

Inclusion guidance

This guidance will help you address our inclusion priority in your project. It is for everyone applying for a grant, regardless of the size or type of organisation you represent or the amount you are requesting.

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Introduction

We believe:

- everyone in the UK has a stake in heritage
- everyone should have the opportunity to benefit from National Lottery funding, regardless of age, class, disability, ethnicity, faith, gender, income or sexuality
- heritage that is more inclusive will be more sustainable
- as a funder, we should demonstrate leadership to achieve higher levels of inclusion in heritage, which is key to a flourishing, more equitable society

Every project we fund must achieve our outcome **‘a wider range of people will be involved with heritage’**. This is our inclusion outcome. It is mandatory because we want all of our grants to contribute to a society where everyone has the opportunity to take part in and benefit from heritage. What you do to achieve our inclusion outcome will usually depend on the size of the grant you request; this guidance is designed to spark some ideas.

You will achieve most impact if you embed an inclusive approach throughout your project. Taking an inclusive approach might help you think about the way you achieve our other outcomes, too, such as:

- People will have developed skills
- People will have learnt about heritage
- People will have greater wellbeing
- The funded organisation will be more resilient.

What is inclusion?

Inclusion is about taking action to ensure that contemporary society in the UK is better represented in your heritage project. It is also about ensuring that everyone you work with feels a sense of welcome and belonging.

We know that the UK is an unequal society. There is unequal access to heritage too, as evidenced, for example, in the DCMS Taking Part survey and the Monitor of Engagement with the Environment (MENE).

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

People with these characteristics can experience barriers to being involved in heritage and are generally under-represented as visitors, participants, volunteers and in the workforce.

People on low incomes can also face barriers to engaging with heritage. People who are unemployed, for example, are likely to experience poverty, reduced social and community networks, and are more likely to have long-term ill-health or a disability.

With inclusion central to our funding, we want your project to:

- remove or minimise disadvantages suffered by people in their experience of heritage due to their protected characteristics or income
- help meet the needs of people with certain protected characteristics where these are different from the needs of other people
- encourage people with certain protected characteristics and/or on low incomes to participate in heritage, especially where their participation is disproportionately low.

Taking an inclusive approach

Inclusion can and should be a part of everything that you do, whatever the scale of your project.

Your approach to achieving our funding outcome that **'a wider range of people will have engaged with heritage'** will depend on your organisation's particular circumstances, size, location and ambition and there is no 'one size fits all'. Inclusion is a process - and always a work in progress for any organisation.

Start by being reflective: who you are not talking to? Who isn't currently reached by your work? By assessing your organisation or community context, and identifying people and communities who are missing from your audiences, workforce or governance, you will begin the process of active inclusion. If you are applying for a grant of £250k or more we will ask you to do formal audience development work during your development phase and set it out in your delivery phase Activity Plan.

People as an asset

People will always be the major asset within your project. Understanding the demographics of your local or regional area and being aware of the barriers that prevent people accessing heritage equally, will help you plan what difference you could make with your Lottery grant. It is important to recognise that we all have

multiple identities, based on the relationship between, for instance, our gender, age and employment. Having an awareness of the intersections in our identities (for example, disabled child, young person with mental ill-health, older lesbian, unemployed older man) is important in helping you think about who you are already reaching and what you might do next.

Scale of activity

There are many ways in which you can embed inclusion into your project. For example, working at a small scale, you might decide to recruit and retain a more diverse range of volunteers to be representative of your local community, or ensure your website and publicity materials take account of best inclusive design practice. Thinking about intersectionality, your service might already be really popular with children and families but not diverse in terms of class; here you might decide to focus a project on extending your offer to less affluent schools and families.

In a large-scale capital project you could take the opportunity to adapt your site to make it significantly more accessible, and include activities that will encourage new people to come and experience the heritage for the first time.

If a lack of workforce diversity is evidenced in your organisation/sector, you might decide to include a positive action training initiative in your project (helping to achieve our skills outcome). Are there opportunities for more disabled people or ethnic minority community participants to take active roles as leaders in your project? How can your governance more accurately reflect the wider range of people you want to involve as volunteers or staff (so your organisation is more resilient)?

If your current visitors are predominantly from affluent postcode areas or fall into higher socio-economic classifications, you might consider including non-ticket days to attract a wider range of people, or programming informal learning activities (helping to achieve our learning outcome). Could you work in partnership with a local youth group or care home for the first time? Or introduce inter-generational exchange activities to build connections between people?

Planning for inclusion

The information you will need

To apply to us, you will need to understand who is currently engaging with your organisation and what change you want to see as a result of your project. We will ask you about the demographics of your organisation, including staff, volunteers and governance. We will also ask you about your current audiences and the communities you work with (whether local, regional or national). This is your baseline, and will be used to measure changes in the range of people involved. We will ask you to set targets for the difference you want to see as a result of your funded project and we will monitor your project against these targets and ask you to evaluate your work against them.

It is helpful to understand the demographics of the area in which you work. The [Office for National Statistics data](#) provides national and local level information on ethnicity and cultural identity in different parts of the UK. You can then compare your demographics with the wider community, and understand the gaps. There is lots of research available to inform your thinking if you are applying for a grant over £250,000 or want to increase your ambition (see the resources section).

