Audience development plans

helping your application…

Heritage Lottery Fund

helping your application . . .

Since 1995, we have been distributing funds from the National Lottery to help organisations of all sizes achieve successful projects across the whole range of heritage. The benefits of all the hard work represented by these projects are now being enjoyed by people across the UK, and many parts of our heritage are much more accessible and in better condition as a result.

Contents

Introduction

helping your application . . .

We have designed this booklet to help you apply for a Project Planning Grant to create an Audience Development Plan. If we award a Project Planning Grant, we expect it will lead to an application for a Heritage Grant (that is a grant of £50,000 or more). But in any event, we expect the work carried out with the help of the Project Planning Grant to be of value to your organisation in its future development. If we award a Project Planning Grant, it is no guarantee that we will fund your final project. That will depend on the nature and quality of your application.

We hope this booklet will stimulate your thinking and help you to assess your organisation's ability and aims in getting more people involved in their heritage. This booklet focuses on Audience Development Plans and what you need to do to create one. Please read the booklet with the guidance notes for Project Planning Grants in the application pack, which will help you to fill in the application form itself.

You can get more copies by phoning our helpline on 020 7591 6042 or contacting us by textphone on 020 7591 6055. The booklet is also available in large print, in Welsh and on audio-cassette in English. If English is not your first language, we can provide a translation if you ask us.

remember!

You can call our helpline on 020 7591 6042 if you have any questions or need help.

Definitions

This booklet draws on a wide range of policy documents, guidance and research from all the sectors where we work, and to be successful it demands a shared understanding of terms. In this booklet we are using the following definitions.

Heritage and heritage items can refer to:

- historic buildings;
- records and collections held in museums, archives and special libraries, or photographic collections;
- oral history (recording people's experiences);
- language heritage;
- the countryside and habitats, and 'priority species' listed in the UK Biodiversity Action Plan;
- designed landscapes; and
- objects and sites linked to our industrial, maritime and transport history.

Audiences refers to:

- visitors to sites and collections;
- people who use facilities and services, including remote users, for example, people using a website;
- people who take part in heritage activity;
- people who work in the sector, on a paid or voluntary basis;
- people who sit on governing bodies; and
- people who support the heritage, for example, as members of Friends groups or heritage organisations.

Improving access

To increase access is to remove the barriers which prevent people gaining the maximum benefit from their involvement with your heritage site or collection. It means finding new solutions to the difficulties presented by:

- where your site is;
- your buildings;
- the nature of the material in your collection or on display;
- the ways in which you provide information about your heritage item; and
- the image you present to actual or potential visitors and users.

The barriers which limit access may be organisational, cultural, physical, sensory, intellectual or financial. There may also be legal requirements you need to meet such as the Disability Discrimination Act. Thinking about how to improve access is a necessary first step to developing your audiences.

Social exclusion

The Social Exclusion Unit uses the following definition.

'Social exclusion is a shorthand term for what can happen when people or areas suffer from a combination of linked problems such as unemployment, poor skills, low incomes, poor housing, high crime environments, bad health and family breakdown.'

These problems may be barriers to people's involvement in many aspects of social and cultural life, including heritage activity. Heritage organisations who want to deal with social exclusion are part of a much larger process of social change and are usually most successful in partnership with other agencies working to tackle the causes of social exclusion.

Under-represented audiences

Research into visitors and users in the heritage sector shows that some heritage activity only attracts certain groups of people. For example:

- a small, remote industrial heritage site may attract many more men than women and no children at all;
- people with low incomes do not visit the countryside as much as those with higher incomes; and
- in many parts of the United Kingdom, people from ethnic-minority communities do not use local archives.

These audiences can be said to be under-represented in terms of their profile at the particular heritage site or collection. However, they may not be socially-excluded in terms of the Government definition as they may not experience the problems which lead to social exclusion. While there is often an overlap between socially excluded audiences and under-represented audiences, the two are not necessarily the same.

Section 1

What is audience development?

Every heritage site, collection or activity involves people in one way or another, for example as:

- visitors or users of services and facilities;
- participants in events or education programmes;
- staff or volunteers;
- members of a Friends group or governing body;
- enthusiasts; or
- local residents.

However large or small the heritage organisation, there is always room to do more to attract and keep people's interest, and to help them to learn about and enjoy their heritage. The actions we take to involve people, to understand their needs and interests, and to create an environment and experience that appeals to them, are the main elements of audience development.

For any organisation there are many reasons for investing in audience development.

- A moral obligation to make sure that publicly-funded services provide the greatest possible benefit for the public.
- National or local programmes to regenerate communities.
- A desire to help build a sense of identity in the local community.
- The need to supplement limited public funding with other sources of income.
- Competition from other leisure attractions.
- The desire to work with other organisations with similar aims at a local, regional or national level.

Also, all heritage organisations need to build loyal and committed audiences, not just for their own short-term survival but for the future of our heritage itself.

Building bridges, a guide to developing new audiences for museums and galleries, concludes that 'the risks [of audience development] can be high and the process is long term, but it is certainly worth undertaking when the outcome will be an organisation which is outward-looking and responsive to the changing needs of society, and which has a more secure future'.

Jocelyn Dodd and Richard Sandell, *Building bridges: guidance for museums and galleries on developing new audiences*, Museums and Galleries Commission, 1998.

Section 2
What is an Audience Development Plan?

Before carrying out activities that are designed to attract specific audiences for a heritage activity, organisations need a good understanding of the environment in which they work and the stage they have reached in their own development.

Ask yourself these questions.

- What are we, as a heritage organisation, trying to achieve?
- How does audience development fit in with our corporate or business objectives (that is, goals or targets that we have set)?
- Are we ready to carry out audience development work?
- Do we have the necessary supporting policies (for example, access, education, equal opportunities, conservation and training)?
- Do we have the necessary skills and resources?
- Who are our audiences now?
- Who do we want our audiences to be in the future?
- How do we reach them?
- What will we offer them?

An Audience Development Plan is a framework for answering these questions and for planning the specific activities that will allow you to reach your target audiences and to offer them a high-quality experience. It offers a systematic approach which you can adapt to meet your organisation's circumstances and needs. It should also be seen as a living document which you review and update regularly as your organisation and audience develop.

remember!

Your audience development plan needs to be rooted in what your organisation wants to achieve in the future.

Section 2 continued
What is an Audience Development Plan?

There is no set rule for what should be in an Audience Development Plan, or how you should create it. A good Audience Development Plan will include:

- a description of your heritage site, collection or item;
- the aims of your heritage site, collection or item;
- evidence of the consultation you have carried out;
- an analysis of your current audiences;
- an analysis of the barriers to involvement;
- an assessment of the potential for audience development;
- objectives for audience development with priority audiences and measurable targets; and
- an action plan to achieve the objectives for each target audience.

The next section of this booklet presents a framework for creating an Audience Development Plan, which you can adapt for your organisation's particular circumstances.

