small educational charity, North West whose intergenerational project recorded the experience of Holocaust survivors evacuated to the Lake District as school children.

- OH offering benefits on many levels: not just engagement, involvement, intergenerational communication but the filling of gaps in the historic record;

"It's essential as [it] encourages organisations to involve people in their heritage, it can act as a great springboard to participation as well as uncovering important 'people-focussed' historic detail." Project lead from environmental trust, Wales, whose project involved local volunteers recording the memories and stories of people living with and using a historic canal.

- OH providing a different dimension to other elements of a wider project;

"Very pleased with the emphasis placed on oral history as part of our overall project. It

introduced dimensions that we wouldn't have expected." Project lead from a project in the North West focussing on the history and impact of a town rugby club.

- The way in which HLF funding can act as organisational developmental tool for those that have not previously undertaken OH work;

"We regard HLF's continued funding for oral history, reminiscence and life story work as essential and it greatly assisted our organisation to grow its competence in undertaking oral history (broadly interpreted) and to become a resource to other organisations and interested people." Project lead from a reminiscence network organisation, Northern Ireland, which partnered with four local museums to enhance its outreach work.

A well-rounded sense of the best that OH projects can achieve can be summed up by the following quote:

"The support of the HLF for oral history had a dramatic effect on our ability to engage with the local community. We were able as a result of HLF support for two long-term oral history projects to engage directly over 600 local people with our city's museums & archives service, adding the memories of over 500 of them to the city's collections, filling gaps in representation of local ethnic and LGBT communities in the city's collections and creating bridges into the local community which we have used in further outreach work. We have also been able to share the expertise we have in oral history and outreach with other community groups and other museums and archives. The multiplier effect has been invaluable." City Museums and Records Service, South East

2.3 Overview of benefits

Evidence from the heritage professionals interviewed, and from the survey with grantees, showed clearly the benefits of HLF's funding for oral history projects and the positive outcomes created by HLF-funded projects, including:

- **Recognition of the value and consequent funding of intangible heritage.** HLF was seen as a lead funder in this aspect.

"HLF has a vital role in doing this." National library representative.

A means of explicitly engaging with and reaching diverse audiences not well represented in the official record, e.g. BAME groups and LGBT people;

“It gives community based groups that are marginalised a chance to bring their stories to the general public. To have their achievements and sacrifices recognised.” Representative from large museum service, London.

- **Opening up of oral testimony for public access.**

“It opens up public access to the materials, rather than restricting them to researchers.”

Representative from city museum service, South East

- **Increasing dialogue within communities**, including cross-cultural and intergenerational relationships, in ways that really makes a difference to community cohesion and mutual understanding and respect.

“It’s a value that’s priceless, connections between incoming and established communities.”

Representative from regional film and sound archive, South East. Commenting on the *Story of Islam in Norfolk* project.

- **Empowerment for communities.** A recognition and validation of collective experience.

“Local empowerment and awareness.” Representative from regional film and sound archive, South East.

“OH gives a voice to people who would otherwise not have one“ Representative from local museum service, oral history trainer, London.

There was also a view that OH had a special contribution to make in this regard, above and beyond other forms of heritage activity:

“It’s stronger than other sorts of heritage activity. The spoken word is very powerful especially where physical material may not be available or where the written word is not as an important part of community transference of heritage.” Education and outreach officer, large heritage service, West Midlands, commenting on a number of HLF funded projects with BAME communities in Birmingham.

Oral history is therefore seen as a way of directly engaging with communities and individuals who would not necessarily have an interest in visiting, or the motivation for engaging with, more traditional heritage organisations – it reaches beyond the walls of museums and archives into the community and acknowledges that heritage can be valued and evidenced in different ways.

- **Personal development for individuals.** The acquisition of new transferable skills, knowledge and experience that can contribute to an individual's life path and career.

"Participation and skills sharing which are transferable to other contexts, pride in ability to record experience. The outcomes are as much in the present as for posterity."

Representative from national museum service specialising in oral history, Wales

Two of our interview group had also progressed from a project officer role in an HLF funded project (without previous OH experience) to a long-term commitment to OH. One had become an AHRC funded PhD Student attached to Plymouth University and is training undergraduates in OH research. Another had become a permanent Curator of OH at a major museum service.

- **A more democratic process in the creation of history.** A number of those interviewed expressed in different ways how HLF funding was allowing non-professionals to generate heritage collections for the future, so called "*cultural democracy*".

"It contributes to what heritage and history is seen as being. There's a change in the process of making history. Who the historians and history creators are. HLF makes that happen." Representative from national museum service specialising in oral history, Wales

- **The raising of standards in terms of both process and product,** so that a professional output can be created by a community group.

"Professionalism has been added and standards have been raised. For example, in ethical issues, treating interviews as important and taking a longer-term view of what they are doing." Representative from county record office, South West

2.4 Long term benefits

All the respondents from heritage organisations could identify long-term benefits that HLF's funding had achieved for their organisations. A synopsis of these benefits includes:

- **Heritage collections enriched and developed for the future:**

"It has improved our collections development. Crucial for us. Lasting value." Representative from regional sound archive, North West

It was possible to look back at one museum's OH collections and see:

"an early burst of activity and then a slowing down, followed by an ongoing surge that coincides with the birth of HLF". Representative from national museum service specialising in oral history, Wales

- **The continuous professional and career development of individuals working in the sector:**

"It has developed my own skills." Representative from regional sound archive, East of England

"I am much more thorough in thinking about what I do and how" Representative from local museum service, oral history trainer, London

- *"We have learned more about ... working with disability organisations and we have developed new techniques in that context."* Representative from national library

- **Embedding OH into the wider work of the organisation**, for example, exhibitions:

"Oral testimony changes how you view the displays and expands the interpretation of the collections." Representative from local authority museums service, South East

- **The evolution of organisational staff structures:**

"The role we now play grew from previous HLF funded project work to be core members of staff." Representative from county archive service, Yorkshire

- **The inclusion of OH in the wider development plans of the organisation**, for example, developing new facilities:

"OH is an important part of the application for future development of the Archives and Local Studies service." Representative from local authority archive service, Scotland

3. Operating Context for HLF investment in OH

This section of the report looks at the broad context in which HLF funding for OH is situated. It aims to set the scene (both external to HLF and internally) for the detailed findings from our research that follow in later sections.

What should be underlined about the issues discussed below is that they are not all within the gift or remit of HLF to resolve. HLF may be able to have a direct effect on some; others it can only seek to influence, through partnership with the other organisations, if at all.

3.1 Strategic planning for collections: the current OH landscape

- 3.1.1 There is no single body with a responsibility for strategic development of OH in the UK. As a consequence, there is no well-articulated policy for the development of OH collections that HLF might readily use to influence and set the direction of its own funding policy for OH. This means that HLF cannot easily support an agreed national strategic approach nor apply existing agreed tactics deployed for addressing need e.g. in geographical 'cold spots' or to fill specific gaps in the record.
- 3.1.2 The network of collecting bodies for oral testimony has evolved organically, with different governance structures across local authorities, national bodies, independent charities and universities, creating patches of strength and weakness. The pattern of coverage is not consistent across the UK..
- 3.1.3 There is no readily available and comprehensive source of national data about OH collections within the UK, although the OHS publishes some information about members' projects and any extant surveys of OH material.
- 3.1.4 In the absence of clear strategic development and coherence about existing collections coverage, avenues to establish whether there is a heritage need for an HLF OH project are diverse, fragmented and can be difficult to access, increasing the likelihood of duplication in terms of subject and audience.
- 3.1.5 Into this gap, there are some nascent signs that in place of a top-down approach, an organic ground-up approach may develop and perhaps come forward as future HLF funding bids.

3.2 External development support: the current OH landscape

- 3.2.1 Since 2008, there has been a general widespread retrenchment of local authority and independent voluntary and charitable heritage organisations, in the face of budget cuts and head count freeze. For many professional heritage organisations, this has resulted in a

period of internal focus on transformation, restructuring and changed strategic priorities. There has been less emphasis on supporting external organisations and less capacity to offer advice and supportive partnerships. For community groups (whatever their focus), capital and revenue funding has also been harder to find. It is too early to make an informed analysis of whether this may lead to a reduction in the volume of OH projects coming forward for HLF support.

- 3.2.2 At a regional level within England, the closure of the Museums, Libraries and Archives Council and its regional teams has meant that there is now less strategic vision and less development support for heritage organisations. Some of these regional MLAs carried out survey work to establish the extent of OH collections (in NE, Yorkshire and SE). The replacement structure of the Arts Council has much reduced development support, both in terms of capacity and skill-mix. The structural situation in Wales and Northern Ireland has not changed significantly, and the current changes to form a national development body for museum in Scotland may improve support there in the future.
- 3.2.3 Where there has been a historic deficit in development support for OH (e.g. amongst London Borough archive and local studies services, Welsh county archive services), in the current climate the situation is not likely to change for the better in medium term. Retention of existing capacity is probably the best that can be hoped for.
- 3.2.4 In addition to the general lack of development support for museums, libraries and archives and other parts of the formal heritage sector, there may be a specific lack of knowledge, understanding and skills related to OH that can be accessed at the local level. This is an obvious prerequisite to providing advice to external organisations. HLF recommends OH projects to seek advice from a local expert. In some cases, that source of advice is now absent, unavailable or restricted.
- 3.2.5 Our interviewees made it clear that, where development support is strong and effective, capacity is the key limiting factor: "*not enough hours in the day*". Some heritage collecting bodies that offer support to community groups were interested in exploring whether they could fulfil a more formal role of advice givers for HLF. This could allow them to generate income, invest in further capacity and offer more development support.
- 3.2.6 The current pattern of development support is not consistent. Relationships between the professional heritage bodies and the HLF development teams range from excellent and really productive, to a little confused, where communication could be better. This tends to be a reflection of the stability of staff in post on both sides, clarity about the role of the professional heritage body concerned, and the degree of capacity that both sides can offer to cement the relationship fully.

