

COMMUNITY WITHIN  
COMMUNITIES



Made possible with

Heritage  
Fund

Based on the Community within Communities Project 2021-2023



# Heritage Toolkit

Designed for Voluntary, Community  
and Faith Groups in Sefton.



**Sefton CVS**  
Supporting Local Communities

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# Why Heritage?

**By engaging with heritage, we can help people to connect based on their shared experiences or by learning from their differences.** From historic buildings and the natural environment to traditions and stories, heritage can be anything from the past that you value and want to pass on to future generations. Sefton's heritage is unique and diverse and we are all a part of it.

From October 2021 to January 2023, Sefton CVS ran the Community within Communities project which was funded by the National Lottery Heritage Fund. Throughout this project, we were able to fund and support 15 local voluntary, community and faith groups to run their own heritage activities and projects. We also worked with over 20 volunteers across the borough to create a Historic Townships Exhibition which focused on local memories. This toolkit is based on what we learned during this time and provides a step-by-step guide to running your own heritage project from thinking of an idea to making sure your project has a legacy after it has been completed.

Heritage has an important role to play in promoting both individual and community wellbeing. Heritage projects can provide opportunities to develop skills and build confidence through volunteering, for example, whilst also helping to foster a sense of place and identity. Heritage includes all of us and should therefore be for everyone.

**Volunteering can present an ideal practical application of the five ways to wellbeing.**

## Five Ways to Wellbeing

**Connect**

**Be Active**

**Take  
Notice**

**Keep  
Learning**

**Give**



# Getting Started

Once you have decided that you would like to run a heritage project, where do you start? The first section of our toolkit helps you to think about how heritage might work for your group. We begin by outlining how to find an idea for a project and then provide for where to find out more so you can start to turn your idea into a more detailed project plan.

**The National Lottery Heritage Fund provide the following list of types of projects that are classed as heritage projects:**

- **Nature** – works to improve habitats or conserve species, as well as helping people to connect to nature in their daily lives.
- **Designed landscapes** – improving and conserving historic landscapes such as public parks, historic gardens and botanical gardens.
- **Landscapes and the countryside** large-scale rural projects that help improve landscapes for people and nature by, for example, restoring habitats and celebrating the cultural traditions of the land.
- **Oral history** recordings of people's stories, memories and songs, as a way of communicating and revealing the past.
- **Cultural traditions** exploring the history of different cultures through storytelling, or things that you do as part of your community. This could be anything from dance and theatre to food or clothing. It could also include the heritage of languages and dialects.
- **Community archaeology** involves the active participation of volunteers in archaeological activities, everything from investigating, photographing, surveying, excavation and finds processing. Sometimes called public archaeology
- **Historic buildings, monuments and the historic environment** – from houses and mills to caves and gardens. Areas that are connected to history and heritage.
- **Museums, libraries and archives** – making the collections that museums, libraries and archives hold more accessible through new displays, improving public buildings and galleries, or engaging people with interpreting new and existing collections.
- **Acquiring new objects** – help towards the cost of acquiring one-off objects or collections as part of a collections development policy.
- **Commemorations and celebrations** – telling the stories and histories of people, communities, places or events related to specific times and dates.
- **Industrial, maritime and transport** – this might be places and objects linked to our industrial, maritime and transport history.





## Your Idea

First of all, ask the people you plan to work with what interests them and what they would like to find out more about.

For example, if you are a park friends group who have been focusing on growing vegetables, your members might prefer a heritage project focused on nature and the environment.

In the box below, we have provided an example activity to use to get people thinking about their own connections to heritage and what matters to them.

### Activity: You Are Heritage



This activity will help people to think about their connections to the local area. Firstly, make sure that all members of your group have a pen and paper. Then ask everyone to think about a typical day for them, it could be last week or thirty years ago. Next read out the following questions for people to write or draw their answers to:

- **What places would you visit or spend the most time in? What would you do whilst there?** *Playing in a park, attending school or a place of work?*
- **Who would you go with or encounter whilst you are there?** *Your neighbours, friends, a teacher or colleague?*
- **How would you get to this place?** *A walk along the seafront, by train, cycle?*
- **Are there any smells or sounds that you associate with this particular day?** *Sea breeze, hot soup, oil or other fuels?*

If you ask these questions slowly and leave time in between each one, everyone will have chance to reflect on their own relationship with the local area. You might want to give some of the examples listed above to help to get people thinking.

Once everyone has got their answers, ask for people to share what they have on their page. Hopefully, those who have done the activity will start to find similarities, differences and things that have changed over time. Use this feedback to inform your idea for your heritage project.



Once you have completed the 'Your Are Heritage' activity, you should have a list of buildings, parks, activities people enjoy doing, and more.

Ask yourselves:

- **What would you like to learn more about?**
- **What would you like to make sure is remembered or preserved in the future?**
- **What sort of activity would help you to do this?** For example, could you hold an event to collect stories of a particular building, could you do a nature walk to identify plants and animals in an area, or could you create a new collection of items relating to a local community group?
- **Why is it important for you to do this activity now?** For example, does your group have an important anniversary coming up or are their building plans that will change the local area?