The framework is a guide to the issues that you need to consider when applying for a Heritage Lottery Fund grant to create an Audience Development Plan.
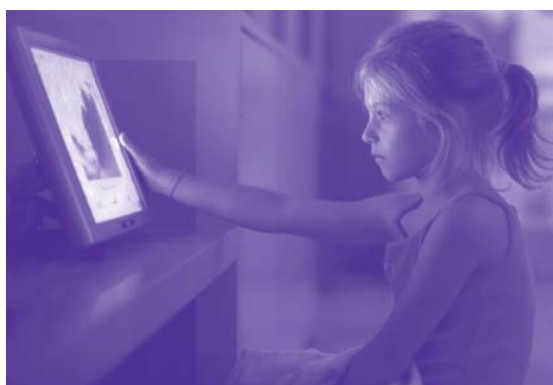
top tip ...

Before you start, collect all your documents together.

3

Section 3

Guide to creating an Audience Development Plan

There are four steps to creating your Audience Development Plan. Each step involves both internal and external consultation, and should always take place in the context of the overall objectives and the particular circumstances of your organisation.

For each stage, our framework deals with:

⊘ the issues you need to consider;

⊕ the tools you might use;

⊕ the help and resources you might need; and

ⓘ sources of information and advice.

Step 1: Where your organisation is now

This step is mainly concerned with assessing the current position of your organisation and getting the commitment of key people to the process you are carrying out. The plan should describe your heritage site, collection or item and your organisation.

The plan should cover:

- what and where your heritage item is;
- the significance and value of your heritage item;
- the services and facilities you offer the public;
- the management of your heritage item;
- the local environment, for example, type of area, population profile and transport links;
- your mission statement;
- your policy framework;
- the objectives of your strategic, corporate plan or business plans;
- the reasoning behind audience development activities;
- the key stakeholders, internal and external, in the proposed work; and
- related major initiatives.

While the ideal is to take a broad organisational approach to audience development, it is easy to get stuck at step one because you are trying to involve everyone and make everything perfect in your organisation. It is better to gain the commitment of key people at step one and to present a way forward through the plan itself. You can make renewed efforts to gain wider commitment to putting the plan into action once you reach steps three and four.

Section 3 continued

Guide to creating an Audience Development Plan

Step 1: continued

This step of developing the plan may throw up issues that are much wider than audience development. Examples are policy, staffing or organisational structure. You may need to refer issues to other people in your organisation as the Audience Development Plan cannot solve every issue.

⚠ **Issues to consider**

Why do you want to do audience development work?

How does it fit with your organisation's aims, strategies and plans in the short, medium and long term?

What will you do within your organisation if it does not fit as well as you would like?

How does audience development relate to protecting your heritage item?

Who needs to be involved in the process of thinking about audience development and creating an Audience Development Plan?

How will you involve them?

When is the best time to involve them?

Whose commitment do you need and how will you get it?

What level of organisational commitment is there to access and audience development?

What level of knowledge and awareness is there among staff, volunteers and governors about audience development?

How will you raise the levels of commitment and awareness?

How good is access to your heritage item?

Which documents do you need to produce to show the context in your organisation for this work? For example:

- mission statement and corporate plan;
- key policies, for example, access, education, equal opportunities and conservation;
- project plans for major initiatives, for example, conservation, education or digitisation programmes; and
- recent research or audits, for example, an access audit.

remember!

You can call our helpline on 020 7591 6042 if you have any questions or need help.

Which external documents do you need? For example:

- national, regional or local policy documents, for example, regional and local cultural strategies, research and reports that are specific to your heritage sector;
- guidance and good-practice guides for your sector (or for other sectors to broaden your horizons); and
- local tourism research.

☉ Tools

Presentations to staff, volunteers and governors at team meetings, volunteer training sessions or board meetings.

Internal publicity through e-mail, the intranet, newsletters and notice boards for staff, volunteers and governors.

Publicity to Friends organisation and other stakeholders.

Networking, for example, attending events to hear about related local initiatives or visiting other organisations to learn from their experience.

⊕ Help and resources

Co-operation of staff, volunteers and governors.

Commitment of key people in your organisation and other stakeholders.

Budget for professional development to increase people's understanding of the main issues, for example, attending external seminars and events, and holding awareness sessions for staff, volunteers, governors and others.

ⓘ Sources of information and advice

Local networks, for example, local-authority culture, tourism, leisure and environment officers.

National organisations, for example, Museums Association, English Heritage, Countryside Agency and Disability Rights Commission.

(See section 6 for publications and internet sources.)

remember!

Make use of all the existing information about your current audiences and what they think of your services.

Section 3 continued

Guide to creating an Audience Development Plan

Step 2: Understanding your current audiences and the barriers that prevent people from taking part

This is a stage of practical research, consultation and analysis. Your plan should summarise the findings of your research into your current audiences and the barriers that prevent people taking part, with the full findings available for use by anyone involved in the project. The plan should present your analysis of the research and consultation, with the effect it might have on your organisation.

⚠ Issues to consider

Who are your current audiences?

What do you know about them already?

What do you need to find out about them?

Who are not your current audiences?

Who may be excluded from being a current visitor or user?

What do you need to find out about them?

How will you consult your audiences?

Who else do you need to talk to?

How can you consult those who do not visit or use your services at the moment?

Analyse your current audience profile in a way that is useful to you, for example by:

- age or sex;
- social group;
- purpose of visit or use;
- whether or not it is their first visit; and
- how satisfied they are with what you offer.

What are the barriers to greater involvement?

How does the profile of your staff, volunteers and governors compare with that of your current audiences?

Who are your current partners?

What barriers are there to further developing partnerships?

Who can carry out the necessary research and analysis? For example, existing staff, volunteers, Friends, students on projects, temporary staff recruited for the project and specialist interviewers.

Do people need training to allow them to take part in this stage of the project?

Tools

You could use the frameworks in appendix A to stimulate thinking about your audiences and the barriers to greater involvement.

Current visitor or user information, for example, survey responses, ticketing systems data, comments books, feedback forms or other information.

Evaluation of recent or current projects and initiatives.

Market research data.

Related work, for example, access audits and access plans.

Visitor and user surveys, carried out by an interviewer or to be completed by visitors or users themselves.

Focus groups.

Help and resources

You might need specialist help with:

- consulting specific audiences;
- designing, conducting and analysing visitor research;
- holding focus groups; and
- training.

You might need funding for:

- specialist help (as above);
- staff training;
- hosting consultation sessions;
- hosting networking and partnership sessions;
- producing consultation material; or
- translating consultation material into other languages and formats for specific audiences.

Sources of information and advice

Local networks – local authority culture, tourism and leisure officers.

National organisations – for example, Arts Marketing Association or Visitor Studies Group.

(See section 6 for publications and internet sources.)

top tip . . .

Allow plenty of time and energy for thinking about the issues and deciding on priorities.