3.2.7 Provision of advice as part of the core work of heritage organisations is currently extended by the OHS and its members. The HLF OH guidance is based on the OHS and British Library guidance. The OHS trains and accredits trainers to whom HLF signposts grantees. In addition to formal training, expertise and local, regional, national and international knowledge is provided by OHS networkers. However, they do not usually currently play a role in mentoring and improving the quality of projects on behalf of HLF. Any support that is provided is most likely to occur organically (i.e. not through any formal relationship with HLF) where those trainers also hold paid positions as staff within a heritage organisation that collects OH deposits.

3.3 External development support: characteristics of success

Where development support for OH projects is effective (e.g. West Yorkshire Archive Service, Birmingham Heritage and Archives, Eastside Community Heritage, London) we observed the following common threads:

- 3.3.1 At least one permanent member of staff in an established heritage organisation, with clear organisational remit to ensure future collections relevance through supporting community organisations to conduct OH and deposit their collections.
- 3.3.2 Professional highly skilled staff members, in a stable employment position, with a significant period in post, building up trusted relationships with community groups and “gatekeeper” organisations.
- 3.3.3 Support for the application of tried and tested methodologies and processes. These go beyond the training and technical requirements of OH, to include community engagement and working with different audiences. This leads to better standards of practice and a more successful process/product combination of quality OH recordings and effective interaction with communities.
- 3.3.4 A well developed, focused and clear relationship with the relevant HLF team.
- 3.3.5 Usually found in areas with highly diverse populations, where there is a prerogative to ensure heritage organisations hold collections representative of the communities they are there to serve.
- 3.3.6 Such support is often the result of a long-term approach (up to 10 years) that began with a HLF funded project. This then created evidence of need and impact, from which to argue for a permanent member of staff to develop the function further.

Clearly HLF might wish to see this kind of support replicated more widely. However, it should be underlined that in the current period of retrenchment, it is much more difficult, although just as necessary, for heritage organisations to start to implement such a long-term strategy because it

appears to be reliant on a broad corporate environment of strategic planning and innovation.

3.4 HLF funded OH projects: specific issues of process, quality and legacy

3.4.1 Some grantees do not have a clear understanding of what OH is or can be, as opposed either to reminiscence and social memory-based sessions or to the vox pops and brief web cam interviews used, for example, as a form of interpretation or evaluation. Rather there may be a simplistic view that OH happens whenever people are talking about their past. The implications of this can be seen in the responses of more experienced heritage professionals:

“Some projects have the potential to offer some amazing material but the interviews are too short and not in depth enough.” Representative from community heritage collecting organisation, London.

3.4.2 There was a consensus among those supporting community groups that the professional support required to involve volunteers successfully was usually significantly underestimated and sometimes compromised to resource other elements of a project. This was the most commonly articulated concern of our interview group. In some HLF funded projects it is assumed that volunteers from any background will be competent to carry out archival quality interviews following a single day’s training.

3.4.3 A number of interviewees expressed the view that the best HLF funded OH projects worked from the basis that a core of recordings, conducted by appropriately trained and interested people, was an essential prerequisite of undertaking various kinds of follow-on activity with different audiences. Ideally the oral testimony should act as the source inspiration for other activities and should be conducted early on in the project. This was the preferred process of project delivery.

3.4.4 There was also a view that some projects carrying out intergenerational work expected to deposit all their recorded outputs with a local heritage organisation, including the early interview attempts of school-age children. While there may be some value in this, as a general rule, it will lead to collection and storage costs being allocated to material that has too little detail or sophistication to add to the historic record.

- 3.4.5 The technical quality of recordings is an obvious process issue that affects legacy. However legacy also depends on the quality and presence of transcriptions, indexing, documentation and signed transfer of rights and permissions for access i.e. the information that surrounds the interview. Our survey found that not all projects undertake this work and therefore the OH process and deposit is incomplete.
- 3.4.6 The legacy potential of HLF OH projects is also dependent upon the capacity, skills and resources of the organisation with which the material is deposited. In effect, the project hands over control of this part of the legacy with the deposit.
- 3.4.7 There is sometimes insufficient consideration of the resources required to generate a legacy for the material produced e.g. website hosting, marketing and promotional activity.
- 3.4.8 There is clear evidence that some projects tagged in HLF records as OH are driven more by community engagement activities. OH work is seen as a vehicle for this and there is less emphasis on ensuring the quality of the recordings and their safe deposit for future access. This is sometimes true even when one of the stated motivations for the project was to influence the historical record. For these projects, producing OH recordings to be accessed, assessed and analysed in the future as part of our collective understanding of history is not of primary importance.
- 3.4.9 Our interview group thought that it might not be appropriate to encourage all projects with potential OH elements to aim for archive quality primary outputs. In such circumstances, a project with an explicit community engagement focus may fulfil HLF's funding criteria adequately through delivering other activities.
- 3.4.10 At present, there seems to be no agreed model of the way OH projects funded by HLF should access the external OH expertise needed to develop the relevant skills. The project's budget may allocate funds to "training" but this is often interpreted by applicants in its narrowest sense, i.e. a one-off didactic session or workshop. Ongoing skills development could be offered using an expert advisor scheme or a more communal peer support process, in which projects are enabled to share experience and build on each other's work. There is no current system in place for either model.
- 3.4.11 Duplication of theme is seen by some to be a potential issue, more usually related to the

representation of diverse community experience in a large urban setting.

As one interviewee explained: *“I trained 2 youth groups in Tottenham in the same building within 2 weeks of each other. They were up to much the same thing but not aware of each other”*. Representative from local museum service, oral history trainer, London

3.5 HLF funded OH projects: issues common with other HLF projects

Some of the issues identified as part of this research are common to other projects:

- 3.5.1 In common with other Your Heritage projects, a very high level of project development support is required as most grantees from this programme are community groups and first time applicants to HLF – often with limited capacity and no in-house heritage expertise.
- 3.5.2 There is often a general underestimation by projects of the requirements of a successful project in terms of capacity, time, resources, training, volunteer skills development and the amount of professional support required.
- 3.5.3 Project success is also often dependent upon the skills, capabilities and continuity of project staff who leave at the end of the project or just before completion in search of other work.

3.6 Internal HLF environment

- 3.6.1 There is a perception that the quality of development support, assessment and monitoring varies within different HLF regional and home country teams. The stability of the teams is seen as key to the quality of the service received by grantees undertaking OH work.
- 3.6.2 It was considered that HLF officers generally had a good understanding of OH projects, were familiar with HLF's own guidance and could advise applicants accordingly. It is suggested, however, that there remain some internal training needs in terms of fully understanding the OH processes and related training and skills development, assessing project costs, assessing the realism of plans for contact and engagement with target audience groups.
- 3.6.3 Both external commentators and the HLF development managers interviewed were concerned that HLF has a poor corporate memory. It does not have the structures and processes in place to make the most of the information it owns about previous projects. Teams do not have sufficient tools to hand to help applicants learn from what HLF has funded before (often being reliant on individuals' recall). This potentially exacerbates

problems of duplication of theme, repeating past mistakes and reinventing the wheel.

- 3.6.4 Some interviewees felt that HLF assessment and monitoring of projects with an OH element under the Your Heritage programme was not sufficiently rigorous. This was especially mentioned in terms of checking that project outputs were fully completed. This was seen as affecting deposit and documentation in particular, and hence future accessibility and impact.
- 3.6.5 There was a perception that there are relatively few mentors on the HLF register with specific OH expertise. The relationship between the mentor role and that of the OHS trainers and networkers is worthy of clarification.
- 3.6.6 There was some minor concern that HLF's insistency on a clarity of theme and prescribed project parameters at the application stage, mitigated against some of the value of the OH interview process, in that in other circumstances, collecting testimony can be more responsive to the interviewees, following different avenues of exploration of experience.
- 3.6.7 Some interviewees felt there was a lack of understanding in the HLF Operations teams that OH projects are creating heritage that will have long-term collections management and access implications for the owning organisation.
- 3.6.8 There is a perception that the people with responsibility for setting HLF policy and those with responsibility for implementing that policy are very different, and that the relationship between the two is important if HLF is to fulfil its desired outcomes for the OH projects it funds.
- 3.6.9 A number of interviewees felt that HLF does not place sufficient emphasis on the reuse of equipment purchases for OH projects, which could be recycled for several projects.
- 3.6.10 HLF's position as stated in its Guidance for Digital Projects is that all material generated through its funding should be available through the Creative Commons licence. However, a number of OHS trainers were concerned that the licence could not be made to work effectively for oral testimony. This is because the very personal nature of some oral history and the access permissions associated with it, may be difficult to reconcile with the general access principle of Creative Commons and the allowance for repurposing of material by the end user over which the individual interviewee or creating organisation has little control.

4. Findings: Definition of OH

Although our research did not ask either the grantees that completed our survey nor members of our interview group to define what OH is, it became apparent that the definition is problematic. There is no consensus agreement on a definition, description or identification.