### Top tip



Defining the specific elements of heritage that your project will cover will really help you to create a strong project plan. For example, planning a project about memories of community events that have taken place in Crosby since the 1960s will be easier to plan than a project about Crosby's heritage as a whole.

## Finding Out More

There are many ways you can find out more about local heritage. Some of the following methods will be useful when you start to plan your project, for example, you might use the internet to find some historical context before you start your project plan. Other methods listed might be better suited as part of your project, for example, you might wish to carry out some oral history interviews during your project. You can choose which methods will be the most useful for you.

## Local Archives

Local archives contain a huge amount of information. In Sefton, the local archives are held in Crosby Library where you can find photographs and browse old issues of local newspapers such as the Formby Times or the Crosby Herald. You will also be able to ask about lots of other local records and documents. Before you visit, it is always a good idea to email or call to let the library know to expect you so they can prepare to help you the best they can.



Crosby Library, Wikimedia Commons Image By Phil Nash .

Before you head to Crosby Library, you can check their digital archive online here: <https://sefton-digital-archive.org/>



You can also access some online archives for free in any of Sefton's libraries with a library membership. To check which memberships are available to you, please ask a member of library staff.

There are also many records held in the Liverpool Record Office in Liverpool Central Library, and at The Atkinson, home to Southport Library. As many places in Sefton were part of Lancashire until 1974. Some records you might want to see could be in the Lancashire Archives in Preston. [Further details are included later in the Useful Information section].



## Personal and Community Archives

Some of the most interesting and underexplored parts of our local heritage are hidden away in cupboards, garages or lofts. Has your group got a filing cabinet of memorabilia and old records, such as event flyers or newsletters, you could look at and share? Do past and present members of your group still have crafts they made with you or certificates they received through being involved with you? Items like this can form the backbone of a truly community-led heritage project which is of interest to local people.

**Remember that if someone shares items and records with you that belong to them, you should make sure you get their permission in writing before you use them in your project.**



Officially, community-based archives are archives created and preserved by individuals and community groups who desire to document their cultural heritage. These collections are sometimes organised by formally trained archivists, historians, and librarians. If you wish to consider formalising your collection, you can discuss with the local archives if they would be interested in housing your items for you.

You can find out more about community archives here: [www.communityarchives.org.uk/](http://www.communityarchives.org.uk/)



**Top tip:** When you are looking at records in archives or online, try to take a note of any publishing or ownership information. If you wish to share your findings you might have to check the copyright before doing so. For example, you may have to gain permission from the copyright holder before displaying a photo in an exhibition and you might even have to pay a fee.



## Researching Online

The internet is full of information and sometimes finding what we are looking for can be more difficult than we might think. First of all, you should make a list of topics you would like to find out more about, you can narrow down this list later based on what you find. Use the key terms in this list in search engines to find out what others have already researched and shared.



Search engines are very effective, but remember they use an algorithm to rank the relevant pages into a set of results, so it is always worth trying different search terms or other methods of browsing online to see what you can find.

If you want to find an exact phrase try putting it in quotation marks, for example: “Formby Lifeboat”. If you want to find something even more specific, you can indicate what you do not wish to see, for example: Formby Lifeboat -pub.

You will find it useful to keep a log of where you have looked for and found information. This log will mean you can check information easily and can share it with others in your group.



## Assessing the Reliability of a Website

To find the most reliable websites for your research, you need to be able to evaluate the website itself. There are lots of different types of websites so it is important to understand the nature of where you are getting your information from.

- Websites run by **academic or government institutions** are usually reliable. Examples include a university webpage, a local government page outlining a historic event or The National Archives website.



- **Databases and specialised search engines** can help to provide strong results. JSTOR, for example, provides access to more than 12 million journal articles, books, images, and primary sources in 75 academic disciplines.
- **Online archives** such as the British Library's digital collections, Ancestry or Find My Past hold lots of historical records you can search.
- **Non-profit websites** aim to share their organisation's mission, make connections and entice people to participate in non-profit fundraising events. Typically, information shared by these types of websites will mirror the values of the organisation. Museum websites often fall into this category.
- **Magazine and news websites** will write with their own agendas and perspectives. Consider the intended audience of the article you are reading when deciding how to use it.
- **Blogs** are regularly updated websites or webpages run by an individual or small group. Blogs are usually conversational in style and share the views of their authors. When looking at a blog post, take note of the website it has been published on and who the author is.
- **Social media** can be a great tool for any project, however we must be careful when using it to find out information. For example, posts in a history group on Facebook might be based on personal experiences and estimates as opposed to in-depth research. If you are looking to find out more about personal experiences, social media can be very useful.
- **Wikipedia** is a free online encyclopaedia that has community-enforced policies on neutrality, reliability and notability. Anyone can edit or create on Wikipedia, but an online community of volunteers, administrators and bots ensure edits are based on reliable citations.

For more information about searching online, check the 'Useful Links' section of this toolkit.

## Oral History

Oral history refers to the collection and study of historical information using recordings of interviews with people who have personal knowledge of past events.