Section 3 continued

Guide to creating an Audience Development Plan

Step 3: Assessing your organisation's potential for audience development and setting objectives

This stage is critical to the success of your plan and your whole Audience Development Project. Allow plenty of time and energy for reflecting on the findings of step 2 and making decisions about priorities and aims.

Your plan should contain a realistic assessment of your site, collection or item's true potential for audience development and set the direction for your audience development work.

The plan should cover:

- the potential for developing audiences;
- the overall objective for the audience development work you want to do;
- how this helps your organisation achieve its objectives;
- which audience or audiences you want to develop;
- the reasoning behind these choices;
- numerical targets for increased involvement;
- qualitative targets for audience satisfaction;
- the timetable to achieve these aims;
- performance measures for success; and
- the key stakeholders for the proposed project.

To be successful, the choices you make and the priorities you set for audience development should be included in your overall organisational development strategy.

⚠ Issues to consider

On the basis of all the evidence collected, what can your organisation realistically do to develop audiences?

What do you want to do?

Why do you want to do it? That is, what is your overall aim in carrying out audience development work?

How does the assessment fit with your current organisational or business aims?

How will the work you want to do help your organisation achieve its aims?

How does it fit with your access strategy and your conservation strategy?

Are there any disadvantages to your organisation in carrying out audience development work?

Which audience or audiences do you propose to target for development?

Are these new audiences?

Or are these existing ones that can be developed further?

What is the reasoning behind choosing these target audiences?

What is the balance between existing and new audiences?

Which are the priorities?

What is the timescale for the audience development work?

Whose commitment do you need and how will you get it?

Once you have defined the target audience or audiences you want to reach, set targets for each of them. For example, numerical targets for increased involvement. Could you aim to increase the percentage of local residents visiting your site by 5% each year from the current baseline? Or, could you aim to attract 50% of the local secondary schools to take part in your education programme in the next academic year, and 100% by the end of two years?

- Qualitative targets for audience satisfaction.
  For example, could you aim for 80% of visitors to your site to rate their visit as 'good' or 'excellent' in the first year of the project, and 81% in the second year? Could you aim for 80% of school teachers bringing groups to your site to rate the teaching sessions or resources you provide as 'highly relevant' to the National Curriculum?

  How will you measure your success in achieving these targets?

remember!

Your plan should be realistic.

Section 3 continued

Guide to creating an Audience Development Plan

Tools

SWOT analysis – this is a marketing tool for analysing the strengths, weaknesses, opportunities and threats that are affecting your organisation now or may affect you in the future. See appendix B for an explanation of how to use it.

PEST analysis – this is also a marketing tool which you could use to analyse the factors which are affecting or may affect your organisation. PEST stands for Political, Economic, Social and Technological factors. See appendix B for an explanation of how to use it.

SPELT analysis – this is a variation of a PEST analysis with extra legal factors.

Help and resources

Senior management support.

Board-level support.

Specialist help with carrying out SWOT or PEST analyses.

Agreement to forming partnerships to reach target audiences.

Information and advice

(See section 6 for publications and internet sources.)

Step 4: Action plan for each target audience

This is the crucial stage of working out:

- what you will need to do to develop your chosen audience or audiences;
- who will need to be involved;
- how long it will take; and
- what it will cost.

This part of your plan will define the scope of your Audience Development Project. It should be realistic and, with the necessary resources (such as a Heritage Grant from us), you should be able to put it into action. You also need to show the organisation's commitment to putting it into action, for example by using your own resources or applying for other funding.

For each target audience, you should cover:

- the nature of the audience;
- how you will reach them and involve them;
- what you will offer them;
- how and with whom you will deliver the services or programmes;
- the benefits to the audience;
- the timetable for the proposed work;
- how you will achieve the objectives you set in step 3;
- how you will measure success; and
- how you will maintain the work and keep the audience after the project finishes.

If you are targeting more than one audience, your plan should also show how the development work with each audience relates to the others.

remember!

The more time and effort you put into planning your project, the better it will be for everyone.

Section 3 continued

Guide to creating an Audience Development Plan

Issues to consider

What are the audience's characteristics?

What are their needs and interests?

How will you consult and involve them?

What will you offer them and how (that is, the scope of your actual Audience Development Project)?

Which aspects of your existing services or programmes can you develop for this audience?

What will be new?

Which organisations will work with you on the project?

What role will each project partner play?

What resources are needed, for example, time, skills, money and facilities?

Where will they come from?

What contribution (in cash or non-cash contribution) will each partner make?

What are the benefits to the audience of the work you are planning to do?

What training and professional development do staff in your organisation and the partners need?

How will you evaluate the project before, during and after it has been completed?

How will you keep this audience after the initial project?

How will you maintain the programmes or services that you developed and increase their audiences?

What is the timetable for the development work?

What are the risks? How will you manage them?

Who will raise the funding you need and where will it come from?

How does the action plan for one audience relate to that for others?

What is the overall timetable?

☿ Tools

SWOT, PEST and SPELT analyses (see page 14 and appendix B).

Ansoff's Matrix – a tool developed in a business context which you can use to identify the products, programmes or services you could offer to existing and new audiences (see appendix B for an explanation).

Brainstorming workshops to create and test ideas.

Piloting ideas with a section of the target audience.

⊕ Help and resources

You might need specialist help with:

- consulting the target audience;
- holding focus groups;
- training; and
- designing project evaluation.

You might need funding for:

- specialist help (as above);
- staff training;
- hosting consultation sessions;
- hosting networking and partnership sessions;
- producing consultation material; and
- translating consultation material into other languages or formats for specific audiences.

ⓘ Sources of information and advice

- Local networks, for example, local-authority culture, tourism, leisure and environment officers, teachers and advisers, local-authority lottery officers and fundraisers.
- National organisations relevant to the target audience, for example, The Group for Education in Museums, National Institute for Adults Continuing Education, University of the Third Age, Black Environment Network.

(See section 6 for publications and internet sources.)

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Section 4
How we will assess your application

Your application for a grant to create an Audience Development Plan must show both the value of the work you plan to do and your organisation's ability to manage the work to a high standard. We will also want to see evidence of your organisation's commitment to putting into action the outcomes of the research you carry out for the plan, with or without a Heritage Grant from us.

We expect your organisation to have carried out the work that is needed to allow you to start step 1 of the plan, that is, to describe your organisation's current position. For example, you should have carried out the business planning and general market research needed for your current operations, and you should have in place the necessary organisational policies (such as your equal opportunities policy or your access policy).

You cannot develop an Audience Development Plan on its own. It is important that any work you propose to develop your audiences should take account of the heritage significance and value of the heritage item you are working with. We will expect your application to show that you have balanced the need to develop audiences with the conservation management needs of your heritage item, and that this is reflected in your plan.

We will only consider applications for costs that are necessary for creating an Audience Development Plan – not the costs that are part of your normal operations.