Many of those from the OHS and heritage organisations advising grantees expressed the view that groups they had advised and trained often started out with an ill-formed view of what OH is and with little idea of the processes and standards to pursue in its execution:

“Often they don’t know what it [OH] is.” Representative from regional sound archive, East of England.

“Contact is usually to develop project properly, the mechanics, processes of oral history as not always aware of what it [OH] entails. Often challenged by the prospect of what they need to do.” Representative from national museums service, oral history specialist, Wales.

This view was supported by HLF staff:

“Organisations often have no previous experience of OH, do not understand fully what it is”. HLF development manager.

The same respondents often mentioned that, although not falling within the parameters of OH, conducting vox pops and mini interviews had a value of their own and could be more appropriate for some HLF applicants seeking to generate direct quotations to support their project.

We can illustrate this by the results from our survey sample about the volume of OH recordings undertaken. The average number of recordings was 35 from a sample of 83 useful responses. However, the stated range of survey results was from 1 to 586. Looking behind the data, we see this is an indication that a minority of respondents (estimated as 15 of 83) may have been reporting on outputs that were not strictly speaking OH recordings but were in fact other kinds of less structured recorded speech. Although we need to caveat this by stating that some of the highest volumes of recordings were produced by well-established heritage organisations with known competency in conducting OH (e.g. Eastside Community Heritage, Portsmouth Museums and Records Service).

The current HLF guidance note includes a section which aims to help define OH *“Section 3: What is OH?”* which is very helpful and seeks to make clear the value of OH and critically the point that:

“OH is about facts but it is also about memories and opinions which are open to debate, analysis, evaluation and interpretation.”

That is to say that the ability to access and assess the validity of the OH recordings, as one piece of the historical record, is an essential part of its definition. For this to happen, the quality of the process of generating the recordings, and their subsequent transcription and organisation to facilitate access by others, is central.

Whilst it is not HLF’s remit to determine a definition it could work towards making its own guidance clearer in terms of giving a greater practical steer on what is and is not OH. We would suggest this needs to allude to:

- The purpose of the recordings;
- The length and depth of the interviews undertaken;
- The structure of the interviews;
- The depth of questioning and training of interviewers;
- Plans to make the recordings available to the public through deposit with associated documentation, indexing and transcription, publication online;
- The relationship between OH and reminiscence;
- The exclusion of unstructured short interviews, talking heads or vox pops but a recognition that their production may still have a value especially in terms of the process of engagement.

5. Findings: Project Development

Our research sought to identify some of the factors that affected the scope and quality of the development of projects funded by HLF, prior to an award. We particularly looked at why organisations wanted to undertake OH, what they wanted to focus on, how they went about developing their project, whom they approached for advice and support and what kind of help was sought. We also explored the views of those helping them about their role in offering support.

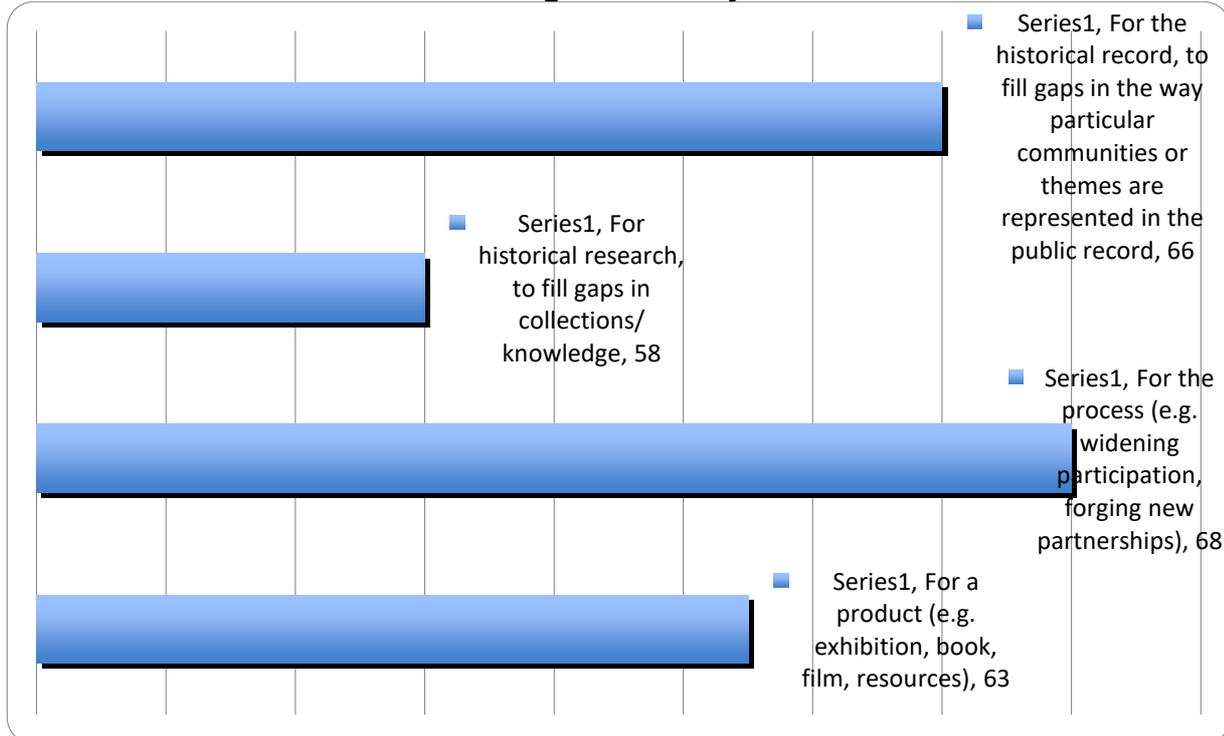
5.1 Motivations for undertaking OH

Looking across the range of projects undertaken with OH, it would appear that OH projects are undertaken for a variety of purposes. The four main reasons identified by the authors being:

- For the historical record, to fill gaps in the way particular communities or themes are represented in the public record
- For the historical research, to fill gaps in collections and knowledge that can be accessed in the future by researchers
- For the process of involving people in projects to increase their participation in, and learning from their heritage, using OH as a vehicle for engagement
- For the product, for the value of what can be produced from the OH as outputs, such as exhibitions, online content, books etc.

HLF is interested in the extent to which projects might focus on one or more of these primary motivations and whether there are identifiable trends in the reasons why OH is undertaken.

The on line survey therefore asked respondents to indicate their reasons for undertaking the OH work. The results from the survey are given in Table 4.

Table 4: Motivations for undertaking oral history

The majority of the 88 respondents who answered this question, ticked *all four* given motivations of product, process, historical research and the historical record, but there was a *slightly higher* response for the process (68) and historical record (66) than for the product (63) or research (58). This could lead to the conclusion, supported by the predominance of the theme of a particular group of people or community (and reflected in remarks made by our interview group which can be found at 5.2 below), that for some projects engaging with specific people and ensuring the inclusion of their experience with the official record was more important than considerations of use of the record once created.

A good sense of the motivation for specifically undertaking OH, which captures the aims of many of the survey sample projects, is:

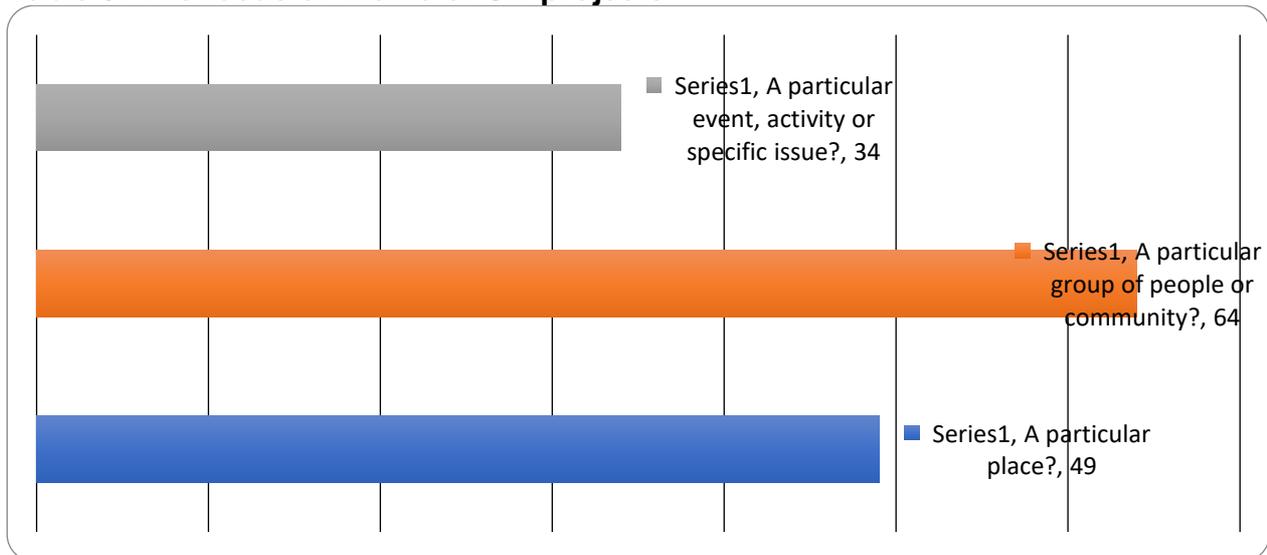
“Rotherham was celebrated across the planet as a steel town, before the sense of everything that meant vanished into history, we wanted to invite as many people as possible to reach down into their minds, hearts and bones for the words, stories and melodies that might give us the feel of that great, big, rolling, rumbumptious, still echoing in the distance, songs of steel” Project officer, *Songs of Steel*, Rotherham Arts and Local Studies (see accompanying case study)

5.2 The theme of projects

From the observations of HLF staff and the authors’ review of basic information about the 197-strong sample provided, HLF funded OH projects tend to divide into three main themes that form the focus of the interviews and subsequent outputs based upon them. We identified these as being primarily about a specific event or activity (e.g. anniversaries), a particular group of people or community (e.g. LGBT people) or a particular geographical place.