You will also need to understand the barriers people face in getting more involved, and what changes could be made to help people feel welcome. This should be done through **consultation** with under-represented groups, including potential visitors or volunteers for example, and organisations that work with them. This information gathering stage is crucial. It will help you understand what you are doing well and what capacity you will need to be able to do more.

Deciding where to focus

There is probably a lot to do to make your site, service or project really inclusive, and you are likely to have lots of ideas about next steps. It probably won't be possible, however, to achieve everything with a single project and it is important to focus your plans.

Think about what is driving your need to be more inclusive. Begin with your current participants and visitors and your potential new audiences, as well as the opportunities presented by your wider project. Identify your target audiences, and potential actions through consultation. Help identify your focus through discussions and decision-making about basic facilities and services.

Sustaining your impact and outcomes

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

Understanding barriers

Despite legislation, groups with protected characteristics remain under-represented in every aspect of heritage. You can make a difference by understanding the barriers people face and actively plan to challenge them. Talk to the people you want to involve at every stage of your project: what practical, economic or other barriers are currently stopping engagement and could be removed?

When thinking about involving disabled people, you should understand and use the **social model of disability**. This recognises that society places barriers in disabled people's way that can be overturned through societal action and the allocation of

resources. The [model](#), developed by disabled people, highlights that society is unequal and that change is not the responsibility of individual disabled people but of all of us.

There is a wealth of advice available, much of it led by disabled people. For example, see the work of [Scope](#), [Mencap](#) and [Mind](#) to gain more knowledge of barriers experienced by physically and learning disabled people and the role of mental health in all our lives. Consult with local groups (e.g. Autism organisations or mental health groups) to get ‘expert by experience’ input into your project. Think about how the skills and expertise of disabled people could inform your organisation, for example, through paid roles or involvement in governance.

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

If a barrier can’t be removed completely, you should make a ‘[reasonable adjustment](#)’. For example, install a lift or ramped access where stairs currently stop wheelchair users or people with other mobility aids from accessing your site. Talk to people about the range and type of seating you provide, both outdoors and inside, so families or friends, including an older member needing arm or back support, can sit together to enjoy their visit.

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

Sensory barriers can be addressed by using different communication methods. For example, you could commission tactile interpretation panels or displays for indoor and outdoor use, provide British Signed Language talks or events in collaboration with a local Deaf organisation (making sure you advertise these widely will help ensure greater participation) or provide large print or audio guides for exhibitions or trails.

Where there is a **lack of intellectual access**, participants can benefit from a different approach to interpretation, signage or learning resources. For example, multi-sensory learning resources co-produced with an English for Speakers of Other Languages (ESOL) course tutor and students could improve learning opportunities for a wider range of people.

Economic barriers can affect working people on low wages, unemployed people and some retirees. Entry charges can be prohibitive, but you could for example provide discounts for local people on certain times/days. Consider other costs too, such as interpretive tours or refreshments, and whether you could provide, for example, a free download for self-guided tours or a picnic area. A lack of affordable and regular public transport in rural areas can also be a barrier to a wider range of people taking part.

Welcoming people

Inclusion is not just about removing barriers so that people can participate. It is also about creating a welcoming environment, where people feel that they belong. This should begin before visitors arrive at your site or take part in an activity.

Your **publicity** must appeal to the communities you want to attract. It needs to inspire and reassure people. Show how your offer might be relevant, and where you have taken steps to reduce barriers, so potential visitors are aware. Make sure your website conveys a friendly image of your organisation. Include information about disability access and any other adaptations. For example, tell people you have a picnic area. Advertising specific tours or events will also help to increase attendance. Ensure that publicity is in places or media used by the people you are trying to reach.

Think about how you can make people feel **welcome at your events or site**. Ensure that staff or volunteers that have contact with the public are trained, and that concerns by anyone (for example unusual behaviour demonstrated by a visitor which may be a result of autism, profound disability or dementia) can be discussed with appropriate staff. Your project is a great opportunity to find solutions to make everyone feel valued. [Rethinking Heritage, a guide to making your site more dementia friendly](#) shows how heritage organisations are welcoming people living with dementia.

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

Consider your basic provision, which might include induction loops, interpretation sessions using audio description or object handling to involve blind or partially sighted visitors. Information in community languages, or in-house speakers, can also involve a wider range of people in heritage. Improving toilet facilities can contribute to inclusion too. Providing [Changing Places](#) and gender neutral toilets can make a difference to who visits and how they feel. Promoting such facilities can attract a wider range of visitors, often who bring friends and family, in turn increasing ticket, refreshment and gift shop sales.

Do you **reflect the people you're trying to reach**? Representation is important. Seeing a range of people represented in staff and volunteers can help a wider range of visitors feel welcomed and a sense of belonging to your organisation or site. For example, young explainers can create a less traditional environment, and show that heritage is relevant to young people. Having diverse staff, volunteers and governance can bring new ideas and experience, making organisations more open to change and, often, more relevant to their communities.