You can ask for funding for the following.

- Specialist help
- Carrying out visitor or user research
- Analysing visitor or user data
- Advising on designing and putting your research into action
- Educational advice to relate your site or collections to school curricular training schemes
- Holding focus groups and consultation sessions
- Holding meetings with community groups
- Supply cover for teachers who take part in the consultation
- Producing material for consultation
- Translating materials into community languages
- Staff development sessions and training
- Hosting consultation sessions, for example, hiring a venue

We cannot give a grant towards existing staff costs, but we can fund short-term contracts or extensions to part-time hours for the purpose of creating your plan.

We do not give grants under this programme for:

- option appraisals;
- feasibility studies;
- market research and market analysis (that is, general research, that is not specific to your site or one audience);
- general organisational documents (for example, access, education and collection policies); or
- other business-related studies.

Before you fill in the application form, you should make sure that your answers cover the following questions.

- How will the work you propose increase people's appreciation of your heritage item, site or collection?
- How will the work encourage greater involvement in heritage activities by existing audiences and by new audiences?
- What methods and activities will you use to encourage greater involvement?
- How will the work you propose promote opportunities for people to learn about, have access to, and enjoy their heritage?
- What benefits will the work bring to the community?
- What is the significance and value of the heritage to which the work relates?
- What are the immediate or long-term benefits (or both) to the heritage to which the proposed work relates?
- What is the demand for the work that you propose?
- Who have you consulted in making your proposal?
- Who has given you advice on your proposal?
- How will you fund putting your Audience Development Plan into practice?
- Who will be involved in putting your Audience Development Plan into practice?
- How will your Audience Development Plan relate to other organisational strategies and developments?
- How often will you review and update your Audience Development Plan?
- How is your organisation committed to maintaining the benefits of your work in the future?

Although you are at an early stage of developing the larger project for which you will be making a Heritage Grant application, you must be able to tell us what the aims of that larger project will be.

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Section 5
Sources of advice and information

Contents

1 Publications and websites

2 Organisations

1 Publications and websites

1.1 Government policy and initiatives

General

Website: www.ukonline.gov.uk/
A good entry point for UK government online. This includes an A to Z listing of links to central and local government sites, plus many public organisations.

Department for Culture, Media and Sport
Website: www.culture.gov.uk

Department for Environment, Food and Rural Affairs
Website: www.defra.gov.uk/

Office of the Deputy Prime Minister (for regional and local government, regeneration, the Social Exclusion Unit and neighbourhood renewal)
Website: www.odpm.gov.uk

Website: www.nics.gov.uk
For the arts and cultural strategy, see www.dcalni.gov.uk

Website: www.scotland.gov.uk
For the Scottish cultural strategy, see www.scotland.gov.uk/nationalculturalstrategy/docs/cult-00.asp

Website: www.wales.gov.uk/
For the Welsh cultural strategy, see www.wales.gov.uk/subiculture/content/creative/creative_home-e.htm

Education

National Curriculum in England: www.nc.uk.net/home.html

Curriculum in Northern Ireland: www.ccea.org.uk

Curriculum in Scotland: www.ltscotland.com

Curriculum in Wales: www.accac.org.uk

National Grid for Learning (NGfL) 'The gateway to educational resources on the Internet. It provides a network of selected links to websites that offer high-quality content and information.'
Website: www.ngfl.gov.uk

If you are not sure which government office covers your location, look at the list at www.odpm.gov.uk/go/index.htm

East of England: www.go-east.gov.uk
East Midlands: www.go-em.gov.uk
London: www.open.gov.uk/glondon
North East: www.go-ne.gov.uk
North West: www.go-nw.gov.uk
South East: www.go-se.gov.uk
South West: www.gosw.gov.uk
West Midlands: www.go-wm.gov.uk
Yorkshire and The Humber: www.goyh.gov.uk

Social inclusion

You can download summaries of all Social Exclusion Unit reports from www.socialexclusionunit.gov.uk

Arts and sport: Policy Action Team 10: a report to the Social Exclusion Unit
Department for Culture, Media and Sport, 1999
One of a number of reports from the Government's Social Exclusion task force.

Libraries, museums, galleries and archives for all
Department for Culture, Media and Sport (DCMS), 2001
Sets out DCMS's policy framework and guidance for these sectors on working to tackle social exclusion.

People and places: social inclusion policy for the built and historic environment
Department for Culture, Media and Sport, 2002
Consultation document on DCMS's draft policy for the built and historic environment.

1.2 Developing audiences

Arts Ambassadors Unit: final report
Arts About Manchester, 2001
Case studies of the arts ambassadors scheme in Manchester which aimed to increase the number of people from black, Asian and other minority communities going to arts events.

Arts for all: encouraging learning through arts and culture
National Institute of Adult and Continuing Education (NIACE), 2002
Case studies and good-practice principles for adult learning in arts and heritage sectors.

Section 5 continued
Sources of advice and information

The Arts and older people: a practical introduction
By Fi Frances, Age Concern England, 1999

Audience development: collaborations between education and marketing
By Rick Rogers for the Arts Council, 1998
You can download this from the Arts Council website at www.artscouncil.org.uk
Provides useful insights into how to build successful collaborations, with case studies.

Building bridges: guidance for museums and galleries on developing new audiences
By Jocelyn Dodd and Richard Sandell
Museums and Galleries Commission, 1998
This is useful to other heritage and arts sectors.

A Common wealth: museums in the learning age
By David Anderson
Department of Culture, Media and Sport, 1997 [updated in 1999]
A key publication examining all aspects of learning in museums and galleries. It includes case studies that can apply to other heritage sectors.
You can download it from www.culture.gov.uk/heritage/commonwealth.html

Crossing the line: extending young people's access to cultural venues
Edited by John Harland and Kay Kinder, Calouste Gulbenkian Foundation, London, 1999
A useful review of the literature, audit of recent initiatives, and research into young people's experiences of cultural venues.

Developing museum exhibitions for lifelong learning
Edited by Gail Durbin, The Stationery Office, 1996
A collection of important texts on developing exhibitions, including issues related to representing disabled people and ethnic-minority communities.
This is useful for anyone responsible for interpreting and presenting information.

Developing new audiences for the heritage: a research study
Heritage Lottery Fund, 2001
Presents the results of consultation and workshops in the heritage sectors. Reviews all the significant published research into audiences for the heritage, plus 17 case studies of successful audience-development projects and good-practice principles.
You can download it as a pdf file from www.hlf.org.uk

Ethnic environmental participation: key articles and papers
By Judy Ling Wong, Black Environment Network.
Volumes 1-3
You can download it from www.ben-network.org.uk

Family Friendly final report
By Kim Haygarth and others, Arts About Manchester, 2001
A report of a project to identify how to meet the needs of family audiences. It includes reports on action research in arts venues.