The survey of 90 HLF projects asked directly about the theme of the projects undertaken and the results are shown in Table 5.

Table 5: The focus or theme of OH projects



Of the 88 responses to this question, there were more projects focussed on a particular group of people (64) than a place (49) or an event/activity (34) which, taken with the analysis of 2.1 above about motivation, suggests that OH recording is more regularly being used to fill gaps in the historical record that relate to the experiences of specific underrepresented audiences (e.g. Iranian Forum, Rwandan Community in the UK, Chinese Mental Health Association, Freshwinds and River Cultures). Such a conclusion was also borne out by the experience of our interview group:

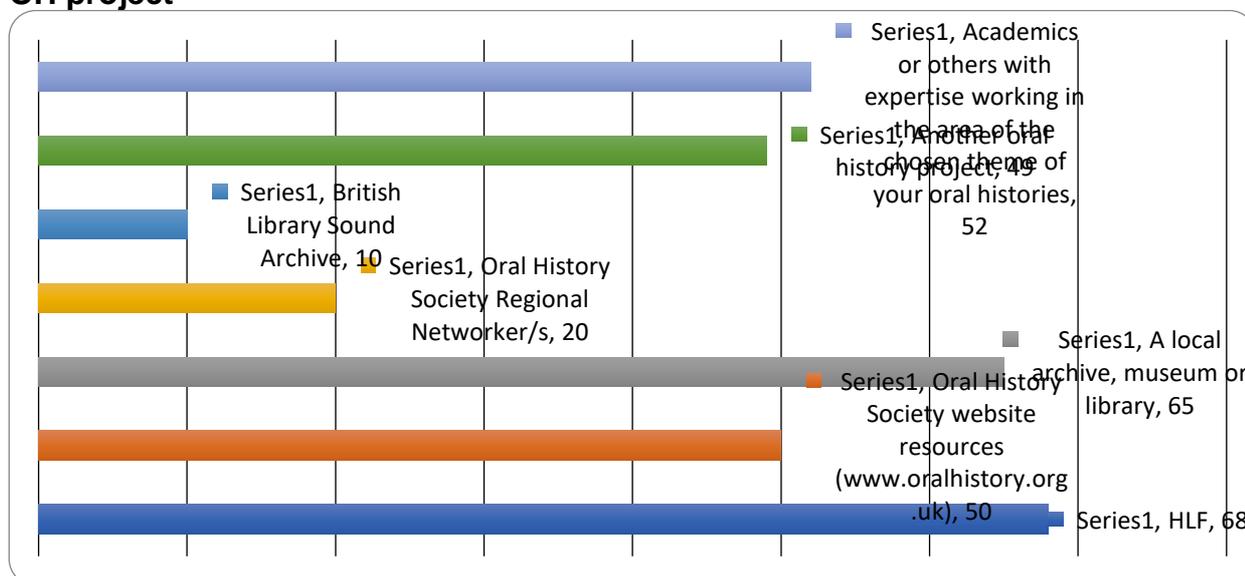
“OH is special as it is one of few ways of putting the LGBT group experience on record as it has been lived but not documented (for obvious reasons). OH is a means to redress the balance in evidence.” Representative from HLF funded community organisation, South West

5.3 Sources of advice and support in developing OH projects

The survey sample of 90 responses revealed that most organisations had consulted with a variety of established sources of advice and support in planning their projects prior to submission to HLF

as shown in Table 6. From the data we could not establish a discernible pattern in the kinds of organisations that had not sought any advice or support.

Table 6: Sources of advice and support which grantees sought in developing their OH project



HLF was the main source of advice (68 of 90) closely followed by a local established heritage organisation such as a museum, library or archive (65). More projects had consulted with academics and other experts than with the OHS. Over half of the sample had consulted with another OH project, implying that a degree of peer learning is taking place, outside more formal sources of advice. The overall picture shows that the majority of projects had consulted all the suggested bodies except the OHS networkers and the British Library Sound Archive.

Where projects stated they had consulted other bodies, those cited did, in fact, relate to one of the categories supplied in the given list, such as an archive or library. Age Exchange, Imperial War Museum, North West Film Archive and former Regional Museum Development Officers were mentioned.

The majority of respondents (66 of 90) had made use of the HLF guidance note *Thinking about Oral History* and the average rating for its usefulness was nearly 3.75 out of a maximum of 5, indicating that it has had a high impact on those applicants who read it and that it contributed significantly to the quality of their applications. The anecdotal evidence from heritage organisations listed as offering support in the guidance note (some of which were members of our interview group) suggests that it is widely used, because of the amount of referrals that flow from it.

5.4 The nature of advice and support offered and sought

The content in this section is derived from an analysis of the responses from the 19 people in our interview group that offer development support to OH projects (external to that provided internally by HLF) across the UK.

5.4.1 Advice

The interviews looked at advice given to projects by contacts with knowledge of OH work and relevant expertise. This included staff of university departments, museums, libraries, archives, community organisations and freelance individuals. This diversity of contacts, backed by the regional network of the OHS, makes up a broad web of support and a deep pool of expertise from which people new to OH can benefit.

Advice and support currently covered by this group included:

- **Funding**

Most respondents (15 of 19) gave advice on funding (including from HLF), but within this group some had reservations, for example, two would only do this in a partnership situation and one was not confident to do more than refer people to the published guidelines.

- **Practical: choosing, buying and using equipment**

All respondents gave advice on this and for many grantees, this was one of the main reasons for seeking advice.

“They are most often asking about equipment and training. Sometimes they are not aware that training needs to cover more than how to use the equipment.” Representative from local museum service, South East

- **Archiving and documentation**

All respondents gave advice on these aspects.

“Archiving is always mentioned and recommended...It is important for the Record Office as it will be deposited.” Representative from county archive service, South West

One respondent had found that groups had not always considered this early enough in the application process:

“They rarely seem to have thought before coming, about where the interviews would be deposited at the end of the project.” Representative from local museum service, South East

- **Other areas of advice**

About half (11 of 19) respondents said they gave further advice. Areas mentioned specifically were: project management (3); editing and production of outputs (3); working with volunteers (1) and community engagement (1).

Over a third of these respondents (7 of 19) mentioned concerns that grantees were not always aware of the amount or kind of advice and support they needed.

“They ask for help with funding applications, costs of training and equipment. They need help with working with volunteers, as opposed to employed workers. They need coaching and 1-1 support.” Self employed, oral historian, London

Two people mentioned that it can be difficult to estimate the level of support needed by a project at the beginning of the process.

“It can be down to the skills and experience of a few individuals. This is not predictable by type of project or even knowing who individuals are in project teams. Who would guess that a boxing history project would have an excellent administrator or a former lawyer would have the sensitivities to coordinate a tricky project with amputees and their former medical carers?” OHS Committee member

One comment illustrates the breadth and depth of help that might be needed:

“Usually the reason [for seeking advice] is [that they] need help to translate aspirations into reality.” Education and outreach officer, large heritage service, West Midlands

5.4.2 Training

Training is offered at a wide range of different levels:

- Two-hour basic training (e.g. offered by a Record Office as part of their core work)
- OHS-accredited training (usually 1-3 days)
- Longer term mentoring, coaching and skills development, including interviewing techniques, outreach and community engagement, production of outputs.

Groups booking training through the OHS and BL pay a freelance trainer at a set fee. This is tailored training delivered to the staff and volunteers involved in the project. The trainer is paid the whole fee directly and there is no overhead paid to the BL or the OHS for the advertising or administering of this.

Those providing training for skills development would usually offer more than one formal training day. For example, it was suggested that a minimum should be two days with the same trainer, especially if the project team does not have the skills needed within the group already.

“For training they need: two days’ minimum, to cover: how to record interviews; follow-up once interviewing has got under way (to improve and develop skills); advice on dealing with material following interview, transcribing, archiving etc.

They need guidelines on building a realistic budget, including recognised costs (such as equipment) but also some they are less likely to include (such as professional transcription, at least for the earliest interviews, to assist with their skill development).

They need more advice on ways of engaging with the community; finding people to be involved with the project.