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

Identifying potential partners

Having identified your target audiences and what they might need to take part, consider potential partners to help you plan (and possibly deliver) the activities or changes you might include in your project. This is a great opportunity to build your knowledge about the wealth of organisations with inclusive engagement, participation and partnership expertise. See the resources section for further information and ideas.

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

For example, if you want to reach people who are currently unemployed, are you in touch with your local Job Centre Plus or organisations providing services for unemployed people including, for example, local housing, health or disability-led groups?

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

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

Safeguarding and wider safety

Safeguarding

As a grantee, you will be expected to meet your legal obligations. If you are working with children, young people or vulnerable people, including older people using care services, people with learning disabilities, people using mental health or supported housing services, or people living with dementia, you will need to have safe-guarding policies and practices in place. More information can be found in the resources section.

Remember that many sectors and organisations outside heritage, including youth, education and health sectors currently use safeguarding procedures as standard practice. Start conversations with experienced people about safeguarding as part of

building your knowledge about inclusion and widening access to heritage. Do not ask or expect volunteers on your project to be responsible for supporting vulnerable participants without providing training, supervision and support. Make it clear to volunteers who in the organisation holds responsibility for safeguarding. If you cannot do this, do not include these groups as part of your project.

Feeling safe

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

Budgeting for inclusion

You will need to budget appropriately to ensure your inclusive work is realistic and deliverable. There are three simple principles to follow and a check list of possible costs to consider.

We expect you to consider and adhere to basic principles of minimum pay and fair treatment for all. Ensure you are paying the National Living Wage as a minimum for all staff involved in your project. Do not expect that disabled people, younger people, community representatives or other people whose expertise you value and draw on, will want to donate their time. Are there ways you can pay or provide appreciation (e.g. vouchers, family entrance tickets) for time and expertise shared?

In widening the range of people you involve, ensure you consider ‘hidden costs’. For example, including learning disabled people as full participants and contributors to your project may involve covering the costs of a support worker, extra learning resources or significantly more time. Discuss these costs early on with partners and budget accordingly.

Consider other supporting costs too. Find out whether adequate public transport exists or whether you need to provide a mini bus or shared transport?

Plan to provide high quality refreshments at any events you organise. People will feel more valued when you provide good and appropriate refreshments. Think about cultural and dietary preferences. Check what people eat and drink in advance and try not to make assumptions.

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

- Audience research and monitoring – baseline setting and collection and analysis of data
- Consultation with community groups you want to reach and/or access audits

- Community engagement or learning events
- Digital outputs such as apps, online trails or games
- Research for new content/stories or budgets for new kinds of collecting/ oral history work etc
- Recruitment costs for trustees, staff, volunteers
- Reasonable adjustments for sites – physical access, interpretation or sensory adaptations, such as the use of Sign Language or tactile interpretation for [hearing impaired](#) or [sight impaired](#) people.
- Other costs of involving people e.g. volunteer expenses, transport costs, childcare costs, protective clothing or health and safety equipment for trainees, appropriate resources and support (e.g. [Makaton signing](#), personal care) to ensure the active and regular involvement of learning disabled people
- Translation costs. In Wales you will need to meet the requirements of the Welsh Language Act. It might be appropriate for you use Gaelic, Cornish or another community language alongside English in your project depending on the context for your work.
- Publicity, website
- Staff training.

Through consulting, anticipating and planning for costs, you will be able to make your project more inclusive.

Resources and evidence

[Equality Act](#) (England, Scotland, Wales) and protected characteristics.

In Northern Ireland, [Section 75](#) of the Northern Ireland Act and the Disability Discrimination Act apply.

The [Taking Part](#) survey in England provides information on a range of participation and engagement, including [heritage](#).

The [Monitor of Engagement with the Natural Environment](#) (MENE) survey provides trend data for how people use the natural environment in England.

The Equality Trust document the [effects of inequality](#) on our society.

The UK Government has created a website to support its Race Disparity Audit giving [facts and figures relating to ethnicity](#).

The [Runnymede Trust](#) publishes research on race, ethnicity and equality, including the inter-connections between [gender, ethnicity and poverty](#).

The Fawcett Society, the leading women's equality organisation, has a number of local [groups across the UK](#).

Glasgow Women's Library research, has produced a [report on inequality](#) to inform the work of the museum sector; it explains intersectionality and has wider relevance.

The Shaw Trust, is one of many charities in the UK working on behalf of disabled people. They often work in [partnership](#) and offer [accessibility advice services](#)

Stonewall, the UK equality organisation for LGBT+ people, leads research on the implications of discrimination towards LGBT+, for example, for [people at work](#).

The Sutton Trust works on UK social mobility. They have researched the role of [unpaid internships as a barrier](#) to career progression.

The Government has published advice on [accessible communication](#) and a range of charities provide resources too, for example, [VocalEyes](#), [RNIB](#), [Action on hearing Loss](#).

Historic England produces guidance on easy access to [historic buildings](#) and [landscapes](#).

The [NHS](#) publish advice on safeguarding for vulnerable people. The NSPCC provides [signposting](#) to child protection policy in all four nations of the UK.