A guide to audience development
By Heather Maitland, Arts Council of England, 2000
A practical guide to the issues of choosing audiences, getting them involved, creating events and projects, evaluation and maintaining relationships. It also includes useful case studies. It focuses on arts activities but can also apply to heritage activity.

Heritage for all: access to the cultural heritage by culturally diverse minorities in Yorkshire
Produced by Hayton Associates for English Heritage, Heritage Lottery Fund, Yorkshire Museums Council and Kirklees Community History Service, 2001
Includes the findings of a small-scale research project looking at Black and Asian audiences in Yorkshire.
Available from our Regional Office for Yorkshire and the Humber at:
Carlton Tower
34 St Paul's Street
Leeds LS1 2QB.
Phone: 0113 388 8030

Including museums: perspectives on museums, galleries and social inclusion
Edited by Jocelyn Dodd and Richard Sandell, Research Centre for Museums and Galleries, University of Leicester, 2001
Although written for museums and galleries, this publication presents powerful arguments for all cultural organisations to consider the possible effect of their activities (including programmes, collections, events and marketing) in relation to the discrimination and disadvantage experienced by a range of different minorities. Specific examples relate to sexuality, disability and ethnicity.

Learning through culture: The DfES Museums and Galleries Education Programme: a guide to good practice
By Amanda Clarke and others, Department for Education and Skills, 2002
This is free and available from the Research Centre for Museums and Galleries, University of Leicester (e-mail: rcmg@le.ac.uk).
Lessons apply beyond just museums and galleries. It contains case studies on working with children with special educational needs and children from ethnic-minority backgrounds, and a useful and practical guide to project planning, delivery and evaluation.

Section 5 continued
Sources of advice and information

**Museum Learning Initiative
(South West Museums Council)**
Website: www.swmlac.org.uk/mli/muslin.htm
A very useful website packed with helpful introductions to topics (for example, learning in museums and writing an education policy), toolkits (for example, SWOT analyses, thinking about audiences, evaluation) and web links.

Museum practice
A three-monthly publication available on subscription from the Museums Association. It includes practical advice, guidance and case studies, often with wider relevance than just museums.

Useful issues
Issue 10 (Volume 4, number 1, pages 46 to 59) 1999
'Museums and education', Part 1: an introduction to learning in museums, the role of educators, writing a museum policy
Issue 11 (Volume 4, number 2, pages 48 to 67) 1999
'Museums and education', Part 2: provision for schools
Issue 12 (Volume 4, number 3, pages 40 to 57) 1999
'Museums and education', Part 3: families, pre-school children and adults
Issue 17 (Volume 6, number 2, pages 36 to 49) 2001
'Opening minds to access'- practical guidance on how to make museums more accessible to people with learning difficulties, including case studies.
Issue 17 (Volume 6, number 2, pages 50 to 78) 2001
Update: Cultural diversity – project summaries, resources, contacts, case studies.
Issue 13 (Volume 5, number 1, pages 48 to 81) 2000
Update: Interpretation – guidance on producing an interpretation strategy and case studies, including museum-theatre and audio guides.
Issue 11 (Volume 4, number 2, pages 68 to 97) 1999
Update: Outreach – introduction to outreach, case studies including social inclusion projects, resources and contacts.
Issue 15 (Volume 5, number 3, pages 44 to 69) 2000
Update: Visitor services – guidance and case studies on the broad theme of improving the visitor's experience, including resources and contacts, and writing an access policy.

Museums and social inclusion: the GLLAM Report
Group for Large Local Authority Museums, 2000
An introduction to the ways museums can work with social agencies to reduce social exclusion. It includes case studies plus principles of good practice.

Museums and young people
By Suzanne Rider and Shona Illingworth, Museums Association, 1997
Case studies and guidelines, including marketing, evaluation and partnerships.

Plants and human well-being
Edited by Jane Stoneham and Tony Kendle, The Sensory Trust, 1998
The proceedings of a conference in 1996, including papers on projects with young people, ethnic-minority communities and people with disabilities.

Small museums and social inclusion: a summary of key findings
Research Centre for Museums and Galleries, University of Leicester, 2001
The staff at 16 small museums were interviewed between 2000 and 2001. This report identifies both factors which promote social inclusion and those which prevent it.
This is available from Resource at www.resource.gov.uk

Taking part: an audit of social inclusion work in archives
The National Council on Archives, 2001
This is a useful snapshot of current work that highlights the important role archives have to play in social inclusion and in creating respect for different cultures. This includes a best-practice framework.

Testing the water: young people and galleries
Edited by Naomi Horlock, Liverpool University Press and Tate Gallery Liverpool, 2000
Reflections and case studies on the relationships between young people and galleries, based on Tate Gallery Liverpool's work with young people.

Walking ten feet tall: a toolkit for family learning practitioners
By Jeanne Haggart, NIACE, 2001
This offers very detailed practical guidance on how to plan, deliver and evaluate family learning programmes. It contains case studies, including one based in a museum and one at a football club.

Working with excluded groups: guidelines on good practice for providers and policymakers in working with groups under-represented in adult learning
By Veronica McGivney, NIACE, 2001
Focuses on creating educational opportunities for adults, and is useful for the potential for partnerships for heritage organisations.

www.volunteering.org.uk/index.htm
An 'online resource for volunteer managers, potential volunteers and anyone who wants up-to-date information on volunteering' run by the National Centre for Volunteering.

Section 5 continued
Sources of advice and information

Disability directory for museums and galleries
Resource, 2001
Written with the involvement of several disabled consultants, it offers advice for the museum and gallery sector but is also relevant across the cultural sector for the approach and philosophy that should underline practice.
It covers the main principles that must underline good practice, how to deliver good practice (including check lists) and sources of more advice and information. It confirms the importance of real partnership working with disabled people themselves and the necessity of change in organisational culture led from the most senior levels of management.
You can buy it in a loose-leaf format or download it free from the Resource's website at www.resource.gov.uk

A good-practice guide to disabled people's access in the countryside
The Fieldfare Trust for BT Countryside for All
You can download this from
www.fieldfare.org.uk/fieldfare/bt/menu.html
It offers a best-practice approach and includes guidelines for a range of techniques to improve access to the whole experience of visiting the countryside. The principles that this guidance is based on can be applied to most heritage venues and highlight the importance of networking with disabled people, providing appropriate information, transport, interpretation and events management. It includes information sheets on physical features such as paths, gradients, surfaces, handrails, gates, picnic tables, signs, toilets, accessible publicity and much more.

Making connections: a guide to accessible greenspace
By Richard Price and Jane Stoneham, The Sensory Trust, 2001
Good-practice guidelines and case studies of the ways of opening up natural heritage to a wide range of audiences.

Social exclusion in countryside leisure in the United Kingdom: the role of the countryside in addressing social exclusion: a report for the Countryside Recreation Network
By Bill Slee and Derren Jones, Countryside Recreation Network, 2001
Useful literature review and case studies.