They need guidelines on how to catalogue and archive their interviews.” Self employed oral historian, South East

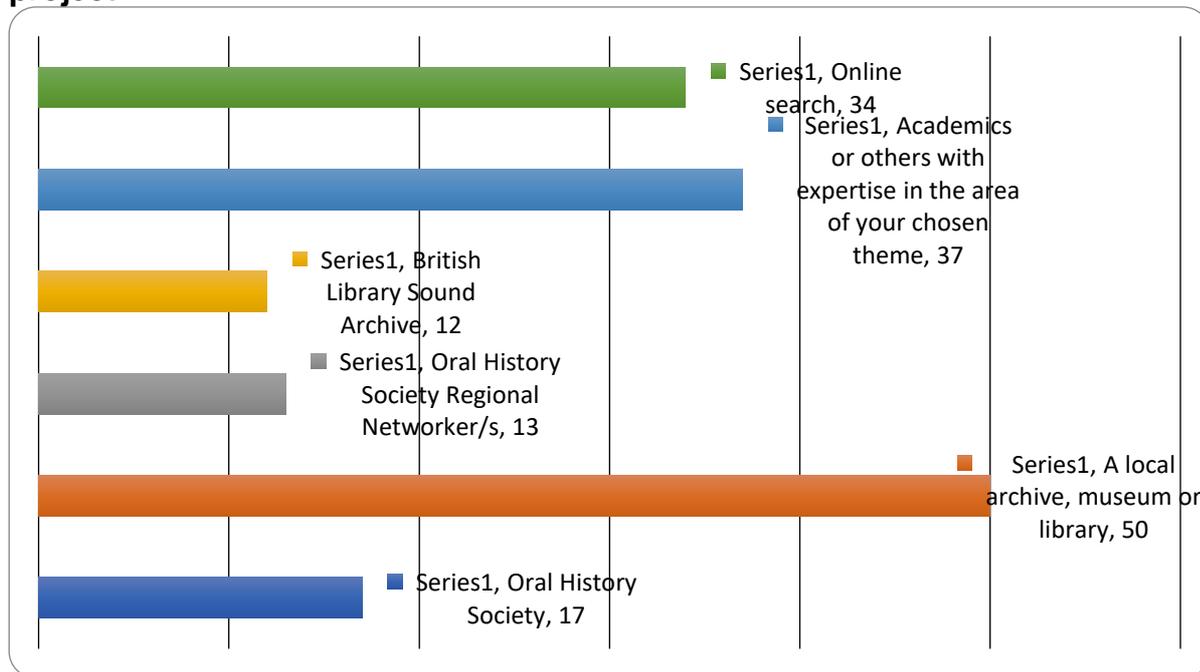
There were also examples of longer input through the life of the project by freelance experts, such as one project that allocated six days, including formal training elements, advice on reminiscence and digital archiving. This was needed because of the low capacity of the organisation, newly appointed staff and a recognition of the skills that needed to be developed.

5.4.3 Research support

In the absence of a national strategic collecting strategy for OH, and a current mapping of existing collections to which HLF can refer applicants, a question was included in the survey to discover whether grantees researched OH work already carried out, prior to undertaking their project. Two thirds of respondents had sought to some degree to establish what existed prior to their project. This is perhaps not as high a percentage as HLF should expect, as researching other collections forms part of the good practice detailed in the guidance *Thinking about Oral History*.

When asked with which organisations they had consulted from a suggested list, the response was as given in Table 7:

Table 7: Organisations which grantees consulted with to research the theme of their project



The frequency with which organisations were consulted correlates closely with the responses to the primary sources of advice and support, perhaps implying that the applicants made one contact for both advice and research. Hence, a local heritage organisation, an academic or expert was the most commonly consulted and the OHS, its networkers and the BL were significantly less regularly consulted. Online searching was important (34 of 60) but not as critical as a heritage organisation (50 of 60) or experts (37 of 60). Others mentioned included the European Reminiscence Network, regional sound and film archives, and the BBC.

However, the response rate to this question was significantly lower than for some other questions (60 out of 90). This might imply that a good proportion of projects did not make evidenced efforts to establish whether the focus of their project was likely to result in duplication with existing sources, or add unique value to the historical record.

5.5 The scale of advice and support sought

In terms of assessing the scale of advice and support which organisations are offering to HLF funded projects, it needs to be borne in mind that some requests for support are for projects that may not be strictly undertaking OH to a standard recognised by professionals, and relates to difficulties over the definition of OH rehearsed in section 3 above.

We asked those of our interview group that offer support for OH projects to estimate the volume of contact they had had with different organisations in the last year. The number of projects that had received advice and support varied considerably, from one partnership project to 300 contacts, in the case of the British Library. Extrapolating from the research, a specialist sound archive might have contact with 75 groups a year, individual OHS trainers between 10-40, a county record office 10-20, a large museum service 5-10 and a small museum service one or two. There is not a direct correlation with the number of staff or size of an organisation, but their capacity to support others carrying out OH is likely to be linked to the relative importance this has within their plans and work programmes.

6. Findings: Sustainability of Outputs

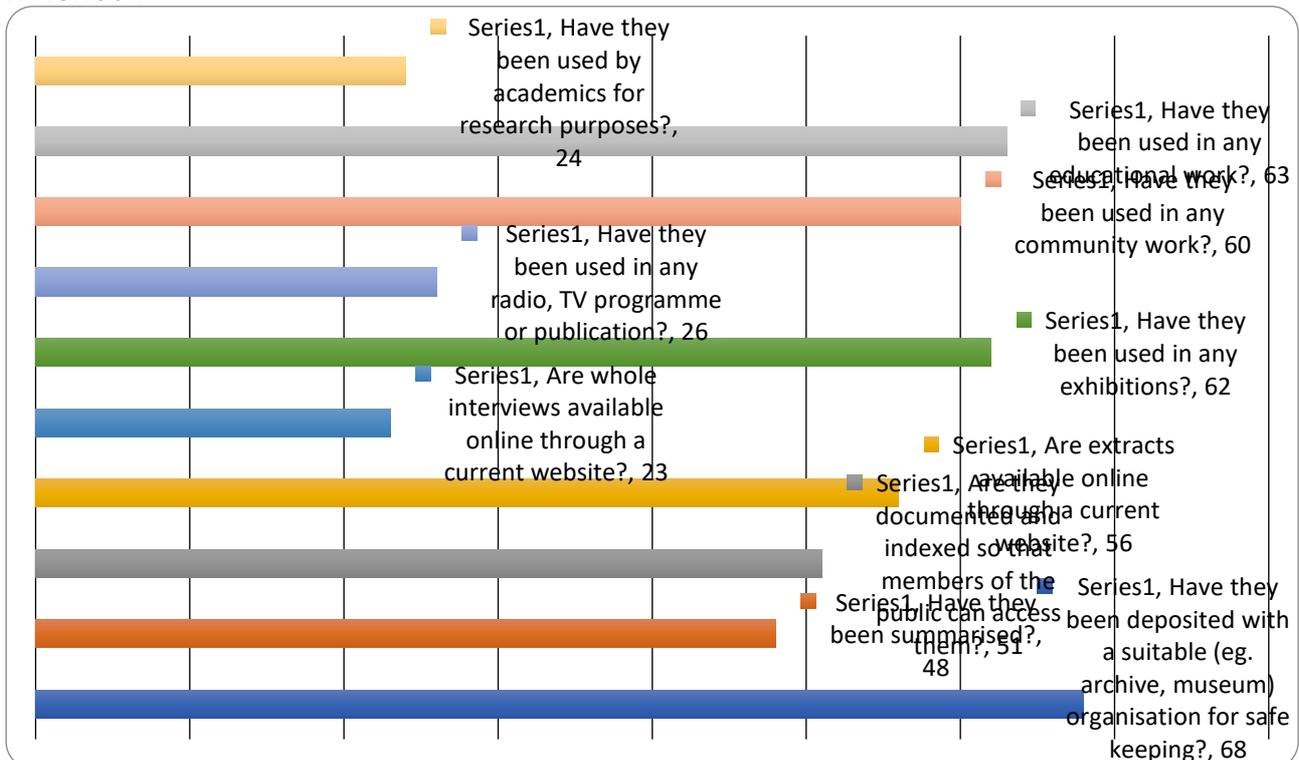
The research aimed to find out the extent to which the OH recordings from projects were being used (and are in a position to be used in the future) to support learning and study, in terms of:

- Whether the recordings had been deposited with a heritage organisation for long term preservation and access as part of that organisation’s collections management strategy;
- Whether the recordings had been documented, indexed and summarised to ensure that the essential descriptive information about them was in place to make public access possible;
- Whether access to the recordings had been made available through their use in exhibitions, community work, films and online;
- Whether projects were aware that the recordings had been subsequently used by academics for research purposes;
- The views of professional heritage organisations and individuals on the quality of the primary recordings and secondary products resulting from them.

6.1 The OH recordings after project completion

The survey asked what was happening to the OH recordings now that the project was over. The results for those responding “yes” to one or more category is shown in Table 8.

Table 8: What is happening to the OH recordings produced now that the project is finished?



6.1.1 The deposit of recordings

The majority of the 85 respondents to the survey who answered this question had deposited the recordings with a heritage organisation for safekeeping (68) but certainly not all. Our interviewees were also asked to estimate the percentage of projects they had advised that had deposited their recordings safely. The rate of deposit of 75% estimated by heritage professionals correlates closely with that stated by projects (although 6 of the interviewees were not able to comment through lack of knowledge).

Only four grantees under the Heritage Grants programme did not state they had deposited their material with a heritage collecting organisation. Of the 22 grantees who did not state they had deposited their recordings, 18 had undertaken Your Heritage projects. Many were community groups whose main aim was not heritage focused or other kinds of organisations that may have less connection to mainstream heritage collecting bodies, such as schools, environmental trusts and small locally based charities. There were no museum, archive or library services that had not stated they had deposited the material created, perhaps implying that such organisations can be expected to understand the requirements of depositing better than say land and biodiversity applicants, which were 5 of the 22.

