

# EDI Research Findings and Recommendations

March 2021



# Context

The National Lottery Heritage Fund commissioned independent researchers from The Social Investment Consultancy as part of its Equality, Diversity and Inclusion (EDI) Review.

The research took place between December 2020 and March 2021. During this time, The Social Investment Consultancy conducted 38 interviews and gathered data through an online survey completed by 82 grantees who were identified as organisations working with and/or for under-represented groups. Due to time constraints, we only engaged with grantees based in England. The Social Investment Consultancy also carried out nine interviews with Heritage Fund staff members across five teams.

The recommendations outlined will feed into [The Heritage Fund's EDI Review](#), which covers all areas of the organisation's operation:

- investment
- governance
- culture
- workforce

## The research

The research focused on how The Heritage Fund can be more inclusive of groups working with and/or for under-represented groups (race and ethnicity, disability, sexual orientation, age, class).

This research will primarily focus on:

- how grantees perceive The Heritage Fund and its role
- how grantees perceive heritage, and whether perceived difference with The Heritage Fund is a barrier
- what could The Heritage Fund do to become more inclusive, according to grantees
- a stronger focus therefore on strategy than the process

This research will also speak to:

- what are some of the barriers facing grantees
- what could The Heritage Fund do to increase the social impact of heritage on communities of interest

During inception, we spoke to nine staff members (see Annex 1) to ensure the research would meet expectations of The Heritage Fund, identifying the following objectives:

- meaningful and honest insights
- understanding external perceptions
- actionable insights
- put grantee voices at the centre

## Research parameters

### Timeline

This research was conducted between November 2020 and March 2021. The preparation phase took place between November and December 2020 and the primary data collection (interviews and survey) between January and February 2021.

### Research focus

The research focuses on groups currently and historically under-represented in The Heritage Fund's portfolio: race and ethnicity, disability, sexual orientation, socio-economic background and young people. Those groups were identified by The Heritage Fund prior to the project. The research engaged those organisations and groups that received a maximum of two grants from The Heritage Fund between 2013 and 2019. It only includes grant-holders based England due to time constraints.

### Sampling for interviews

Participants for interviews were selected based on:

- links to under-represented groups (race and ethnicity, disability, sexual orientation, age) in the dataset
- for all programmes but the Culture Recovery Fund (CRF), organisations with the smallest turnover were selected
- for CRF, organisations were selected randomly

To identify organisations working with users from low socio-economic backgrounds, we selected organisations based in the 10 most deprived areas based on [Indices of Multiple Deprivation](#). The list of potential interview participants was reviewed and approved by The Heritage Fund's Investment Managers.

### Sampling for survey

Survey respondents were selected based on the same sampling methodology used for interview participants. We initially excluded interview participants from the list of survey respondents but given challenges in gathering enough responses, the survey was also sent to those organisations. We also identified a list of 50 organisations focusing on disability.

## Research plan

### COVID-19 and lockdown

This research took place between January and February 2021, during the third national lockdown. This meant that it was harder for small organisations - especially for organisations with staff on furlough - to take part in the research.

## **Moving from focus groups to interviews**

Originally, the research design included 10 focus groups. However, to better respond to time constraints in the context of the lockdown, we decided to conduct individual interviews. This option offered participants more flexibility and the uptake for interviews was high.

## **Research focus**

The survey as well as staff and expert interviews were conducted as planned.

## **Developing the findings and recommendations**

The findings and recommendations were developed alongside a range of Heritage Fund staff in three workshops:

- frontline staff (investment and engagement managers and customer service)
- research steering group (see Annex 2)
- EDI Review group (see Annex 3)

## **Research limitations**

### **Selection bias**

We tried to mitigate selection bias by adopting a random sampling approach, but it is likely that grantees that had the most positive experience within this group were the ones who ultimately took the time to answer the survey/interviews.

### **Sampling issues linked to data on grantees**

During interviews, we found out that some organisations included in the sample had indicated a focus on under-represented groups, although they were only working with a limited number of users from those groups. As The Heritage Fund does not differentiate between primary target groups (user groups that are the primary audience for a project) and groups that might be reached (or not) through the projects, there is not granular data around key project audiences. This sampling issue limited our ability to fully explore the perceptions of organisations working closely or led by under-represented groups.