Artists and teachers: a handbook for collaborative arts projects in schools
By Kirsty Smart, Sheffield Hallam University, 2001
Useful practical guidance on running arts projects in schools, much of which can be applied to other kinds of projects.

Guidance notes on carrying out audience/visitor surveys
Produced by the Arts Council, 1999
Useful tips on how to carry out a survey.
You can download this from the Arts Council website at www.artscouncil.org.uk

Guidelines for marketing to disabled audiences
By Annie Delin and Elspeth Morrison, Arts Council of England, 1993 (revised edition 1995)
Practical advice and guidance – an updated edition is due for publication in late 2002.

A journey of discovery: children's creative participation in planning
By Judy Miller, Save the Children, 1999
Describes the process of involving children in planning for a Children's Discovery Centre in East London.
Useful general principles for consulting children.

The marketing manual for performing arts organisations
By Heather Maitland, Arts Marketing Association, 2000
A comprehensive (300 pages plus) practical guide to all aspects of marketing, from audience development, pricing and evaluation to the detail of running an advertising campaign, buying print and setting up a website. It includes guidance on creating a marketing plan for lottery applications.
It is an extremely useful practical tool for any heritage organisation.

Marketing the museum
By Fiona McLean, Routledge, 1997
A comprehensive look at all aspects of marketing. Focused on museums but examples can be developed for other sectors.

The marketing and public relations handbook for museums, galleries and visitor attractions
By Sue Runyard and Ylva French, The Stationery Office, 1999
A comprehensive guide to public relations and marketing as a way of developing and maintaining audiences, generating income and promoting the role of heritage activity.

Sources of advice and information

Prove it! A practical guide to market research for museums, galleries and visitor attractions
By Anne Millman, commissioned by Bedfordshire Museums, Hertfordshire Museums and South Eastern Museums Service, 2001.
A very useful practical guide that can apply to other sectors.
It includes model forms and check lists for surveys and interviews, and sections on analysis and evaluation.
You can download it from
www.museums.bedfordshire.gov.uk/proveit

Sample visitor survey questions
Produced by the Arts Council, 1999
You can download it from the Arts Council website at
www.artscouncil.org.uk
Questions are written to be used in a gallery or exhibition, but could easily be adapted for other 'visitor attractions'.

Sharing the experience: how to set up and run arts projects linking younger and older people
By Susan Langford and Sue Mayo, Magic Me, 2001
A practical handbook on projects involving different generations based on the collective experience of Magic Me, a community arts company.
Contact Info@magicme.demon.co.uk

Techniques for talking: participatory techniques for land-use planning
By Mark Toogood, RSPB, 2000
Case studies and guidance for the use of focus groups, brainstorming, citizens' panels and other types of community involvement. This is relevant beyond land-use planning.

Culture and learning: creating arts and heritage education projects
A guide to developing and managing education projects with practical advice and examples of successful projects.
Arts Council and Heritage Lottery Fund, 2002

Did it make a difference?: Evaluating community-based arts and business partnerships
By François Matarasso, Arts and Business, 2000
A practical guide to evaluating community-based projects. It applies as much to heritage as the arts, and includes a very useful evaluation checklist.

Evaluating community arts and community well being: an evaluation guide for community arts practitioners
Arts Victoria, Melbourne, 2001
Practical tools for evaluation, for example, surveys, check-lists.
It applies beyond arts projects.
Can be downloaded from www.arts.vic.gov.au

Prove It!: Measuring the effect of neighbourhood renewal on local people
Groundwork UK, 2001
A useful practical guide, including performance measures.

Sources of advice and information

Organisations

Arts and Business
'A not-for-profit organisation that helps its members in both business and the arts to develop more effective ways of working together. Our vision is to help build communities by developing creative partnerships between business and the arts.'
Nutmeg House
60 Gainsford Street
London SE1 2NY
Phone: 020 7378 8143
Fax: 020 7407 7527
E-mail: head.office@AandB.org.uk
Website: www.aandb.org.uk

Arts Council of England
In April 2002, the Arts Council of England and the English Regional Arts Boards joined together to form a single development organisation for the arts in England.
14 Great Peter Street
London SW1P 3NQ
Phone: 020 7333 0100
Fax: 020 7973 6590
Textphone: 020 7973 6564
E-mail:
enquiries@artscouncil.org.uk
Website: www.artscouncil.org.uk

Arts Council of Northern Ireland
MacNeice House
77 Malone Road
Belfast BT9 6AQ
Phone: 028 90 385200
Fax: 028 90 661715
E-mail:
publicaffairs@artscouncil-ni.org
Website: www.artscouncil-ni.org

Arts Council of Wales/Cyngor
Celfyddydau Cymru
Museum Place
Cardiff CF1 3NX
Phone: 029 20 376500
Fax: 029 20 221447
Minicom: 029 20 390027
Website: www.celfcymru.org.uk

Arts about Manchester
Churchgate House
56 Oxford Street
Manchester M1 6EU
Phone: 0161 238 4500
E-mail: Intray@aam.org.uk
Website: www.aam.org.uk

Arts Marketing Association
A membership organisation which exists 'to support professional development, underpin vocation, enhance the status of pride in professional activities, whilst bringing about an even more effective coming together between people and the arts.'
7a Clifton Court
Clifton Road
Cambridge CB1 7BN
Phone: 01223 578078
Fax: 01223 245862
E-mail: info@a-m-a.co.uk
Website: www.a-m-a.co.uk

Black Environment Network (BEN)
'Working across diverse sectors for ethnic environmental participation.'
BEN UK Office
1st Floor
60 High Street
Llanberis
Wales LL55 4EU
Phone: 01286 870715
Website:
www.ben-network.org.uk

Campaign for Learning through Museums and Galleries (CLMG)
Set up by museum and gallery organisations, it offers advice and training, and manages projects.
The Old Ship
Fore Street
Stratton
Cornwall EX23 9DA
Phone: 01288 354536
Fax: 01288 359263
E-mail: nicola.nuttall@clmg.org.uk
Website: www.clmg.org.uk

Council for the Curriculum, Examinations and Assessment (CCEA)
CCEA is the Northern Ireland Council for the Curriculum, Examinations and Assessment.
Clarendon Dock
29 Clarendon Road
Belfast BT1 3BG
Phone: 028 9026 1200
Fax: 028 9026 1234
E-mail: info@ccea.org.uk
Website: www.ccea.org.uk

Countryside Agency
John Dower House
Crescent Place
Cheltenham
Gloucester GL50 3RA
Phone: 01242 521381
Fax: 01242 584270
E-mail: info@countryside.gov.uk
Website: www.countryside.gov.uk/index.htm

Countryside Recreation Network
Provides information on countryside and related recreation matters, holds events, and publishes reports on access and social inclusion.
Liz Davies
Network Manager
Department of City and Regional Planning
University of Wales
Cardiff
Glamorgan Building
King Edward VII Avenue
Cardiff CF10 3WA
Phone: 029 20 874970
Fax: 029 20 874728
E-mail: crn@cf.ac.uk
Website: www.countrysiderecreation.org.uk

Engage
The international membership organisation for educators, artists, curators and teachers. It promotes understanding and enjoyment of the visual arts by gallery education and mediation programmes.
1 Herbal Hill
London EC1R 5EF
Phone: 020 7278 8382
E-mail: info@engage.org
For Scotland, contact
E-mail: scotland@engage.org
For Wales, contact
E-mail: wales@engage.org
Website: www.engage.org.