By speaking to people, we can find out how the past was experienced and what these experiences meant. Oral history is an important part of heritage because it:

- brings new perspectives and challenge our view of the past
- gives voice to people who have been excluded from traditional historical records





- documents traditions and stories passed down from generation to generation
- records the changing and enduring culture of a place or community or shifts in everyday practices
- contributes to the preservation of customs, dialects and ways of speaking
- connects people to others and their local area



## Things to Consider when using Oral History

### Memory

- Everyone forgets things as time goes by and we all remember things in different ways.
- All memories are a mixture of facts and opinions, and both are important.
- People are more likely to remember an exceptional event, something that caused strong emotions, memories they have retold many times, experiences that have become significant in hindsight, and stories that connect to significant events such as birthdays.

### The Interview

- Who do you want to interview and how will you find them?
- What people share in an oral history interview depends on the questions you ask and their relationship with the interviewer.
- Will you need to do a training session with staff, volunteers or members of your group to prepare them for carrying out an interview?
- Will you need Disclosure and Barring Service certificates for people involved in your project's interviews if you are working with children and/or vulnerable adults?

### Equipment

- How will you record your interviews? A dictaphone, film recorder or mobile phone?
- The quality of recording device you need will depend on how you intend to use the recordings. If you want to share them online, for example, you will need to make sure they are high quality.
- If you intend to use mobile phones, how will you keep track of where the recordings are, how they are being shared, and which permissions you will need to keep them on personal devices?



## Interview Planning

- Doing some background research and preparation before carrying out an oral history interview is very helpful. For example, if you want to ask people about popular childhood toys, you might want to find some examples to help prompt people's memories.
- Create a list of themes or topics that you would like to cover and outline a couple of questions for each. Try to group the themes, topics or questions you want to cover in a logical way. Often a chronological structure helps people to remember.
- Try to make sure your questions are open-ended. For example, instead of asking someone if they had a job, you could elaborate by asking them to describe what a typical day at work looked like for them.
- Once you have these questions, you do not have to stick to your interview plan as people might start to discuss an interesting topic you had not thought about. However, making the plan will help the interview run smoothly.

## Permissions

Before you record someone's memories, you must explain the purpose of the recording and how you will use it. You will then need to make sure you have their permission to record and use the information they have shared. The following two agreements are usually sufficient:

- **A Participation Agreement** helps to ensure you are abiding by the General Data Protection Regulation. On this form, you should include the aims and objectives of the project, what personal data will be collected, where it will be stored, how it will be used, the legal basis for its use, and how the interviewee can contact the project to access their data. The agreement confirms that the interviewee is aware of how their interview will be used and would like to take part.
- **An Oral History Recording Agreement** covers copyright and access conditions, therefore it should be completed once the interview has finished. This form is a chance for interviewees to restrict all or part of their interview and provides the interviewer an opportunity to highlight any parts of the recording which might contain 'sensitive personal data' about third parties mentioned.
- **Remember:** if you are storing the interviews long term online, in your records or in a local archive this needs to be clear in the participation agreement. Sometimes a local archive will have their own requirements for you to include or an extra agreement form to complete.



## Example Oral History Interview

- 1** Explain to the interviewee how the interview will be used in your project, for example, its content will feature in an exhibition that will also be shared online. Outline the key information on the Participation Agreement and ask the interviewee if they have any questions. Once you have answered these questions, you can ask the interviewee to confirm that they want to take part by signing the document.
- 2** Explain how you will do the interview and then turn on the voice recorder.
- 3** Begin by asking the interviewee for some basic details of their life, their name, when they were born and where, how long they have lived in the local area and perhaps a little bit about their childhood.
- 4** Use your interview plan to ask questions, but remember you do not have to stick rigidly to what is on your plan. Let the interviewee talk and use follow up questions to respond to what they have said.
- 5** When the interview ends, turn off the voice recorder.
- 6** Ask the interviewee how they are and discuss the Recording Agreement with them. This conversation will include any restrictions they might want to impose. For example, they might have talked about something they do not want to be shared publicly.
- 7** Follow up with your interviewee at a later date to let them know how you have used their interview.

## Natural Heritage and the Environment

Every project can and should consider the environment. For example, your group might commit to using more recycled materials or to not buying any new plastic equipment. However, this section provides some guidance for projects that are focused specifically on natural heritage and the environment.

Landscapes, ancient woods, plants, and habitats are essential for our survival and wellbeing so your project could make a big difference.



**Environmental conservation** entails stopping the loss of or supporting functioning ecosystems. For example, you might wish to create a pond, plant bee-friendly flowers or use recycling to create a wormery. A great place to start thinking about environmental conservation is the government's latest biodiversity plan. You can find the 2020 plan here: [www.gov.uk/government/publications/biodiversity-2020-a-strategy-for-england-s-wildlife-and-ecosystem-services](https://www.gov.uk/government/publications/biodiversity-2020-a-strategy-for-england-s-wildlife-and-ecosystem-services)



Some conservation work can take years, so demonstrating a long-term plan to ensure the site or species can be monitored will be essential. This might involve partnership work with the local council, a Local Nature Partnership or other specialist group. These types of partnerships could also really strengthen a funding application.

