CONNECTING**HISTORIES**
Guide

How to Plan a Heritage Project

Heritage projects are very different from other types of projects because of their specialist nature. If you're thinking seriously about doing a heritage project then there are some things you can do to ensure that you're on the right track with planning and developing your idea.

While all heritage projects have individual and distinct elements, there is a general body of 'good practice', or ways of doing and thinking about things, that will give your idea every chance of succeeding - from acquiring funding to the actual delivery of the project itself.

Below are a few areas that require some thought as you develop and build up your idea.

1. **Project outline**
2. **Partners**
3. **Volunteers**
4. **Outputs**
5. **Outcomes**
6. **Budget**
7. **Staff/team**
8. **Timeframe**
9. **Training needs**
10. **Steering group/advisory panel/management committee**
11. **Accessibility**
12. **Sustainability**

Project Outline

It is useful to develop a project outline - a short document that describes the basic idea and outcomes of the project and how you expect to deliver it. This document can be very useful to get the support of partners, communities and groups, volunteers, funding organisations and other relevant or interested parties.

The project outline does not need to be long - anything between 1 to 4 pages depending on the size and complexity of your project is fine - people are much less likely to read a long document!

Producing it will enable you to talk about your project clearly and with confidence. This will help secure support for your project; it will demonstrate to funders and potential partners that you have thought seriously about your project idea and that it is worthwhile for them to get involved and offer their time and support.

The project outline will probably address many of the following issues and activities.

Partners

Partners are vital to the success of a project and come in a variety of forms, shapes and sizes. They can potentially include community groups and the voluntary sector, funding organisations, local authorities, heritage sector organisations (such as archives, libraries and museums), schools and academic institutions, professional networks, and many others. Partners will enable you to not only develop your project, but will help you develop the confidence to deliver a project.

Partnerships are established so that your project can utilise knowledge, skills and resources that you may not have, but that you can draw on from elsewhere. Partnerships increase the likelihood of your project being completed successfully and on time. When thinking about establishing partnerships it is important to think about who you need to approach and why - be strategic.

When thinking of possible partners consider the following questions:

- which aspects of the project do you need support?

- what are the key skills and insights you lack?

- what additional resources might you need?

- what is the best way of doing things and who can tell you about any standards that you need to meet?

- Who else might be interested in doing the same sort of work?

Also try not to forget your partner's needs and aspirations - what do they need to achieve from being part of your project?

Volunteers

Volunteers are an excellent way of getting additional support for a project. Provided they have adequate training and management support, volunteers can undertake a variety of tasks and help in the successful delivery of the project. Having volunteers also provides the opportunity for outcomes such as the transfer of skills, experience and confidence and can help with sustaining aspects of the project. Again, remember that volunteers need to benefit – either through developing useful new skills or getting useful experience that will help them access training or jobs.

Some funding organisations insist on the engagement of volunteers as this is seen as an important way of involving communities, particularly, if the funding is public money (e.g. HLF) and therefore there is a need to ensure that the wider public benefits from the project's activities.

Outputs

What are your outputs? What do we mean by outputs?

All projects have what are called outputs. Outputs are the things that your project has set out to produce. For heritage projects, outputs can include exhibitions, collections of archives, publications, oral history recordings, video or film, a website, events, volunteer programmes etc.

Outputs are important as they are the products of your project and are what you leave behind as its legacy. So when thinking about and planning your project you need to give a lot of thought to what the project will produce.

Importantly, outputs have to be conceived within the context of the budget and timeframe of the project. This ensures an understanding of what is realistically achievable and improves likelihood of securing funding and, ultimately, leads to the successful delivery of the project.

Outcomes

Outcomes are different to outputs. Whereas the term 'output' refers to the actual things your project may produce or deliver, outcomes are benefits your project might bring about. Having an understanding of this will enable you to put together a strong project idea and application.

Outcomes might include an increase in or the transfer of skills and experience, an increase in knowledge and confidence, an increase in the numbers of people using a service or increased interest in heritage. Outcomes may be measured qualitatively (e.g. impact on attitudes and feelings) or quantitatively (e.g. how many people using a service).

Budget

How much is your project going to cost? This very much depends on what you plan to do in your project. The available budget for the project also depends on which funding organisation you are applying to and their funding remit and criteria.