### **Lack of grantees with lived experience**

Only five interviewees had lived experience of under-represented groups. This makes it very difficult to argue that this research outlines what communities want or need, as their voices are being mediated by grantees with limited lived experience and not necessarily given appropriate considerations.

### **Relevance of the sample for the purpose of this research**

Engaging with organisations that have received funding means that, overall, grantees feel that there is an alignment between their objectives and The Heritage Fund, and they are broadly satisfied The Heritage Fund’s work. However, this limitation was known and acknowledged at the outset.

## Interview sample

Total interviewees: 38

### Interviewees by user groups they work for/with:

Group	Number of interviewees	Percentage
Youth	12	33%
Socio-economic background	10	26%
LGBT+	5	13%
Black, Asian and Minority Ethnic	4	10% (but 14% of the general population)
Disability	4	10% (but 19% of the general population)
LGBT+ / Socio-economic background	1	2%
LGBT+ / Disability	1	3%
LGBT+ / Youth	1	3%

### Interviewees by grant type:

Grant	Number of interviewees
Culture Recovery Fund (CRF) - 2019	26
All other programmes - 2013-2019	12

## Lived experience

Five interviewees with lived experience in the sample.

## Survey sample

Total survey respondents: 82

<b>Survey respondents by user groups they work for/with</b>	<b>Number of respondents</b>	<b>Percentage of respondents</b>
Other (women, elderly, all groups)	22	27%
Low socio-economic background	21	26%
Disabled people	18	22%
Young people	12	15%
Black, Asian and Minority Ethnic groups	7	8%
LGBT+ groups	2	2%

Completion rate: 73.1%

Response rate: 10.9%

### **Other characteristics**

- 51% of organisations do not have heritage as a primary focus. Fields of activity include activism, arts, community development, food bank and sport
- 80% work with multiple groups
- more than 50% had an annual turnover lower than £100,000 and 26% lower than £500,000
- community heritage is the most common heritage type (64%), followed by cultures and memories (42%), museums (32%), areas and buildings (28%)
- 50% applied in 2019, 20% before 2016, 15% in 2018

# Findings

## Summary of findings

- **The role of heritage:** the most common themes that define the role of heritage for respondents were wellbeing, social equity, community cohesion and developing skills.
- **Perception gap around the definition of heritage:** there is a perception gap between The Heritage Fund's policies, practices and what The Heritage Fund thinks it communicates, and what respondents perceive.
- **Value and perception of the mandatory inclusion outcome:** the [mandatory inclusion outcome](#) is valued but is perceived as difficult to comply with for projects that aim to engage primarily with under-represented groups around the heritage that is relevant to them.
- **Support for small organisations:** respondents identified a need to support capacity building of smaller organisations in different ways to larger organisations. Organisations led by under-represented groups are more likely to be smaller.
- **Expectations and perception of The Heritage Fund:** there were four main expectations of The Heritage Fund:
  1. supporting small organisations
  2. become a champion for marginalised communities in the heritage sector
  3. for a definition of heritage that includes wellbeing and social equity considerations
  4. advocacy and action to prove the importance of heritage
- **Identifying organisations led by under-represented groups:** The Heritage Fund's grants data quality is not of sufficient quality to enable the identification of organisations led by or with lived experience within the portfolio.

## The role of heritage

Interview and survey respondents were asked: Why do you think your heritage work is important for the communities you work with, especially under-represented groups?

Findings are reported for survey and interview answers combined.

**Wellbeing** (mentioned by 57% of participants), associated with:

- wellbeing through sense of community
- special wellbeing approaches (eg: for people with memory loss)
- opportunities for engagement in deprived areas, access to outdoors

**Community cohesion** (mentioned by 32% of participants), associated with:

- sense of belonging
- pride in local heritage
- bringing people together and learning about other social groups

**Social equity** (mentioned by 29% of participants), associated with:

- empowerment through heritage and using the past to imagine the future
- offer a platform to discuss social issues
- being inspired by role model
- help with processing discrimination traumas

**Skills, inspiration for creativity** (mentioned by 16% of participants), associated with:

- discovery
- research of local heritage
- confidence building

**Preserve** (mentioned by 13% of participants), associated with the preservation of buildings, culture, etc.

**Educate** (mentioned by 10% of participants)

In the survey, about 54% of respondent strongly agreed or agreed to the statement: “The Heritage Fund truly understands the value of heritage for marginalised groups”. 33% were neutral and 12% disagreed.