English Heritage
National Office
23 Saville Row
London W1S 2ET
Phone: 020 7973 3442
Fax: 020 7973 3443
E-mail: Customer Services@english-heritage.org.uk
Website: www.english-heritage.org.uk

Fieldfare Trust
A charity mainly concerned with promoting access to, and enjoyment of, the countryside for disabled people.
67a The Wicker
Sheffield S3 8HT
Phone: 0114 270 1668
Minicom: 0114 275 5380
E-mail: fieldfare@btinternet.com
Website: www.fieldfare.org.uk

Section 5 continued
Sources of advice and information

Group for Education in Museums (GEM)
GEM Support Office
Primrose House
193 Gillingham Road
Gillingham
Kent ME7 4EP
Phone/fax: 01634 312409
E-mail: gemso@blueyonder.co.uk
Website: www.gem.org.uk

Groundwork UK
An environmental regeneration charity 'making sustainable development a reality in many of the UK's most disadvantaged communities'.
85-87 Cornwall Street
Birmingham B3 3BY
Phone: 0121 236 8565
E-mail info@groundwork.org.uk
Website: www.groundwork.org.uk

Historic Scotland
Longmore House
Salisbury Place
Edinburgh EH9 1SH
Phone: 0131 668 8600
Fax: 0131 668 8669
E-mail:
Hs.website@scotland.gsi.gov.uk
Website:
www.historic-Scotland.gov.uk/

Institute of Leisure and Amenity Management
Courses and seminars cover topics that are relevant to heritage organisations, for example, 'Organising Successful Community Events' and 'Developing the 50+ Market'.
ILAM House
Lower Basildon
Reading RG8 9NE
Phone: 01491 874800
Fax: 01491 874801
E-mail: info@ilam.co.uk
Website:
www.ilam.co.uk/index.htm

Learning and Teaching Scotland
The national public organisation, sponsored by the Scottish Executive Education Department, that is responsible for providing advice, support, resources and staff development that improve the quality of educational experiences.
Learning and Teaching Scotland
74 Victoria Crescent Road
Glasgow G12 9JN
Phone: 0141 337 5000
Fax: 0141 337 5050
E-mail:
enquiries@LTScotland.com
Website: www.ltscotland.com

Museums Association
24 Calvin Street
London E1 6NW
Phone: 020 7426 6920
Website:
www.museumsassociation.org

National Centre for Volunteering
Regents Wharf
8 All Saints Street
London N1 9RL
Phone: 020 7520 8900
Fax: 020 7520 8910
E-mail:
Volunteering@thecentre.org.uk
Website: www.volunteering.org.uk

National Youth Agency
Aims to develop youth work to promote young people's personal and social development, and their voice, influence and place in society. Provides information on a wide range of issues affecting young people.
17-23 Albion Street
Leicester LE1 6GD
Phone: 0116 285 3700
(minicom available)
Fax: 0116 285 3777
E-mail nya@nya.org.uk
Website: www.nya.org.uk/

The Network: tackling social exclusion in libraries, museums, archives and galleries
Publishes a very useful e-mail newsletter.
John Vincent
Wisteria Cottage
Nadderwater
Exeter EX4 2JQ
Phone/fax: 01392 256045
E-mail:
John@nadder.freeserve.co.uk

NIACE (The National Institute of Adult Continuing Education)
21 De Montfort Street
Leicester LE1 7GE
Phone: 0116 204 4200
E-mail: enquiries@niace.org.uk
Website: www.niace.org.uk

NIACE Dysgu Cymru
Ground Floor
35 Cathedral Road
Cardiff CF11 9HB
E-mail and website as above.

Qualifications and Curriculum Authority (England)
Maintains and develops the school curriculum and associated assessments, and accredits and monitors qualifications in schools, colleges and at work in England.
83 Piccadilly
London W1J 8QA
Phone: 020 7509 5555
Fax: 020 7509 6666
Minicom: 020 7509 6546
Website: www.qca.org.uk

Qualifications Curriculum and Assessment Authority for Wales
The National Assembly for Wales's main advisory body on all aspects of the school curriculum, examinations, assessment and vocational qualifications.
Castle Buildings
Womanby Street
Cardiff CF10 1SX
Phone: 029 2037 5400
Fax: 029 2034 3612
E-mail: info@accac.org.uk
Website: www.accac.org.uk

Resource: The Council for Museums, Archives and Libraries
16 Queen Anne's Gate
London SW1H 9AA
Phone: 020 7273 1444
Fax: 020 7273 1404
E-mail: info@resource.gov.uk
Website: www.resource.gov.uk

Sensory Trust
'Our main aim is to help improve the design and management of greenspace so that it is both accessible and attractive to people of all ages and abilities.' Information on accessible and therapeutic design, sources of help, examples of good practice, conferences, training and publications.
Watering Lane Nursery
Pentewan
Cornwall PL26 6BE
Phone: 01726 222900
Fax: 01726 222901
E-mail:
Sensory@sensorytrust.swinternet.co.uk
Website: www.sensorytrust.org.uk

Section 5 continued
Sources of advice and information

Scottish Arts Council
12 Manor Place
Edinburgh EH3 7DD
Help desk: 0845 603 6000
Phone: 0131 226 6051
Fax: 0131 225 9833
Type Talk: If you are hard of hearing, type 18001 before the number.
E-mail:
help.desk@scottisharts.org.uk
Website: www.sac.org.uk

University of the Third Age (U3A)
There are U3A groups around the United Kingdom which encourage lifelong learning for people who are no longer in full-time employment.
26 Harrison Street
London WC1H 8JG
Phone: 020 7837 8838
Fax: 020 7837 8845
E-mail: enquiries@u3a.org.uk
Website: www.u3a.org.uk

Visitor Studies Group
A network which 'exists to help museums and galleries to connect with their visitors and create a positive visitor experience'.
E-mail: editor@visitors.org.uk
Website: www.visitors.org.uk

appendices . . .