Ecological surveys can help you to understand the value of the site you are working with so that you can try to plan what to focus on. An ecological survey could be incorporated into any heritage work on a historic building, public park, garden, or landscape to make sure your project takes precautions to avoid damaging habitats and species, especially those protected by law such as badgers.

Whatever your project idea, make sure you are aware of any permissions you might need from landowners and/or Sefton Council before you start.

**Providing access to natural heritage sites** where practical can be of great value to the community. Your project might improve footpaths in a local reserve or introduce cameras to a woodland to allow local residents to watch birds and hedgehogs. However, fragile habitats and species can be damaged by such interventions. You might need to consider zones or levels of access. For example, some areas might have to be closed to the public during breeding or nesting seasons.

**Growing projects** can teach people about soil, nutrition and life cycles as well as provide an insight to how people have grown food historically. Projects that focus on growing have a number of practical considerations such as equipment storage, access to toilets, site security, water supplies and the distance from buildings such as homes and schools. For more information see: [www.rhs.org.uk/get-involved/community-gardening/resources/community-garden](https://www.rhs.org.uk/get-involved/community-gardening/resources/community-garden)

**Sharing your findings** is an important part of any natural heritage project. As part of your project you might take photographs, create drawings, compile data sheets, update a website or use an app to track habitat information. As well as sharing this information in your own networks, you might wish to consider sharing it with the National Biodiversity Network ([www.nbn.org.uk](https://www.nbn.org.uk)) captures wildlife data in one standard format so information from across the nation can be integrated, compared and accessed easily.



# Built Heritage

Built heritage refers to buildings, structures, monuments, installations or remains associated with the past. Your idea for a heritage project might include helping to restore a building of historical significance, looking after and learning about a local memorial, or erecting a sculpture to commemorate or celebrate a person, community or event. In most instances, a project focusing on built heritage will require consultation with landowners and the local authority.



Southport Promenade Hospital. Photograph by Samantha Fulstow.

There are over 800 listed buildings in Sefton which means they are of special architectural and historic interest. A listed building has to be considered in the planning system so that it can be protected for future generations. Locally in Merseyside, there is also the Local Heritage List which covers Knowsley, Sefton and the Wirral. The public can identify and nominate buildings for the Local Heritage List which means they too can be afforded consideration in planning applications. Find out more here:

**[local-heritagelist.org.uk/merseyside](http://local-heritagelist.org.uk/merseyside)**



South Road Prefabs, Bootle. © Sefton Libraries

For more advice and information about built heritage see:

- [www.heritagetrustnetwork.org.uk/](http://www.heritagetrustnetwork.org.uk/)
- [historicengland.org.uk/advice/find/](http://historicengland.org.uk/advice/find/)
- [www.heritagefund.org.uk/funding/good-practice-guidance/building-maintenance-guidance](http://www.heritagefund.org.uk/funding/good-practice-guidance/building-maintenance-guidance)



Potter's Barn, Waterloo. © Sefton Libraries

# Planning Your Project

Once you have a strong idea and some background information, you can start to plan exactly how you will run your heritage project. In this section of the toolkit, you can follow two example projects to help you to create your own project plan. You will need to consider why your project is important, who your project is aimed at, what your project will do, when your project will take place, where it will happen, and how much it will all cost.

## 1 Example Project 1

**A park friends group want to restore a memorial to two Victorian philanthropists who founded a local voluntary hospital.**

## 2 Example Project 2

**A drama group want to draw upon local people's memories to create a performance for an upcoming community event.**

## Why?

Thinking about why you want to run your heritage project and the wider benefits it might have on your community with help to strengthen your project plan and any funding application.

### Why is this project important for your group?

For example:

- Will the project help your group to develop skills and connections to make you more resilient in the future?
- Will your project help you to attract crucial volunteers or new members?
- Does your project celebrate a special occasion for your group?

### Why is this project useful for the wider community?

For example:

- Will your project reach isolated people in your community?
- Will your project improve a particular space in your community?
- Will your project improve wellbeing?

### Why do you need to do this project now?

- Has there been a recent government or non-profit report highlighting a need for a project like yours?
- Is the heritage you want to focus on at risk or underexplored?
- Is there a community event you would like to contribute to through your project activity?



## **1 Example Project 1**

- a) The park friends group are looking to build expertise and get more volunteers to join their team. A project to restore the memorial, including the surrounding medicinal garden, and create a new information board would help their volunteers to develop key skills in preserving and maintaining the park's flora and fauna as well as their research and organisation skills. By researching the origins of the voluntary hospital and the philanthropists behind it, the group can help provide visitors to the park with more information and will invite local primary school students to be the first to look at their new information board and accompanying booklet.
- b) This project will help to attract local people into the park to make the most of the green spaces in the area. For example, school children, who might not have visited to park before, could tell their families and return with them. Posts on social media about activities happening in the park could also help increase visitor numbers and desire for future activity to take place which would boost community cohesion and wellbeing.
- c) This project needs to take place this year because the building of the voluntary hospital, which is now local offices, is turning 175 years old. Since the Covid-19 pandemic began, peoples' relationships with their local parks has changed dramatically. The continuing importance of parks as spaces for stress relief and relaxation help people to stay healthy, socialise and build community whilst connecting with nature. As a parks friends group, we believe continuing this momentum is important now lockdown rules are no longer in place.