The general view of the interview group was that the numbers and standards of deposit had improved over the last ten years. This was seen as at least partly due to the importance which the HLF guidance note attaches to consideration of deposit with a suitable institution. A number of those interviewed wanted to make clear that the level of deposit of OH recordings from HLF funded projects was significantly higher than those generated by other sources. In fact, deposit had improved since the inception of HLF compared to before:

“It [deposit] has improved enormously from 15 years ago. Now between 80-90%.” Representative from local museum service, oral history trainer, London and South East

The attitude of the heritage organisations to pursuing deposit varied significantly. Some such as Birmingham Heritage and Archives Service, Eastside Community Heritage and West Yorkshire Archive Service are proactive in encouraging and supporting community organisations to deposit:

“We provide [a] very clear idea of our expectations from [the] partnership and the tools, guidance and support to make it happen as we want. We emphasise the importance of making sure that today’s hard work is not lost in future.” Education and outreach officer, large heritage service, West Midlands

This is done within the boundaries of a clear collecting policy that places an emphasis upon filling gaps in the records from underrepresented communities and within well-defined and developed support structures for external groups. It is part of these organisations’ strategic approach. Others such as the Museum of London take a different approach. They fulfil their collecting policy through internally defined partnership projects, rarely agreeing to house the products of externally

generated projects by other organisations, even though the museum undertakes an informal advisory role.

For the majority of heritage organisations that act as depositing institutions, the picture seems to be of a more passive stance. Rarely is there capacity to follow up on community-generated projects where previously advice has been given but no deposit made.

6.1.2 Documentation of recordings

A significantly smaller number of projects than had deposited their recordings had summarised (48 out of 90) and documented and indexed them properly (51 out of 90) to allow meaningful public access. This raises the question of whether some project recordings may be properly housed but in reality inaccessible without further work. It was an issue which several of those interviewed from the collecting institutions highlighted as critical to long term sustainability. If the interviews are not indexed, summarised and at least partially transcribed, with appropriate permissions, according to the needs of the organisation accepting deposit, they can be rejected, until such time as the surrounding documentation is in place. Alternatively, they may join a backlog, waiting for staff capacity to organise the material correctly so that it can be made available. Some of our interview group were at pains to point out that the nature of OH recordings made the associated documentation issues even more important than for other heritage collections (from which information can be derived through visual interpretation or by reading the primary source even if documentation is poor), although this is an area which HLF does not always directly monitor:

“The archiving process is key to legacy, especially transcription which will outlast any problems in format obsolescence and is an academic’s preferred mode of access. It takes 2 days to do a decent transcription.” Representative of a community heritage collecting organisation, London.

6.1.3 Secondary Use

More than half the survey respondents (56 out of 90) offered online access to the extracts from recordings and perhaps a larger minority than anticipated provided online access to whole interviews (23 out of 90). Some examples of these, that give a flavour of the diversity of online content created, are:

- *Foundling Lives*, Foundling Museum <http://foundlingvoices.foundlingmuseum.org.uk/>;
- *From Auschwitz to Ambleside*, Another Space <http://www.anotherspace.org.uk/a2a/>;
- *The Birmingham HIV Living Archive Project*, Freshwinds <http://www.birminghamlivingarchive.org.uk/and>;
- *London China Town Oral History Project*, Chinese Mental Health Association

<http://www.cmhaoralhistory.co.uk/index.html>;

There was a very strong correlation between those organisations that had not deposited with a collecting institution and those that were not offering access to the oral histories online.

Organisations that did not offer access online were predominately community and special interest groups that had been in receipt of a Your Heritage grant but not exclusively so. A few local museums and archives also featured in this group, though it may have been that case that online access was never stated as a project aim in these examples.

The number of respondents stating that the recordings were being used in exhibitions (62), community work (60) and educational work (63) was very similar, which may be a reflection of the fact that the majority of projects were undertaken by non-heritage organisations with a particular focus on engagement, inclusion and community development products and processes.

6.1.4 Use in academic research and teaching

HLF OH guidance mentions the value of OH recordings as a potential source for research and study. It was therefore interesting to see that only 24 respondents stated that the recordings were being used by academics for research, despite the fact that earlier questions in the survey implied that there was a reasonably high level of contact between projects and experts in the field, at the point when projects were being developed and scoped. The implication is that most project leads are not aware of whether the oral histories their project created are being used in this way. This may be for two reasons. Firstly, they may not have continuing regular contact with the partner institution with whom the recordings were deposited; hence they are unable to comment on how they are being accessed for research purposes. Secondly, given that the projects were less motivated by research reasons in the first place (see 2.3), they may be less inclined to follow up on this area in the longer term, rather than other forms of use, such as repurposing in exhibitions.

The kinds of organisations that tended to report that the collections were being used for study purposes usually had a connection to a university (e.g. East Midlands Oral History Archive, University of Leicester) or were delivered by an institution with a study focus (e.g. the Planned Environment Therapy Archive and Study Centre).

The general view from our interview group was that the level of use of deposited collections by academics, students, other researchers and members of the public was not as high as they would have hoped. This included OH recordings that were fully integrated into the professional collections management and access arrangements of the retaining heritage organisation. Where examples were given of well-studied collections, these often had an ongoing connection to a programme of higher education study. For example, the Plymouth Pride Forum archive held by Plymouth and West Devon Record Office is used in undergraduate programmes at Plymouth University and the

Evelyn Oldfield project interviews housed by the Museum of London resource part of the community history teaching of London Metropolitan University.

As one of the interviewees explained:

“... increasing numbers of undergraduates come to University expecting an oral history element following their earlier experiences in the community. People aged 18-25 are more interested now and they often have gained some understanding of intangible heritage and oral history ... They also have a greater appreciation of the breadth of history and not the old fashioned view that history is simply about the rich and powerful.” OHS Committee member

6.2 Quality of project outputs

6.2.1 Primary outputs

Our interviewees were asked to comment from their experience on the quality of the OH recordings produced by projects. The most useful responses were gained from those working in heritage institutions that acted as depositing organisations. (Some of those interviewed felt less able to comment as their role was advisory and mainly at the beginning of the project.)

There was consensus that quality varied and that it was dangerous to generalise about quality being linked to the scale of the grantee organisation or its previous heritage experience.

Interviewees cited anonymous examples that contradicted this assumption: both of small, non-heritage focused community groups creating excellent quality recordings and of established heritage organisations undertaking some poor quality work:

“There is no correlation between the kinds of organisations doing the project, nor the size of the project, and the quality of the OH recordings or the other outputs. It’s more to do with the degree to which the process has been thought through”. Representative from county archive service, Yorkshire

High quality interviews were seen as essential for future research and reuse. Many interviewees stressed that HLF grantees are creating heritage assets of potential long-term value. They are collections:

“These are historical artefacts that we are collecting here.” Oral history trainer, London and South East. Examples of projects by our interview group which had produced good quality recordings included:

- *Songs of Steel*, Rotherham Arts and Local Studies and Archive Service
<http://www.songsofsteel.com/> (see accompanying case study)
- *Italians in Wales*, ENAIP <http://www.enaip.org.uk/> (see accompanying case study);
Kingston Aviation Centenary Project

- The Hawker's Association <http://www.kingstonaviation.org/>; and
- *Going to the Pictures*, Plaza Community Cinema, Sefton <http://goingtothepictures.org.uk/>.

Interestingly, those interviewed tended to comment on “quality” in terms of the technical competency of the recordings and the completeness or otherwise of the surrounding documentation. Comments often related to the practical details that affect sound quality, such as incorrect equipment, background noise, poorly positioned microphones and digital recording devices, variances in recording volumes. This was often seen as related to whether interviews were conducted by professional staff or volunteers, and the quality and amount of training undertaken by the latter:

“In our partnership projects the sound quality has been good as we have good equipment and well-trained volunteers. Occasionally a volunteer will still ‘do their own thing’.” Representative from community heritage collecting organisation, London

As noted previously, also important was whether the training allowed for some follow up once interviewees had started to conduct recordings as part of an on-going process to ensure quality:

“[Technical quality is good] only if this is built into the project from the beginning. If there is three days for training, this will include follow-up, reflecting back, listening to early interviews.” Self employed oral historian.

There was less judgment offered on “quality” in terms of the value of the material to future study or as an effective testimony to experience. Partly this was due to the fact that those interviewed had not had time to listen fully to all of the material deposited. However some interesting observations were made. There was a sense that the need for an HLF project to be focused (as suggested in the guidance) could sometimes result in a narrow concentration on one limited theme, such that a more organic and evolving approach to interviewing, for example, to take a ‘whole life’ approach was not possible. Sometimes the scope of interviews was felt to be too constrained, not allowing for more discursive elements of personal experience to emerge:

“HLF would benefit from a broader understanding of OH esp [sic] its relationship to ethnology and the use of narrative. Some recordings may not be historically accurate but have a value in wider dialogue.” Representative from national museum service, Northern Ireland

An example cited of good quality content likely to be of future historical value was the Kingston Aviation Centenary Project for the reasons that:

[It was] very impressively organised with a sound project plan allowing for sufficient training throughout the project. It's succeeded in recording experience of 100 years of aviation industry. Good mixture of insider/outsider interviews with contextual experts and former industry workers. And it involved a lot of local people” Representative from local museum service, oral history trainer, London and South East.

The broad issues affecting the quality of the OH recordings are explored further in section 3, above.

6.2.2 Secondary outputs

Many of those interviewed did not have a clear view of the quality of the secondary outputs created (such as exhibitions) nor the extent of their reuse. This seemed to be as a result of capacity constraints which meant that, unless the interviewee's organisation was a formal partner in a project, there was not time in their work programme to attend openings, launches, talks etc.