## Expert interviews

Experts interviewed in the context of this research also highlighted the role of heritage in driving social equity and wellbeing outcomes:

- There is a growing body of evidence showing that heritage plays a role in changing perceptions and narratives.
- Heritage is power (critical heritage studies), it is never neutral, and can be used to act upon the condition of people who suffer from discrimination. Co-production should be at the centre of this work (eg: Wellcome Collection).
- Research shows that heritage can enhance individuals and community’s wellbeing in many ways.
- [Wellbeing and the Historic Environment](#) outlines seven ways heritage contributes to wellbeing:
  - heritage as process (volunteering)
  - participation (visiting)
  - mechanism (bringing people together for therapy/social groups)
  - healing
  - place (place shaping)
  - environment
- Planning for wellbeing outcomes can be a mechanism for diversity and inclusion by breaking down barriers of access.

## Perception gap

**Most respondents link The Heritage Fund's definition of heritage to the eight heritage types (see Annex 4) and not to an open definition of heritage.**

We found:

- Most grantees we interviewed thought that The Heritage Fund definition includes a wide range of heritage types (eg: social history).
- For 80% of survey respondents, heritage as defined by The Heritage Fund was: "Something that falls under the eight types of heritage".
- Only 16% of survey respondents replied: "The Heritage Fund has no set definition of heritage and accepts any project that is defined by the community as 'heritage'".

**Certain types of projects are not perceived as being interesting to The Heritage Fund, even though The Heritage Fund does support such projects.**

This included projects:

- that are about or touch on 'sensitive' topics such as sexuality (eg: dimension of LGBT+ heritage) – staff noted that The Heritage Fund did support that kind of projects
- that are designed for one specific group or when it is too hard to engage other groups (inclusion outcome)
- that are for or led by under-represented groups but not about under-represented groups' heritage
- centred around wellbeing and with limited engagement with heritage artefacts (but some engagement with intangible heritage)

**Findings from both the survey and interviews show that there is a need for more information and better communication about The Heritage Fund's funding strategy (eg: what The Heritage Fund will fund)**

From the survey results:

- having case studies provided to better understand what The Heritage Fund means by heritage (54%)
- having a list of very concrete questions to answer about the heritage project, instead of having to explain what we mean by heritage (46%)
- having a clear definition of heritage provided by The Heritage Fund, so we don't have to explain what we mean by heritage and we know which project we can put forward (45%)
- nothing – I think what The Heritage Fund does now is sufficient (14.6%)

From the interview feedback:

- providing examples of projects accepted (the surprising ones) and definition of what heritage is
- including less abstract questions in the application
- being able to provide case studies instead of writing about the project in the application

**Quote from a survey respondent:** “I think you (The Heritage Fund) have a terrible problem with language and (buzz)words get used with different meanings in different contexts. This makes it hard for any organisation of any size to understand what the fund is actually asking.”

**The word ‘heritage’ has a wide range of connotations and more “conservative” definitions of heritage are still present, which makes it difficult for some groups to feel that The Heritage Fund is relevant to them.**

We learned:

- Many respondents noticed that many community organisations tend to have a conservative definition of heritage (eg: old buildings for the enjoyment of the middle-class) and believe it is not relevant to them. Respondents tended to have a relatively open definition of heritage, but it is interesting to note that some of them discovered heritage work recently (and what heritage means) recently or through their work with The Heritage Fund.
- At least six respondents noted that they would like The Heritage Fund to distance itself from a definition of heritage understood as “English Heritage”.
- Four interview respondents perceived The Heritage Fund contact’s understanding of heritage as more open than the one of The Heritage Fund itself.

**Heritage Fund staff might also adopt different definitions of heritage, since respondents shared that certain projects were rejected for not meeting the definition of heritage (before the inclusion outcome was introduced).**

We found:

- 10% of survey respondents reported that they had been unsuccessful because of their “lack of alignment with The Heritage Fund’s objectives” in the past, and 6% because their project was not considered as heritage.