## **2 Example Project 2**

- a) This heritage project is important for our group because we have a high number of new members in the drama group, some of which have recently moved to the area and would like to find out more about its heritage. Using oral history to discuss local memories will help people to connect and find out more about where they live.
- b) The wider community will benefit from this project as we will partner with a local care home to record some memories of their residents. We will then share the stories told in a performance at the care home and at a local community event.
- c) The timing of this project is crucial as our performance will coincide with an upcoming community event which is aimed at kickstarting the regeneration of the town centre. Sefton also has high numbers of socially isolated older people who we will be reaching through our project.



# Who?

Your answers to why you want to do your heritage project will hopefully already have started to outline who will be involved. Identifying exactly who your project is aimed at will help you to solidify your project plans. Firstly, think about the type of engagement you anticipate. Will your project be led by volunteers you already have in place or will you need new volunteers? Are your sessions going to be run with existing group members or will you open up your heritage activities to the public?

You will also have to think about who you would like to involve. Are you wanting to include children and young people, people with disabilities, people from diverse ethnic background, or members of the LGBTQ+ community? Please see the section on inclusivity for more information.

## 1 Example Project 1

**Volunteers who already help look after the park will lead the project and hopefully new volunteers will become involved. The project will also focus on local children who might not have visited or know much about the park, wider members of the public who visit the park. We will need to work with a designer and printer to create the booklet too.**

## 2 Example Project 2

**Members of our drama group who have not engaged with heritage before, residents of a local care home, wider public through performance.**

# What, When, Where?

Once you know why you are doing your project and who it is for, you can start to think about the best ways to deliver your project. At this stage of project planning, you need to think carefully about your group's capacity and what you might need to do to ensure your project succeeds.



## 1 Example One

The memorial project will take place in the park between April and June during our group's usual sessions on Tuesday mornings (10am-12:00pm) and Thursday afternoons (1:00pm-3:00pm). We will also arrange to meet at a local library to research the local voluntary hospital in 5 additional sessions which will be open to our group members as well as new volunteers who might wish to become involved. We will then work with a local designer and printer to create the booklet before we invite schools to visit the memorial.

## 2 Example Two

We will focus half of our usual sessions on the heritage project for 12 weeks and begin by asking our own members about their memories and local places that interest them. In the middle of these 12 weeks, we will arrange up to 5 additional sessions with a local care home to carry out some oral history recordings. After we have done these recordings, we will need to spend time listening to them and transcribing them so we can turn them into a script for our performance. We will have three volunteers whose role it is to help with this part of the project. Once the script is ready, we will rehearse it ready to perform in the town centre.

## How Much?

Once you have an outline of exactly the type of activity you would like to take place during your project, you must start to think about the logistics and costs of carrying it out.

Some applications might have space for you to outline match or in-kind contributions. Here you can list any other funding you plan to put towards your project as well as volunteer hours or venue use.



# Getting People Involved

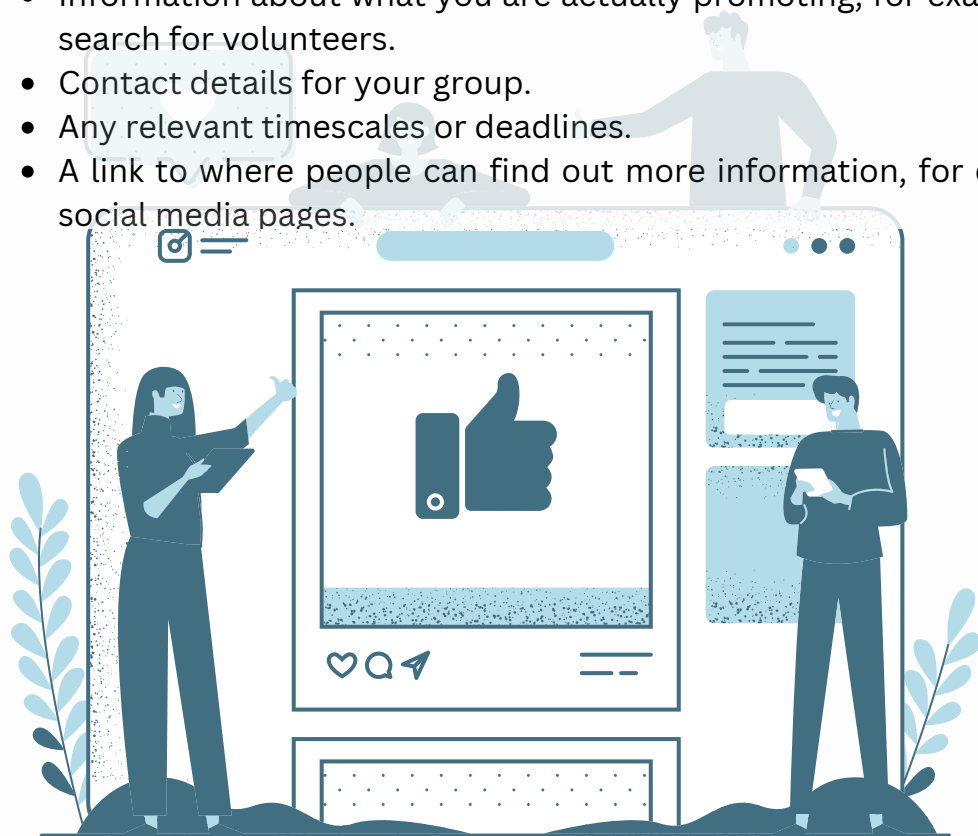
How are you going to get the message out about your project and what you need for it to happen? You might already have established a newsletter or social media page to help share news from your group. Utilising what already works well for you can be great. However, if you want to reach new people or different types of people you might wish to consider different ways to communicate what you are doing.