Those able to comment made similar observations as for the primary outputs: that the quality varied and that the assumption that smaller scale low capacity community groups were producing outputs of a lower quality than better resourced organisations was not necessarily valid. For example, in *Birmingham Pigeon Archive*, Project Pigeon, a small education and arts charity, produced 70 hours of high quality volunteer managed OH recordings which were used as inspiration for *The Fancy* a three part radio play broadcast on Radio Wolverhampton, a publication and a video of OH clips and pigeon events. The creation of these outputs and the activities which they supported were very successful in delivering the project's main aim to bring people from different backgrounds, cultures and generations together to encourage community cohesion.

The view of HLF development staff interviewed was that, if anything, the secondary outputs could be of a higher quality than the OH recordings themselves:

"There is a mix between projects that achieve both good outputs, like exhibitions, and high quality recordings, and those that just do good outputs with people. Some manage to successfully have a core team doing very professional OH work surrounded by more informal but valuable engagement activities" HLF Development Manager.

Those interviewed were alive to the issues of capabilities of the grantee organisation:

"[The secondary outputs do] vary in terms of depth and academic rigour but the objectives of the organisation in undertaking the OH should be taken into account in making value judgements about quality. We need to be sensitive to what a community can manage and their aims."

Representative from national museums service, oral history specialist, Wales.

There was a particular view, shared by some of our interview group, that arts organisations were especially adept at turning OH recordings into the basis for creative products, like plays, performance, artworks, film and documentaries (e.g. Rowan Arts <http://www.therowanartsproject.com/>). We saw some evidence that the arts based outputs could reach broad audiences of large numbers in a way that more traditional interpretation (such as small temporary exhibitions) may not be able to do. For example, the song recordings from *Songs of Steel*, Rotherham Arts and Local Studies, were broadcast to 60,000 listeners on Rotherham FM.

Others we interviewed wanted to point out that a set of well-produced and sensibly deposited oral history recordings, funded by HLF, could form part of the inspiration and core historical source for the production of other creative outputs after the approved purposes of grant has been completed. For example, some of the oral testimony which the *LGBT Archive Project*, Plymouth Pride Forum collected is being used by a local playwright to inform a theatre play about the life of a local artist.

A number of those we interviewed who are working in museums and/or involved in interpretation cited examples of where new or planned exhibitions and displays had included the repurposing of good quality HLF-supported OH recordings (e.g. Rural Life Museum, Glastonbury; St Fagan's Museum, Wales; Cecil Higgins Art Gallery, Cheltenham; Bridport Museum and; Wardown Park Museum, Luton).

7. Findings: Sustainability of Outcomes

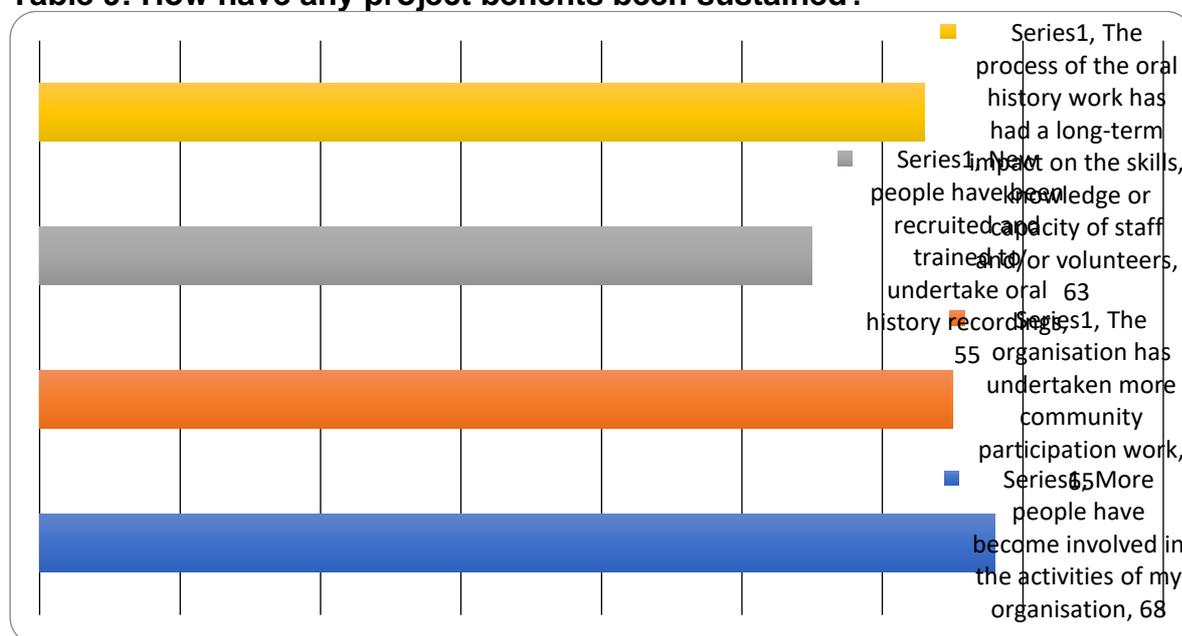
Our research aimed to look at the extent to which HLF’s funding of OH projects has resulted in sustained longer-term benefits for the organisations involved, looking in particular at:

- Whether the OH project has had a long term impact on the skills and knowledge of staff and volunteers within the grantee organisation;
- Whether the project has generated new volunteers to be trained in undertaking OH work;
- Whether the grantee organisation has gone on to carry out more community engagement work;
- Whether the level of involvement of people in the grantee organisation has risen;
- Whether the project had resulted in longer-term partnerships between non-heritage organisations and the heritage sector.

7.1 Sustaining project benefits

The clear evidence from the sample survey was of a positive picture of sustained project benefits, bringing longer-term value to the grantee organisation, its staff and volunteers, as shown in Table 9:

Table 9: How have any project benefits been sustained?



The 82 responses indicate that benefits are being well sustained across the board in terms of more people involved (68), more participation work being undertaken (65) and long-term skills impact on staff and volunteers (63). There was a lesser response to whether more people had been recruited to undertake OH recording (55) but this was still relatively high. The lower response in this area may reflect again the fact that, for the majority of responding organisations, OH collection is not a

main aim, in the way that involvement and participation are, and therefore it is entirely appropriate for that organisation not to seek new recruits for that purpose.

Under the “other” comments section offered, respondents cited the importance of establishing partnerships; being used as a source of advice by other organisations wishing to embark on OH work; a particular community feeling valued; learning lessons to influence future planning and projects and training new volunteers.

Respondents were asked to grade the extent to which the OH recordings had contributed significantly to the delivery of these benefits. The average score for was 4 out of a maximum of 5 where 1 constituted not at all and 5 very much. Given that the recordings often made up only one element of the project outputs rather than being the focus of all activity, this is a strong validation of the value of OH work.

7.2 Partnerships

The development of longer-term partnerships was a key strength of projects with a 77 of 85 positive responses. Given that the majority of respondents were non-heritage organisations (59), the implication here is that a number of established heritage organisation applicants also developed and sustained important partnerships with other bodies.

Non-heritage organisations whose project had involved a partnership with a heritage organisation were asked if they were still working with them. Over two thirds (41 out of 59) responded that they were, but this still leaves some questions open about the reasons why some partnerships came to a finite end and whether underlying this are expectations on the part of community groups that certain heritage organisations are unable to meet. Where partnerships are maintained over the longer term, heritage organisations are seen as an important source of support in maintaining the impact of work (average score of 3.5 out of a maximum of 5 where 5 is very much so). This however masks the fact that the range is quite broad: some heritage organisations are seen as being not at all important and others very much so.

Of the interviewees, 13 had been involved in partnerships at different levels. A record office for example, was described as sometimes being a “junior” partner, i.e. “*not essential for project completion*”. Requests for partnership working might be assessed by a heritage organisation against different criteria, for example:

“The project would need to fit within our collecting policy... There are also practical considerations on partnership working and how likely this is to be successful. There can be capacity and skills issues, for example, with a small charitable organisation. There may be a need for extra staff time to build up their confidence.” National library representative

Successful partnerships tended to be those that had a skilled project manager, supportive structure (such as a steering group with appropriate expertise) and clarity about roles and outputs. The best projects produced good quality results that can be and are being used by historians and community workers. An example is The Museum of London's (MOL) partnership with Evelyn Oldfield Unit (EOU) and London Metropolitan University (LMU). The three partners worked with 15 community based groups using the structure of a steering group and paid field workers. Coordinated by EOU, LMU provided the field workers with a year's training, accredited with a master's qualification in OH and MOL offered guidance and deposit. The project achieved good quality outputs, including a range of local community exhibitions and major exhibition at MOL, and the material is well used by researchers.

Where there was a relationship between a community group and a heritage organisation, the ability to offer continuity of support and professional expertise was seen as key to achieving the best outcomes and outputs.

"The Record Office provided just the right sort of support and especially in terms of depositing, indexing and transcribing so the recordings are accessible long term. Plus help with the community archive website. Their support is long term." Representative from HLF funded community organisation, South West

A sustained relationship is not always possible or wanted by the groups. All the interviewees said that contact between expert advisers and grantees that extends beyond the project does sometimes happen, but only three professionals said that they are able to do this as a matter of routine due to capacity issues. Some groups only exist for the lifetime of the project. Most heritage organisations seem to have to be reactive to approaches from community groups rather than seeking long term relationships with them. A few plan to remain in touch even if it is with a much reduced level of contact:

"Many groups undertake a series of projects and as their capacity and skills take off so support lessens. Some enjoy the process so much that they like to keep in touch. We always aim to retain an interest and presence." Education and outreach officer from large heritage service working with community groups, West Midlands

Partnership projects, though fewer, allow and develop a more in depth relationship; this is more often sustained following the project and leads to other projects.