**Quotes from respondents:**

- “I think with the heritage fund they are very academic and very passionate but not necessarily understanding how it is for the average person. You need a level of understanding of heritage that is not average to work with them. When I read the information that is how it comes across. But it got better.”
- “Before project I thought it was about old buildings - but now I realise it’s anything that informs the future of how we move forward whilst recognising history on whatever form it is.”
- “There is a lot of organisations who have a worthwhile project but that are neither art or community project that might not understand why what they do is valuable from a heritage point of view.”
- “We’re dealing with identities and self-expression: people’s understanding of themselves, why they’re marginalised, and why they should be included. I would want heritage funders to see that when we talk about heritage, we’re talking about identity, somebody’s legacy, who makes them who they are (or

what gives them an understanding who they are) - immediately it broadens and it becomes inclusive.”

## **Value and perception of the mandatory inclusion outcome**

**Most respondents found the mandatory outcome useful and valuable.**

We discovered:

- All the respondents interviewed recognised the value of the mandatory inclusion outcome, whether it is to keep them accountable to being inclusive or ensuring that they think about this constantly in project design and delivery.
- Most survey respondents (65%) want to keep it.

**Survey question:** Would you rather keep or remove the inclusion outcome as a mandatory requirement for your project(s)?:

- Keep it: 65%
- Depends on the project: 31%
- Remove it: 4%

**Respondents share their perception of the mandatory inclusion outcome:**

- 31% of survey respondents think that keeping the inclusion outcome should depend on the project.
- Some respondents noted that the mandatory inclusion outcome is not well-suited for projects that aim to engage primarily with one under-represented group (an audience that is not used to being engaged with heritage). Their perception is that the mandatory outcome requires them to engage with more than one group.
- However, staff noted that the projects engaging people from even only one under-represented group would meet the requirement for the inclusion outcome.

## **Support for small organisations**

**Respondents expressed a wide range of wishes, but the most common was around recognition of the needs of small organisations.**

Respondents want The Heritage Fund to:

- Provide core and long-term funding instead of project-based to enable small organisations to develop and become sustainable.
- Provide support at application stage and over the lifetime of the grant. Staff members highlighted that they could observe the difference in time dedicated to high value projects (often big organisations) and small value projects, even though they knew small organisations needed more support. They found it to be a very important point to reflect on.
- Foster collaborations between organisations to enable smaller organisations to deliver long-term projects, develop long-term and meaningful partnerships.
- Provide support to recruit volunteers - it is difficult to recruit volunteers, especially for organisations working with/for under-represented groups, as

they are less likely to volunteer than other groups ([NCVO, Time well spent: Diversity and volunteering](#). 2020).

According to existing research in the sector, organisations led by under-represented groups are more likely to be smaller and face challenges in finding funding ([Voice for Change, Funding for BAME communities](#), 2015).

**Quote from a respondent:** “I would also love to see more openness to funding core costs for small and especially diverse-led groups, which would support long-term positive changemaking through heritage, rather than 'stuttering' from project to project.”

## **Expectations and perception of The Heritage Fund**

**Respondents had four key expectations for The Heritage Fund.** Respondents expressed a wide range of wishes or concrete actions they would like The Heritage Fund to take. Their ideas reflected their main expectations for The Heritage Fund (some are cross-cutting):

- 1. Recognise and respond to the needs of small organisations:**
  - Provide core or long-term funding to small organisations
  - Provide support with volunteer recruitment
  - Foster collaboration between organisations to enable smaller organisations to deliver long-term projects, develop long-term and meaningful partnerships
- 2. Be a champion for marginalised communities in the heritage sector and elevates diverse voices:**
  - Funding stream for under-represented groups with specific outcomes, because projects focused on under-represented groups (wellbeing and social equity) are likely to require different outcomes and sources of support.
  - Involve people from under-represented groups in decision-making (through co-production, co-design, panels)
- 3. Advocate for a definition of heritage that includes wellbeing and social equity considerations:**
  - Better understand under-represented groups. This was also mentioned as a gap by staff.
- 4. Advocacy and action to prove the importance of heritage:**
  - Use impact evaluation and data to prove the importance of heritage for wellbeing and social equity
  - Make sure that funded organisations can compensate staff fairly, so that organisations can attract more diverse staff

**Quotes from respondents:**

- “it would be good to see a fund specifically for YP. Because the outcomes would be different. Or also for minority groups like LGBT to have their own access to funding.”
- “I would reach out to those communities and do the market research behind it. To bring them on board, so those voices are here when decisions are being made.”