Start by announcing that your project is taking place to your group and through your usual communication methods, for example a WhatsApp group or Facebook page. Then find out what media is available to you in your area, is there a local news organisation or radio station you could approach? Are there any community noticeboards you could ask to put information on? Could you connect with other local groups, activities and events? Think about where you find out information locally and start from there. If possible, you should try to consider any events taking place locally so that your announcements do not coincide insensitively with news such as significant local job losses for example.

Plan what you would like to share carefully. You will need to grab people's attention and use good quality images to help spread your message.

What to include on promotional material:

- Your group name.
- A clear outline of your project.
- Information about what you are actually promoting, for example, a specific event or search for volunteers.
- Contact details for your group.
- Any relevant timescales or deadlines.
- A link to where people can find out more information, for example your website or social media pages.



# Inclusivity

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.

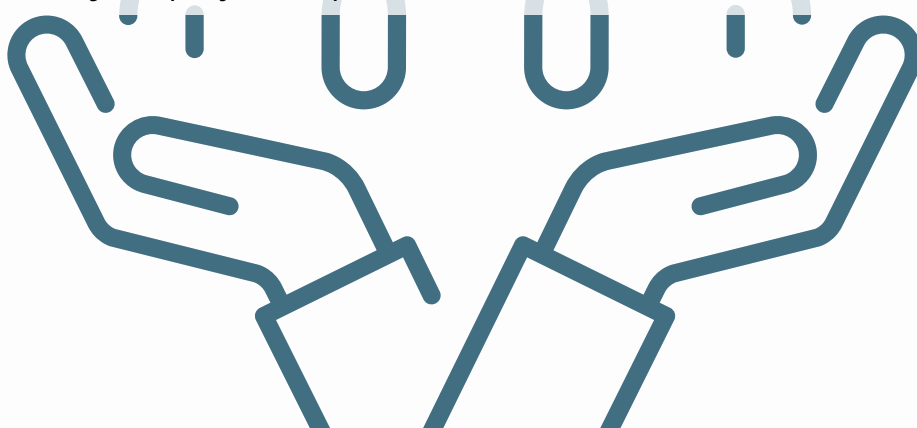
The Equality Act (and Section 75 in Northern Ireland), asks us and other public bodies to advance equality of opportunity for people who have a 'protected characteristic'. This includes: age (including young people aged 11-25 and older people), disability, gender reassignment, race, religion or belief, sex and sexual orientation. People with these characteristics can experience barriers to being involved in heritage and are generally under-served 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.

## What can you do?

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.
- 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.
- There are many ways you could embed inclusion into your project. Recruit and retain a more diverse range of volunteers or ensure your website and publicity materials might not be on white backgrounds, include travel expenses for volunteers if your project requires it.



## Partnership Working

Once you have identified your audience and what they might need to take part, consider potential partners to help you plan and possibly deliver the activities or changes you want to make. 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.

*Top Tip: **Check out the 'Here For You Directory' here***

## Safeguarding

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.

Sefton CVS's Safeguarding Toolkit Here: [\*\*seftoncvss.org.uk/resources/\*\*](https://seftoncvss.org.uk/resources/)



# Monitoring and Evaluation

Monitoring refers to keeping track of what you are doing and what you are achieving. Monitoring involves gathering relevant information, facts and figures, and asking key people in your group for feedback – including volunteers, participants, audiences and visitors. Evaluation is about using information that you collect to make a judgement about how successful your project has been in making the difference you intended to the people that you set out to support.