"One group has been sustained over several projects, with a rolling membership of about 12. They work with us on topic-based exhibitions, usually a subject that is not covered in such depth in existing museum displays. The recordings can then be used for future research." Representative from city museum service, South East

Partnership working on OH projects can also lead to better relationships between community groups and the wider authority within which a heritage organisation sits:

“Young people have been involved who would not otherwise come into the Record Office. It breaks down barriers. It has made the young people more confident in using archival resources, but also, in working with the County Council, they have experienced working with an authority, which may have been difficult for them previously.” Representative from regional sound archive, East of England.

There are some examples of partnerships between heritage organisations and BAME-led organisations that demonstrate that the latter has gained some influence over the future programming and processes of the heritage organisation. Sometimes, this is a planned intention from the outset of the HLF project, at other times something that occurs organically as relationships cement. A good example of this was *Our Stories*, West Yorkshire Archive Service which, amongst other activities, worked with a number of BAME-led groups in Bradford and Keighley to create and sustain community archives online (including OH recordings). There then followed the involvement of some of these groups in determining the themes and content of a number of topic guides to the collections of the archive service. The interests of the groups in core collections, in turn, influenced the choices made by the service in its catalogue work.

8. Findings: Experiences of HLF

We aimed to gain a basic overview of experiences of HLF from the grantee survey sample and the interview group of OHS committee members, networkers, sound archives and museums, libraries and archives.

8.1 Experiences of grantees

The views stated by the survey sample of grantees were overwhelmingly positive. When asked if their organisations would recommend HLF as a funding source to another peer organisation undertaking OH work, 81 of 85 respondents stated that they would. Given the opportunity to provide qualitative commentary on the reasons for recommending HLF, the sample reported that:

- HLF is a unique source of funding for OH;
- It offers a friendly, helpful, accessible, creative and flexible service and skill in helping to shape projects to meet HLF priorities without compromising project aims;
- HLF staff actively encourage OH elements in applications and are genuinely interested in what a project is about;
- HLF understands OH is about community engagement and participation as well as the importance of representation in the record of those not previously included;
- HLF has excellent organisational values;
- HLF offers opportunities for skills development to non-heritage organisations through the application process and project delivery resulting in longer term organisational development; and
- HLF is a gateway to other networks.

There were only three less complimentary comments that were restricted to frustrations with financial grant management and reporting.

8.2 Experience of interview group

The interview group and round table members were extremely supportive of HLF's funding of OH projects and generally positive about HLF as an organisation, its staff and philosophy.

"There have been examples of case officers showing admirable flexibility, championing what could be difficult projects, being prepared to take risks with these and helping projects through." OHS Committee member

Many felt that HLF's approach to funding OH was broadly right and that, in particular, its encouragement of community groups to *"do it for themselves"* was a value which they shared as professionals, along with the organisations they represented.

Many of those we interviewed who worked within heritage organisations were acutely aware that HLF was essentially providing the lifeblood of their OH collections.

“[the relationship with HLF offers us] further collections development!” Representative of regional sound archive, North West

They therefore remained keen to be an organisation to which HLF signposts grantees, even if this created some capacity issues internally, in terms of managing requests for development support. Undertaking a development role on behalf of HLF for potential applicants, was usually seen as a healthy *quid pro quo* for the capture of the collections as legacy deposits. This was happening less systematically prior to the existence of HLF.

There was inevitably some concern that HLF has funded a minority of organisations under the Your Heritage programme that were not likely, even with high levels of support from an experienced partner collecting body, to deliver completely on the approved purposes of grant or to add significantly to the historical record. Where these comments were made they were usually related to the general skills and competencies of the key members of the project team and their ability to plan and execute a robust project plan process:

“The project officer often makes the difference, for better or worse, and whether they are able to plan properly, marshal resources, think through what needs to be done and act on advice, understand where help is needed and build in it.” Representative from national museums service, Northern Ireland.

However, it was well understood that failure to meet all of the approved purposes in a small number of cases would be the same across all HLF areas and partly a reflection of the “light touch” approach to lower levels of awards under the former Your Heritage programme.

Some OHS-accredited trainers also expressed concerns that at times, they were in effect providing free advice and support to HLF applicants and grantees. This did not fit alongside the role of a paid HLF mentor on the Register of Support Services (ROSS) that some had performed in the past or might prefer to perform. As already noted, the kind of training needed by grantees to develop a set of rounded skills is likely to require longer-term input of professional expertise than one day’s workshop at the beginning of a project. This means that where project teams have few or none of these skills prior to planning and delivery, the trainers will be under pressure to continue to provide support in an informal mentoring role, once they have been accepted by the group as a skilled and helpful professional.

One interviewee pointed out that:

“It is hard to estimate how much support a project will need prior to engaging with it.” OHS Committee member

Once engaged, a group also may discover that it needs more help than it had expected prior to training. This is a common reaction when learning new skills from a low base, i.e. at first people do not know what it is they need to learn and underestimate the complexity and effort involved in raising their work to a more professional level. Of course, the point at which this may occur for HLF funded projects is important. If prior to application, the development process will allow for the building in of adjustments to timetables, levels and amounts of involvement, increased training etc. However, should this occur once a grant has been approved, there is inevitably less room for manoeuvre on the part of the applicant to adjust plans to improve the project's quality.

9. Recommendations

This section of the report aims to pick up on the operating context (both external and internal) described in section 3, that our research evidence shows is affecting HLF's investment in OH. We then suggest ways in which that context can be improved.

HLF is not in a position to resolve some of the challenges of the external environment. Some of the most significant challenges lie with the network of national, regional and local bodies with an interest in, and collecting remit for OH. It is clear that a collective effort will be required by all those with stake in the health of OH activity in the UK, to enable HLF funding to have maximum effect. HLF cannot effect this change on its own; it is not within its remit.

Nevertheless, this report was commissioned for internal HLF purposes and the following recommendations are primarily aimed at influencing the actions of HLF:

- 9.1.1 In the absence of a national body with responsibility for the development of OH in the UK, HLF could undertake a formal targeted consultation process with the main players, e.g. OHS, BL, the regional film and sound archives, major museums, libraries and archives, with a focus on the priorities for OH strategic development in the current strategic framework. This forum could also help HLF to address live issues, such as whether the requirement to make HLF funded digital products available through the Creative Commons License (*HLF Guidance on Digital Projects*) is consistent with current professional OH advice concerning the ethics of using personal oral testimony.
- 9.1.2 HLF should encourage these main players to assist in the development of a project to identify existing OH collections in the UK. This would enable the prioritisation of future resources; it might also encourage improved maintenance and increase re-purposing and re-use of some collections. This national register of OH collections would not be restricted to HLF funded projects. It should cover extant collections prior to the existence of HLF and collections developed with other sources of funding. It should be publicly available and be updated regularly. It would then become a key source of information for potential applicants, enabling them to research themes, audiences, and geography as well as enabling greater access to this heritage resource.
- 9.1.3 The strategy team at HLF should consider how HLF's new outcomes-based approach might affect the planning of OH projects. For example, when applicants consider the weighting of the heritage outcomes (for projects over £100k) of "better managed" and "in better condition" over those of "better interpreted and explained" and "identified/recorded", they may alter the balance of their work away from new OH recordings towards deposit, documentation and long term access of existing material.

- 9.1.4 Similarly, the strategy team at HLF may wish to consider the potential effects on OH of *Our Heritage* offering grants of up to £100k, as this is the programme through which the majority of OH projects have previously been funded. The increased level of funding may lead to a magnification of project quality issues, if it is not matched by an increased level of skill and awareness of OH good practice within the applicants' project team.
- 9.1.5 HLF should seek to support the external structures that provide development support for OH projects. This could be done by encouraging applications that would address some of the existing weaknesses, for example, staff in heritage organisations likely to receive deposits (museums and archives) could benefit from training to enable them to support and work in partnership with high-quality community-owned OH projects.
- 9.1.6 HLF should seek to identify more closely and disseminate internally the characteristics of the most productive relationships between HLF development teams and the professional heritage bodies that support community groups, e.g. West Midlands Team and Birmingham Heritage and Archives; North West Team and North West Sound Archive. This is likely to include communication, understanding of mutual priorities, face-to-face meetings and training of HLF staff.
- 9.1.7 Under the new strategic framework it remains the case that Our Heritage applicants can build mentor costs into their applications to provide capacity and reassurance to assessment staff. HLF should encourage applicants without OH skills on the project team to apply for a mentor and consider how OHS accredited trainers who are also on the ROSS register could best combine the formal training and mentoring roles.
- 9.1.8 HLF could consider supporting and/or partnering the establishment and maintenance of an online community for OH applicants and grantees to share experiences and learn lessons.
- 9.1.9 HLF should continue training for HLF assessment and development teams in OH best practice, including the importance of deposit, documentation and evaluation. This could be done nationally or regionally, with partners such as OHS and leading heritage organisations, prior to the reissue of the OH guidance. HLF may also want to consider producing a short OH Checklist for use by Case Officers when assessing applications to ensure they look at the key areas which affect the quality and success of an OH project.
- 9.1.10 HLF staff identified the issue of poor corporate memory. HLF development and operations teams need ready access to information about previously funded OH projects (place, theme, audience, size of grant) from which to advise potential applicants and grantees and to inform assessment. HLF should consider how its current data management systems can best resource that need.

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