

Activity plan guidance

An activity plan sets out everything you will do as part of your National Lottery-supported project to achieve positive outcomes for the people involved. These might be participants, visitors, volunteers or trainees but might also include new and existing staff and your trustees or steering group.

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If you are applying for a grant over £250,000 you will be expected to develop an activity plan during the development phase, after a first-round award, and submit it as part of your second-round application. It is important to read this guidance at the beginning of your application process. You will need to tell us how you will cost and create the activity plan in your first round application.

We will assess your application against it and, if you are successful, use it to monitor the progress of your project during delivery. We will expect you to collect data on the people you reach and as part of the overall evaluation of your project, evidence your success in delivering the activity plan as your project proceeds.

What does an activity plan include?

Activity planning is a process and your plan should clearly set out your thinking. In your first-round application you will have set out in outline what you want to achieve and for whom. During the development phase you have the opportunity to firm up your plans. You will need to decide which specific groups of people you want to reach with your funding. Then set out all of the activity - in detail and properly costed - you will do to meet their needs and achieve against our outcomes.

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

An activity plan doesn't include:

- Large-scale interpretation that involves significant capital costs (if your project involves the creation of a new gallery, for example, you may need to have a separate exhibition or interpretation plan. Make sure to cross-reference the relevant information in your activity plan e.g. if you are having a play area or including oral histories collected through the project).
- Other related planning work from your development phase (for example, an access audit, which is an essential part of planning capital works to a building or site. The information from this additional planning may help *inform* your activity plan, of course).

In this guidance, we do not tell you what activities you should do in your project; that is for you to decide. For ideas, you can read case studies on our website of projects that have successfully engaged people with heritage. There are also case studies of organisations reflecting on the benefits of activity planning .

You might find our guidance on [inclusion, volunteering, learning and training](#) useful if these areas are new to you or you need help in understanding how you might achieve individual outcomes with your activity plan.

Take time to develop your work. The level of activity, and the time it takes to plan, is related to the size and ambition of your project and the funding you are asking for. **The process usually takes months not weeks.**

Creating your activity plan

There are three steps to help create an activity plan:

Step 1: Where you are now

Step 2: Make strategic decisions about engaging people

Step 3: Action planning

There is no set format for presenting an activity plan, except for Step 3 (the action plan), where we provide a [template](#). There is specific information you must include in your plan, this is set out in Step 2. Most applicants choose to set out how they have approached each step.

Step 1: Where you are now

This step is about looking at your current situation, and will help you think through why you want to engage new people with your heritage.

You will need to consider:

Your organisation : who needs to be involved in planning your activity? Do you need to make organisational changes to make it happen?

Your audiences: identifying the people who currently volunteer, visit or participate and also people who are not currently engaged with your organisation and heritage.

Your activities: how do people interact with your heritage now and how does that compare with other organisations?

Actions to consider during Step 1

Reviewing your policies and practice

- Review strategies and plans , for example, your mission statement, corporate plan

- Review your policies , for example, education, interpretation, volunteering, training, safeguarding
- Develop and agree policies if you don't have them; you will find lots of examples online
- Talk to staff, volunteers and governors and key partners and stakeholders to increase understanding of the issues and ownership of the project
- Review your organisation's capacity and consider where you might need additional support or to make changes to management arrangements
- Review people's skills to do planning work and consider providing specific training and development to increase team skills. Allocate a budget for professional development for staff, volunteers and governors as part of the project. You could deliver some training during your development phase if you cost it.
- Talk with and visit other organisations who have done similar projects
- Try a self-assessment toolkit , for example, [Inspiring Learning for All](#) or learn from previous organisational change projects , for example, [Our Museum](#) (the principles are useful to other types of organisation)
- Find out about and join professional networks, groups and organisations that offer training , for example, GEM (Group for Education in Museums – and other heritage), Engage, Visitor Studies Group, BGEN (Botanic Garden Education Network), Natural England [Outdoors for All](#) Group, Oral History Society, Association of Heritage Interpretation, [Museums and Participation Network](#) , Museums Association etc.

Your existing data

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

Understanding who is missing

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

Success factors for Step 1

Being able to:

- Show that you know what organisational arrangements are needed to deliver your aspirations
- Show what others have done and how you will build on good practice
- List who can help you (partners, volunteers, peer support)
- Describe what you do now and how people are already engaged with your heritage. Detail who is involved – what kinds of groups and their numbers
- Demonstrate how people feel about what you do – how well known it is; how well it is valued; how much engagement do people have with it?
- Set out who could be engaged with your heritage through your project

Beginning to:

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

Drafting the plan: step 1

1. Summarise your organisation's commitment to engaging the public and the relationship between heritage and people (reference relevant key documents)
2. Describe any changes that you have made since your first-round application
3. Describe any further changes that you will make during your project
4. Describe how you created your activity plan, including:
 - who has been involved in its drafting;
 - who has been involved in helping you to develop your ideas about what you can do to engage people; and
 - what you have learnt from others.
5. Summarise what you know about the audiences for your heritage now
6. Describe the potential audiences for your heritage and any barriers your organisation might face in engaging people, for example, access barriers at your site, a lack of child-friendly activities, costs, opening hours, lack of expertise in your organisation
7. Describe what activities you currently offer
8. Describe how your present and potential audiences value the activities you offer
9. Describe what you could be doing based on good practice in other organisations
10. Put a summary and the full findings of each piece of research or consultation created in the development period in an appendix, together with any newly created policies that relate to engaging people.

Step 2: Make strategic decisions about engaging people

This step is about linking together the information you have collected, deciding what it all means for your project and making informed decisions about the activities you will do. This step takes place before you go on to plan the activities in detail and decide on the outcomes you will achieve in step 3.