**Most grantees have a positive opinion of The Heritage Fund** and use terms like:

- supportive, encouraging and enabling (45%)
- lifesaver, vital, valuable (30%)
- open or open-minded (10%)
- grantees were most likely to use positive words

**The most criticised aspect of The Heritage Fund is:**

- its bureaucracy and the complexity of the application process (20%)
- elitist and academic (2%)
- too prescriptive (2%)
- not culturally diverse (1%)
- stuffy (1%)
- small organisations tend to be more likely to criticise the Fund for being bureaucratic.

**Grantees think that the Fund understands the value of heritage for under-represented groups but can do better.**

We found:

- In the survey, about 54% of respondents strongly agreed or agreed to the statement: “The Heritage Fund truly understands the value of heritage for marginalised groups”, but 33% were neutral and 12% disagreed.
- In interviews, most grantees thought that The Heritage Fund understood the value of heritage for under-represented groups, but a lot of them flagged that The Heritage Fund as an organisation needed to make an effort better assess local needs instead of assuming what people needed.
- Heritage Fund staff also highlighted the need for them to spend more time understanding certain communities.

We asked participants if they could tell us about funders that had adopted an inclusive approach. Funders cited as examples were mainly small and community-oriented, such as:

- [Francis C Scott Charitable Trust](#)
- [Garfield Weston Family Foundation](#)
- [Communities First](#)
- [Northern Rock Foundation](#)

Those funders are appreciated for their understanding of local needs, flexibility, the simplicity of the application process (eg: open format to allow applicants to write about stories and impact).

Some bigger funders were also mentioned:

- The National Lottery Community Fund, for its simplified application process and ability to connect organisations with potential partners
- Paul Hamlyn Foundation, for its progressive approach to social equity
- Esmee Fairbairn, for its focus on communities
- Arts Council, for its Organisation Portfolio and provision of core grants

## Identifying organisations led by under-represented groups

We found that it was not possible to identify organisations led by under-represented groups based on existing grants data quality. The table below presents the composition of our interview sample based on type of heritage and leadership:

<b>Types of heritage</b>	<b>Led by</b>	<b>Effort</b>
Not relevant to under-represented groups specifically (eg: Castle Howard, Doddington House)	Not under-represented groups (27)	Outreach to under-represented groups  Effort to make heritage relevant to under-represented groups (eg: reinterpretation, focus on certain elements)
Heritage that is particularly relevant to under-represented groups (eg: Black Cultural Archives)	Not under-represented groups (mostly) (6)  Led by under-represented groups (5)	Focus on engaging with those groups for co-production or activities and eventually with a wider public

Only 5 people with lived experience were interviewed (visibly non-white or who shared their lived experience as LGBT+ or low socio-economic background), which might indicate that only a small number of grantee organisations are led by under-represented groups.

# Recommendations

## Summary of recommendations

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

## Adopt a more nuanced approach to equality, diversity and inclusion

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

1. **Participation** (linked to inclusion outcome): there are different levels of inclusion, from outreach to co-production, the inclusion outcome should capture all of them.

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

#### **The framework will:**

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

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

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

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

The Heritage Fund should:

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

**Timeline:** medium-term (2022)

## **Review The Heritage Fund's communication strategy and approaches**

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

The Heritage Fund should:

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

**Timeline:** short-term (2021)

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

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

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

- developing meaningful and equal partnerships, to enable small organisations to deliver long-term projects
- building capacity for co-production with under-represented groups (so heritage is relevant for them)
- Increasing understanding of decolonisation\* across the sector to make heritage relevant to under-represented groups and explicitly move beyond an understanding of heritage as a "White British" social institution. Respondents indicated that heritage was sometimes not seen as relevant for under-represented groups because it was not "about them".