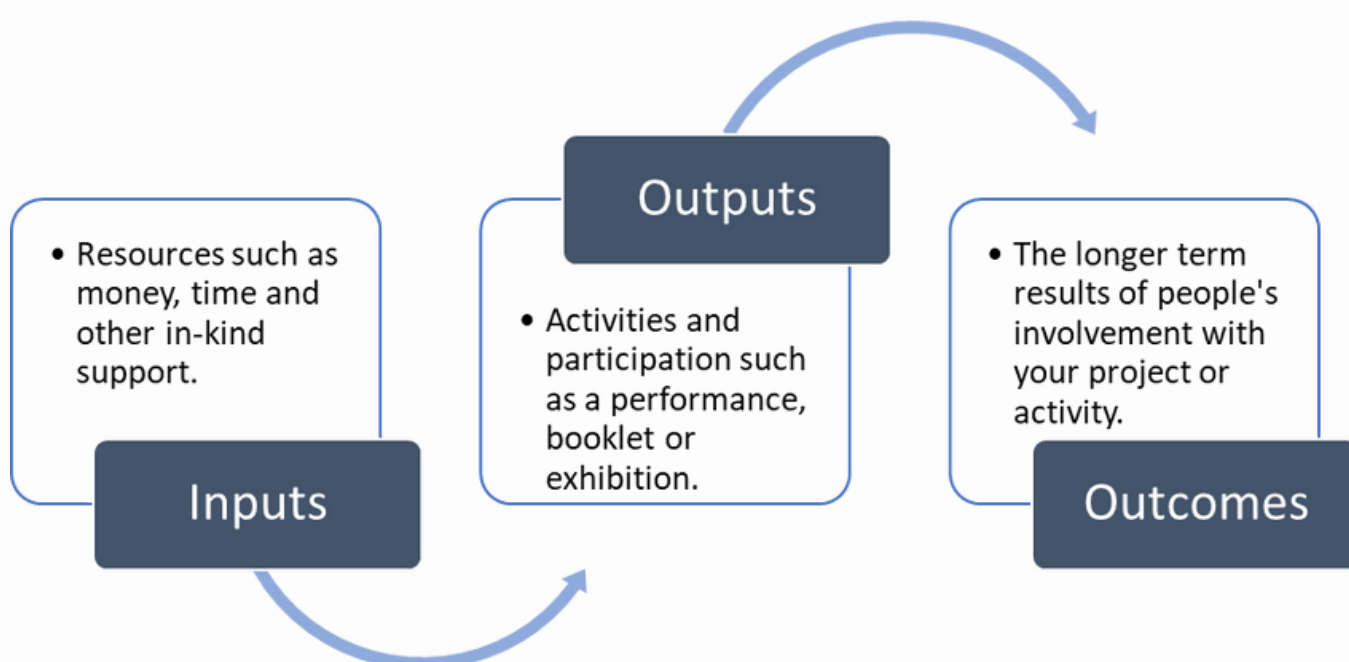
There are two types of information to think about collecting:

- Quantitative information such as how many participants, how many volunteers or attendees, how many activities, events or performances that you run. This data led evidence relating to actions may be referred to as 'outputs'.
- Qualitative information such as feedback from volunteers, participants or attendees relating to impact and any change produced by the activity. This more wordy descriptive information is referred to as 'outcomes'.

## Why is Monitoring and Evaluation so important?

Monitoring and evaluation will help you learn from your project by helping you to understand what worked well, what did not, and why. You can develop from your learning and include insights of it into future projects, and funding applications, to help your group to grow.

There are three main aspects to consider when thinking about monitoring and evaluation:



# Your Legacy

A lasting impact is a sign of a good project. Your legacy might be tied to your intended outcomes, for example, the people who have been involved in your project feel more confident to take part in community activities or volunteers have gained skills that have helped them to find employment. Your group might have also benefited from your heritage project through improved communication and organisation or the creation of new partnerships. A significant part of your legacy will be sharing information and making it accessible.

## Sharing Information

Any heritage project will result in uncovering and preserving information through, for example, oral history interviews, species counts, or the creation of heritage trails. Below are some examples you could consider for making sure your project continues to have an impact after it is completed.

You might:

- ask a local archive to preserve your oral history interviews.
- create and share a child-friendly booklet with local schools.
- install a new information board in a local park.
- publish a zine that outlines how to grow your own vegetables.
- provide participants and partners with a copy of your documentary.

Your project might have provided some good insight into project management, evaluation methods or digital accessibility. A lasting legacy could be that you turn your experiences into a training workshop or guidance booklet such as this toolkit.

## Going Digital

Digital technology can help you to expand the reach of your heritage project and provide a platform for a lasting legacy. If you have a website and/or social media pages, you could post any outputs from your heritage project online so that they are available to the public. For example, if your project has recreated a series of old photographs of your local area, you could share an online gallery to post the 'Then and Now' images for others to see.

Posting online does not automatically mean people will see what you have been doing. Making sure you have relevant, interesting and good quality content to share will really help to boost your audience. If you are looking to create a website or begin posting on social media for the first time, you might wish to take part in some training beforehand to make the process easier. If there are costs involved for this training, you can include them in a funding application.



The National Lottery Heritage Fund have been working on Digital Skills for Heritage since 2020. You can find out more here: [www.heritagefund.org.uk/our-work/digital-skills-heritage](http://www.heritagefund.org.uk/our-work/digital-skills-heritage).

Their good practice guidance for online accessibility is also full of advice and guidance: [www.heritagefund.org.uk/funding/good-practice-guidance/introduction-online-accessibility](http://www.heritagefund.org.uk/funding/good-practice-guidance/introduction-online-accessibility)

The National Lottery Heritage Fund support Heritage Digital - [charitydigital.org.uk/heritage-digital](http://charitydigital.org.uk/heritage-digital) - which provides webinars and resources that you can access to help you on your digital journey. Example topics include: copyright considerations for digital services, engagement and outreach with youth audiences, and building and growing your audience with digital.