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

Allow plenty of time for step 2.

You will need to consider:

Your project: what is it seeking to achieve?

Your audiences: who is your project for? Who do you want to target with your activities and why?

Your activities: what activities are realistic and appropriate for the people you want to reach? How will the activities link to the outcomes you want to achieve?

Your staff : who will lead the various activities? Do they have the knowledge and skills required?

Measuring success: how do you measure success for these activities? How will you evaluate your activity plan? What will this cost?

Longer-term benefits : How will you maintain the benefits after the project? How will your organisation change and develop for the future? How will you share lessons with others?

Costs: what is the cost of the activities? Are the total costs in proportion to the cost of the project overall?

Success factor for Step 2

Being able to show:

- Why this project is best for your situation (your organisation, your heritage and the people you have decided to target)
- That your plans meet the needs of the people you intend to reach
- What else you have considered and why they are not such good options for this project.

Beginning to think about:

- objectives; and
- how they fit with HLF outcomes, targets (audience targets and targets for outputs like numbers of leaflets, workshops, oral history recordings etc.), resources, budget, timetable and measures of success.

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

Drafting the plan: step 2

1. Give an overview of the kinds of activities (details come in Step 3) you want to do and which of our outcomes you want to achieve
2. Set out how the project fits with the appropriate policies and your organisation's overall activity. Demonstrate your organisation's commitment to putting the activity plan into action
3. Summarise the choices you have made and tell us why these audiences matter to your organisation
4. Give a concise and realistic description of what your project will do to engage people with the heritage of your project. Make links to any large-scale exhibition or interpretation plans
5. Set out plans for how you will handle any potential difficulties in engaging people
6. Give a structure chart for the management of the activities in your project
7. Create job descriptions (with competitive, industry-standard salaries) for staff or apprentices role descriptions for volunteers, and briefs for any freelance workers or consultants
8. Think about whether your proposed costs are realistic
9. Summarise your overall plans for evaluating your measures of success for engaging people
10. Set out how you will share the lessons of your project
11. Set out what will happen once the project is complete (long-term benefits). Think about how your work with audiences, the interests you generate and the materials you use could help sustain the benefits of your project
12. Set out how your organisation will be different after the project and how you will continue to develop your work with communities to ensure your organisation is sustainable
13. Give a summary of the budget for activities, which should be the same as you give in Section 7 of the second-round application form. (The detailed budget for activities will be in section 3 of the activity plan and your project spreadsheet.)

Step 3: Action planning

This step is about developing a detailed plan of what you are going to do to engage people and communities with heritage in your project.

This is the crucial stage of working out how you will deliver your activities.

Actions to consider during Step 3

Discuss and reflect

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

Think about practicalities in detail

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

Work on the budget

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

Think about evaluation

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

Discuss and reflect again

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

Success factors for Step 3

Being able to show:

- a plan of action which details how people will engage with your heritage;
- that you demonstrate that you will achieve the appropriate number and range of outcomes for the size of grant you are requesting; and
- how you are going to achieve these outcomes through activities.

Having:

- an activity plan ready to attach to your second-round application; and
- the information for Sections 4 and 7 of the second-round application form.

Writing your action plan

As you go through Step 3, you need to transfer the detailed information about the activities you have planned to an action plan. We have a set format for the presentation of the action plan – see Appendix 1 for the template with three examples of activity. Your action plan is likely to be a substantial table stretching over many pages. Present it as clearly as possible – you may want to set the pages to A3 to make it easier to read or create it in a spreadsheet.

To support the aims of your project you should provide detailed information under the following column headings:

- your planned activities – a detailed description of what you will do
- your target audiences – who will benefit
- the specific outcomes of your project – how people will benefit, ensuring they relate directly to HLF outcomes
- the resources you will need – this might include partners' resources and in-kind help to deliver the activity
- the costs you are putting in the project budget
- your timetable – when activities will be developed and when they will be delivered
- your targets and measures of success – quantitative (for example participant or user numbers) and qualitative (for example participant or user satisfaction rating)
- your method of evaluation.

You should revisit step 2 of the process, to check that the strategic decisions you made are still right. If they are, you should now be able to give all the information required in Section 2 of the activity plan (the strategic decisions) and complete the plan.

Do not forget to transfer data from your activity plan to the second-round application form –to sections 1, 6 and 8 of the form, as set out below.

Question 1g of the application form asks: Who will benefit from your project? Summarise the target audiences detailed in your activity plan. If your project is focused on site that attracts visitors, Question 1h asks you for visitor predictions. This answer will be informed by your activity plan research.

Section 6 of the application form asks for your top-level project costs, and we ask you for a separate detailed spreadsheet. In your activity plan, you will have worked out the costs of everything you want to do in your project that is not capital works. Include these costs in summary in the application form and make sure they are consistent with your overall project spreadsheet.

Section 8 of the application form asks you to tell us about the demographics of the people in your organisation. This will form a baseline from which to measure the difference your project has made, for example, in terms of activity such as the recruitment of new staff or volunteers.

Tips for successful planning

Do it for the right reasons

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

Involve people

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

Get specialist help

You and your team may well need a specialist to help you prepare your plan, do audience research and perhaps to make sure you and your team have the skills to implement it, especially if you do not have a history of engaging the public. The right advice can also save you time and money in the long term.

Working with consultants

If you ask consultants to help prepare a plan, make sure you work closely with them; you should dedicate some time to this. Make sure you are happy with their work, that they are using your knowledge and that of your staff, volunteers or partners, and that they produce a document that genuinely helps you.

Manage it

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

Mediate

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

Adopt it and use it

There's little purpose in creating a plan to sit on a shelf.