A project generally will require someone to manage and deliver project activities, either paid staff or voluntary time. Larger projects may also have other staff - administrative or a technical or specialist member of the team needed to help with the delivery of the project such as oral history or a website. A significant proportion of the project's funding may be used for salaries, so it is useful to carefully consider what capacity and skills you need and the cost implications of staffing for the project (see below for more details).

Project outputs will also take up a significant proportion of the funding. It is crucial to get a working idea of what these will cost. Getting quotes from designers, publishers, writers, freelance staff or consultants is always important and will demonstrate to funding organisations that you have properly thought your idea through.

If your project intends to employ people on contracts to deliver aspects of the project, for example to design an exhibition or write a publication etc. it is a good idea to get

more than one quote - this is particularly important if the contract is likely to be for a significant amount. Some funding organisations may have a threshold below which it is not necessary to get more than one quote, but above which it is essential (e.g. the Heritage Lottery Fund requires at least three quotes for contracts or jobs that will cost more than £5,000 and that are not intended to be delivered by the project's core staff).

You also need to think about the resources your project will require such as office overheads, equipment, ICT and other media.

Staff/Team

Your project will need a team to help deliver it. Funding organisations will require you to demonstrate that you have considered this in full. Indeed, some funding organisations will insist that your project establishes a post specifically tasked to manage/coordinate your activities.

Your project team (even if the team consists of a single individual directly employed by the project) will be employed to enable the delivery of tasks set out in the accepted project proposal. For example, a large 'Your Heritage' HLF project (grants of up to £50,000) will probably require a project manager/coordinator. This individual may be employed full-time or part-time and this will also have an impact on the length of the project and its budget as a full-time post will cost more than a part-time post over a specified period.

Think about any additional posts that your project may require (e.g. admin staff) but remember that you also need to leave a sufficient budget for the outputs you propose. It is important to discuss these issues with the funding organisation so that you are on the right track.

Timeframe

All projects have a specified time-scale. In other words, how long is your project going last? This has implications on cost and resources. Within that overall time-frame there may be a number of stages and deadlines - what might these be? When developing your project you will need to think about these.

Careful planning of these issues demonstrates to funding organisations and other partners that you have thought your project through. As projects do unravel organically and can change you will probably need to think about a contingency, in the event the project is unable meet some of those targets and deadlines – in other words, a back-up plan.

Training needs

The specialist nature of heritage projects might mean that there is a specific skills shortage. Specialist areas may include archives-related activities such as cataloguing and listing, conservation and packing/repacking; interviewing skills for oral history; publications; interpreting and designing exhibitions; websites; delivery of training; workshops and programmes.

It is important to develop your project with this in mind. What are the key areas in which your project may require support? What are project's training needs? Who may be able to offer the relevant support?

Your initial project outline can explore this - your final application should demonstrate that you have addressed this.

Steering Group/Advisory Panel/Management Committee

Your project will need to establish a working group designed to steer or advise the project. Such a group may be called a management committee, steering group, advisory panel etc. Importantly, this group should function to assist the project (though the specific remit and scope of its activities, influence and authority will need to specified in advance).

This group should bring together people who will provide the skills, experience, knowledge, and networking necessary to make the project a success. This group will meet at set intervals as appropriate for your project e.g. once every two months.

Accessibility

Your project will need to consider access issues - how will the public get to hear about your project and its outputs? How will you make your project outputs accessible to the wider public? Where will you put, store or display them? What methods will you use to ensure that the public or a given community can engage with the project and, later, with its outputs? There are a range of options – speaking to experienced partners is one way using existing expertise.

Sustainability

Finally, how will your project ensure that benefits and outcomes will be felt beyond the life of the project?

This is an important area and is about maximising the opportunity the project has created. In other words, ensuring the project has got the most out of the money received, for example, it may be achieved by depositing a project's archive collection with an established archive that can ensure access on the project's behalf; through a website; through a publication given free to libraries and schools; or through the transfer of skills and experience. Remember, if your project is important enough for you to spend the amount of time and energy required to plan and deliver it successfully, then it's important enough to ensure that the benefits last as long as possible.

Compiled by Izzy Mohammed, June 2007

www.connectinghistories.org.uk