Appendix A

1 Framework for understanding your current audiences and the barriers that prevent people from taking part in heritage activities

Audience   **Types of barrier**

	Organisational	Physical	Sensory	Intellectual	Cultural	Financial
People who work full time						
People who work part time						
Unemployed people						
People who are retired						
People with low incomes						
People with cars						
People using public transport						
People who live in towns and cities						
People who live in the country						
Women						
Men						
Families with babies or small children						
Pre-school children						
School-age children						
Young adults						
Older people						
People with physical-health problems						
People with mental-health problems						
People with visual impairments						
People with hearing impairments						

Audience	Types of barrier					
	Organisational	Physical	Sensory	Intellectual	Cultural	Financial
People with mobility impairments						
People with learning difficulties						
People from different communities						
People whose first language is not English						
Refugees						
School students						
School teachers						
Further education students						
Higher education students						
Adult learners						
People with a wide range of educational experience						
People lacking basic skills						
Local residents						
People who work locally						
Day trippers						
Tourists from within the UK						
Tourists from abroad						
People with access to the internet						
People without access to the internet						

Appendix A continued

2 Framework for identifying the barriers that prevent people becoming involved with heritage

Organisational barriers

- What image does your organisation have?
- How do people find out what you can offer to meet their needs and interests?
- What image does your publicity material give?
- Do people find your opening times convenient?
- How welcome do people feel at your site?
- To what extent does the profile of your staff, volunteers and governors reflect the make-up of the population?
- What opportunities are there for people to get involved, for example, as a volunteer or governor?
- How do you handle positive and negative feedback from visitors, volunteers or other people?
- Does your organisational structure meet the aims and priorities of the organisation?

Physical barriers

- How easy is it for people to travel to and from your site at the times of day and year you are open?
- How easily can people get around your building, displays or other facilities?
- What facilities or services would make it easier for people?
- How comfortable is the environment at your site?
- Are there limits on access to your heritage item because of its significance and value?

Sensory barriers

- How easily can people see, hear and read the information you provide?
- What facilities or services would make it easier for people?
- How many of their senses are your visitors using?
- What is there for people to touch?

Intellectual barriers

How easy is it for people of different ages, abilities and backgrounds to understand the information you provide?

What might be making it hard for people?

Who do you involve in gathering and writing the information?

How do you help people to develop their interests in heritage?

How do you use technology to improve people's experience?

What skills do people need to use your technology?

Cultural barriers

To what extent does your heritage item reflect the interests and life experiences of people from a range of cultures?

Who do you consult when you want to develop new facilities or services?

How do you take account of different views?

How do people know that their point of view is valued?

Financial barriers

Do your services, facilities and activities offer value for money?

To what extent do your admission prices put people off?

How do you help people so they can afford to become involved?

Appendix B
Useful tools

SWOT analysis

SWOT stands for Strengths, Weaknesses, Opportunities and Threats. Strengths and weaknesses are internal factors. For example, a strength could be your rising visitor numbers or your specialist expertise in working with schools. A weakness could be the lack of commitment to audience development by one key group such as volunteers or a decline in sponsorship. Opportunities and threats are external factors. For example, an opportunity could be the possibility of funding from your regional cultural consortium. A threat could be a new shopping centre next to your site or new legal requirements.

A SWOT analysis is most useful when it is created by a group of people with different views and worked through in detail. Use this table to record all the relevant factors, recognising that something you see as a threat may also potentially be viewed as an opportunity.

Strengths	Weaknesses
Opportunities	**Threats**

Once you have worked through the SWOT analysis, you can use it to assess the potential for audience development and to work out priorities and aims.

PEST analysis

PEST stands for Political, Economic, Social and Technological, that is, the types of external forces which are affecting, or may in the future affect, your organisation. This tool is useful for analysing the wider environment in which you operate.

You should consider the following factors for your organisation:

Political

What is the political environment for your heritage activity?

Is it likely to change and, if so, how may this affect your organisation?

How would you be affected if there were a change of local, regional, country or central government?

Economic

What is the state of the national or local economy?

Are there any plans for new business developments locally?

Social

Is the local population changing and, if so, how?

Are people's attitudes to work and leisure changing?

Do people have strong views on green issues and, if so, how does that affect heritage activity?

Technological

How is your activity changed by developments in technology?

Does technology offer your audiences new products and services?

SPELT analysis

This tool is basically the same as a PEST analysis but adds another factor – the legal forces.

Legal

Is there any new legislation that will affect your organisation and the services it offers?

Appendix B continued

Ansoff's Matrix

This is a tool from business marketing which you may find useful to help you think about what to offer to different audiences.

For example, you may currently offer programmes for families which are quite successful, but you want to attract more families. How could you do this? Or, you may have chosen a new audience to target for development work and discover that you have existing products which could be adapted for that audience with only a small amount of extra resource.

The following terms are used in the table below.

Market penetration – this is increasing use by reaching more of your existing audience.

Product development – this is improving the 'products' (for example, programmes and services) on offer in order to increase existing audiences.

Market extension – this is taking the products you have to new audiences.

Diversification – this combines product development and market extension, and means changing what you offer to reach new audiences.

Existing	**Market penetration**	**Product development**
Markets	**Market extension**	**Diversification**
New		
	Existing **Products** **New**	

You can use the table to work out the strategies for achieving your aims for each target audience (for example, you can do this by marking on the table which products you have for which markets or which products you could offer to new markets).

C

Appendix C

Tips for successful planning

A good Audience Development Plan can help you do your job more effectively and will benefit your heritage organisation in the longer term. It should mean that:

- you understand the audiences for your heritage item better;
- the people who you need to work closely with are sympathetic to the issues you face; and
- you have a positive framework for making decisions.

It is important to manage the process of developing your plan, especially if you are commissioning (ordering) work from external specialists. The following ideas may help.

- Do it for the right reasons

Use the process as a positive management tool. If the plan is seen as no more than a hoop to jump through for the Heritage Lottery Fund, then you will not get the most benefit from doing the plan. This will be apparent from the written document, and you will have spent time or money on something which is of little long-term benefit to your organisation.

- Involve people

Use the process to bring together the people who will be essential to the success of your project. Make sure that the document includes a wide range of views. There may be delays and extra costs if the right people are not involved early enough.

- Manage the process

Be prepared to take an active role in managing the planning process. Make sure that the plan helps you understand your audiences. Manage the process, from the first discussion of the idea through the stages of research, consultation and decision-making. Do your best within the organisation to make sure that the plan is put into practice.

- Mediate

There are bound to be differences of opinion and conflicting interests, some of which can arise from advice from different professionals. Use the plan to mediate and reach agreement with key people.

Appendix C continued

■ Reject poor drafts

The plan exists for you and your colleagues to read and use. It will be useless if it is poorly presented, difficult to read, badly organised or inaccurate. Work closely with any specialists you employ and be self-critical of your own work so that the document meets your needs and those of the organisation.

■ Present your information appropriately

Who is the audience for your plan? Who will use it when the Audience Development Project gets underway? Think carefully about the best way to put forward the findings of your research and consultation, and how to persuade people to give commitment to your action plan. Present information in a way that people find useful, for example in summaries, charts and graphs. Put the full findings of research and consultation in appendices.

Heritage Lottery Fund