- Disability issues, to make sure disabled people have access to heritage and participate in projects. The Heritage Fund could build on existing good practices internally (eg: Guidance on Accessibility).

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

**Timeline:** medium-term (2022)

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

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

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

The Heritage Fund should:

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

**Timeline:** long-term (2023 and after)

## **Improve EDI data collection and conduct analysis on existing data sets**

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

The Heritage Fund should:

- Collect more detailed data at application stage and analyse it regularly. This includes making a difference between “led by” and “for” under-represented groups, and between organisations that are trying to diversify their audience (eg: historical buildings) and organisations that have the heritage of under-represented groups at the centre.
- Analyse reasons for rejection given to organisations that were unsuccessful. Look for trends in the type of organisations rejected for certain reasons (eg: lack of alignment with The Heritage Fund’s objectives).
- engage with organisations whose applications were unsuccessful
- ensure that analysis of diversity data is conducted on a regular basis

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

## **Encourage power-sharing within The Heritage Fund**

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

The Heritage Fund should:

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

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

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

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

The Heritage Fund should:

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

We saw that 10% of survey respondents reported that they had been unsuccessful because of their “lack of alignment with The Heritage Fund’s objectives” in the past, and 6.3% because their project was not considered heritage. It is important to ensure that The Heritage Fund’s definition of heritage is implemented when grants are being reviewed.

The Heritage Fund should:

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

**Timeline:** short-term (2021)

# Annexes

## Annex 1: Staff interviewees

- Isabel Hunt: Executive Director, Business Innovation and Insight
- Una Duffy: Director of Investment
- Liz Ellis: Policy Project Manager
- Araba Webber: Head of Strategy
- Kay Watson: Customer Service Manager
- Amy Potter: Business Delivery Assistant
- Jeremy Fenn: Senior Investment Manager
- Ana Osborne: Investment Manager
- Annie Mottisfont: Engagement Manager

## Annex 2: EDI research steering group

- Tom Walters: Head of Research
- Liz Ellis: Policy Project Manager
- Jo Arthur: User Researcher
- Louise Sutherland: Senior Engagement Manager
- Amelia Robinson: Insight Manager
- Faruk Barabhuiya: Insight Manager

## Annex 3: EDI Review group

- Andrew White (Chair): Director, The National Lottery Heritage Fund in Wales
- Richard Wilson: Director of HR
- Araba Webber: Head of Strategy
- Vanessa Harbar: Culture Change Lead
- Louise Sutherland: Senior Engagement Manager
- Liz Ellis: Policy Project Manager
- Belinda Wych: Culture Change Coordinator
- Demmy Adewole: Governance Manager

## Annex 4: heritage types

- community heritage
- industrial, maritime and transport
- landscapes, parks and nature
- museums, libraries and archives
- cultures and memories
- places of worships
- areas, buildings and monuments
- intangible heritage

## Annex 5: Key concepts

This research is underpinned by concepts from research in the field of heritage and builds on existing evidence from the sector.

**Social value of heritage:** this research focuses on the social value of heritage, whereby heritage is defined by its role for a particular community rather than by external (often imposed by white and Western experts) criteria or by its material characteristics. A number of institutions in the heritage sector are now adopting this definition (eg: Council of Europe).

**Social equity and heritage:** research from the critical heritage studies showed that heritage has the potential to create a sense of belonging and identity, but also to exclude minorities groups from mainstream discourse. Definitions of heritage are therefore intrinsically political, and heritage must be recognised as a source of power (Stuart Hall; Waterton and Watson; Graham; Ashworth and Tunbridge).

A significant body of evidence has shown the role of heritage in changing perceptions and narratives (Richard Sandell). In acknowledgment of this fact, there has been a growing number of organisations and academics exploring the potential of heritage to drive social equity outcomes (eg: [Museum Activism](#), [Action Heritage](#)).

**Wellbeing (individual and collective):** the [What Works Centre for Wellbeing](#) defines wellbeing as: “quality of life and prosperity, positive physical and mental health, sustainable thriving communities”.

There is [evidence](#) that heritage is connected to a wide range of beneficial impacts on the mental health and wellbeing of people and communities. It is worth noting that there is still a lack of research on the impact of intangible heritage.