Digital Heritage Lab was also part of the National Lottery Heritage Fund's Digital Skills for Heritage initiative and has an archive of resources you can refer to: [www.a-m-a.co.uk/digital-heritage-lab/](http://www.a-m-a.co.uk/digital-heritage-lab/)

## Further Support

Sefton CVS provides support for the borough's voluntary, community and faith sector with a wide range of information and resources available at [seftoncvcs.org.uk/](http://seftoncvcs.org.uk/)

This includes advice on group governance, policies and procedures as well as services include training, community accountancy and events.

Sefton CVS provides a Volunteer Centre [volunteeringsefton.org.uk/](http://volunteeringsefton.org.uk/) with guidance and materials to assist volunteer recruitment and management

The Merseyside Funding Information Portal [mfip.org.uk/](http://mfip.org.uk/) provides information and links to current local, regional and national funding programmes and opportunities.



# Useful Information

## Heritage Project Support:

Oral History Society - [www.ohs.org.uk/for-beginners/](http://www.ohs.org.uk/for-beginners/)

Good Practice Guidance from the National Lottery Heritage Fund -

[www.heritagefund.org.uk/funding/good-practice-guidance](http://www.heritagefund.org.uk/funding/good-practice-guidance)

Digital Heritage Lab - [www.a-m-a.co.uk/digital-heritage-lab/](http://www.a-m-a.co.uk/digital-heritage-lab/)

Heritage Digital - [charitydigital.org.uk/heritage-digital](http://charitydigital.org.uk/heritage-digital)

Advice from Historic England - <https://historicengland.org.uk/advice/find/>

National Trust: Discover & Learn - [www.nationaltrust.org.uk/discover](http://www.nationaltrust.org.uk/discover)

National Biodiversity Network - [www.nbn.org.uk](http://www.nbn.org.uk)

Heritage Gateway - [www.heritagegateway.org.uk/gateway/](http://www.heritagegateway.org.uk/gateway/)

Parks & Gardens - [www.parksandgardens.org/](http://www.parksandgardens.org/)

## Local Resources:

Aintree Parish History - [aintreevillageparishcouncil.gov.uk/the-parish/parish-history/](http://aintreevillageparishcouncil.gov.uk/the-parish/parish-history/)

The Atkinson - [www.theatkinson.co.uk/whats-on/exhibitions/](http://www.theatkinson.co.uk/whats-on/exhibitions/)

Bootle Times - [www.bootlehistory.co.uk/](http://www.bootlehistory.co.uk/)

Formby Civic Society - [formbycivicsociety.org.uk/](http://formbycivicsociety.org.uk/)

Going to the Pictures, Cinema Heritage Project, The Plaza - [goingtothepictures.org.uk/](http://goingtothepictures.org.uk/)

Green Sefton - [www.sefton.gov.uk/around-sefton/green-sefton/](http://www.sefton.gov.uk/around-sefton/green-sefton/)

Historic Liverpool - [historic-liverpool.co.uk/](http://historic-liverpool.co.uk/)

Hugh Hollinghurst, Sefton in 50 Buildings (book).

Hugh Hollinghurst, Sefton: The Postcard Collection (book).

I Grew Up In Maghull - [www.igrewupinmaghull.com/places](http://www.igrewupinmaghull.com/places)

Kingsley & Co, Horrid History Map of Bootle - [www.kingsleyandco.org/horridhistorymap](http://www.kingsleyandco.org/horridhistorymap)

Lancashire Archives - [www.lancashire.gov.uk/libraries-and-archives/archives-and-record-office/](http://www.lancashire.gov.uk/libraries-and-archives/archives-and-record-office/)



# Useful Information Cont.

Liverpool Record Office - [archive.liverpool.gov.uk/calmview/](https://archive.liverpool.gov.uk/calmview/)

Maritime Archives - [www.liverpoolmuseums.org.uk/archives-centre/about-archive-centre](https://www.liverpoolmuseums.org.uk/archives-centre/about-archive-centre)

Sefton Looking Back - [sefton-digital-archive.org/](https://sefton-digital-archive.org/)

## Online Archives

Ancestry - [www.ancestry.co.uk/](https://www.ancestry.co.uk/)

Britain from Above - [www.britainfromabove.org.uk/](https://www.britainfromabove.org.uk/)

British History Online - [www.british-history.ac.uk/](https://www.british-history.ac.uk/)

British Library - [www.bl.uk/](https://www.bl.uk/)

British Newspaper Archive - [www.britishnewspaperarchive.co.uk/](https://www.britishnewspaperarchive.co.uk/)

Find My Past - [www.findmypast.co.uk/](https://www.findmypast.co.uk/)

National Heritage List - [historicengland.org.uk/listing/the-list/](https://historicengland.org.uk/listing/the-list/)

National Library of Scotland: Maps - [maps.nls.uk/](https://maps.nls.uk/)

Pictures of England: Photography & History - [www.picturesofengland.com/](https://www.picturesofengland.com/)

Prefab Museum - [www.prefabmuseum.uk/](https://www.prefabmuseum.uk/)

UK Photo Archive - [www.ukphotoarchive.org.uk/](https://www.ukphotoarchive.org.uk/)

Youth Culture Archive - [subculturearchives.com/](https://subculturearchives.com/)

