



Culture and learning

Creating arts and heritage education projects



THE ARTS COUNCIL OF ENGLAND



The Heritage Lottery Fund distributes money raised by the National Lottery. Every year we help millions of people throughout the United Kingdom to celebrate, look after and learn more about our varied heritage. From our great museums and historic buildings to local parks and beauty spots, or recording and celebrating traditions, customs and history, our grants open up our nation's heritage for everyone to enjoy.

Heritage Lottery Fund
7 Holbein Place
London SW1W 8NR
Phone: 020 7591 6000
Fax: 020 7591 6001
Textphone 020 7591 6255
www.hlf.org.uk

Helpline 020 7591 6042, enquire@hlf.org.uk

THE ARTS COUNCIL OF ENGLAND

On 1 April 2002 the Arts Council of England and the 10 Regional Arts Boards joined together to form a single development organisation for the arts. The new organisation is responsible for developing, supporting and promoting the arts in England. We distribute public money from Government and the National Lottery to artists and arts organisations.

Arts Council of England
14 Great Peter Street
London SW1P 3NQ
Phone: 020 7333 0100
Fax: 020 7973 6590
Textphone 020 7973 6564
www.artscouncil.org.uk

enquiries@artscouncil.org.uk
© Arts Council of England, September 2002
ISBN number: 0-7287-0885-X



Download this publication, and find details of how to order print copies, at:
www.artscouncil.org.uk/news/publicationsindex.html or www.hlf.org.uk

If you need copies of this publication in large print, on audiotape or in any other format (including other languages), please contact either the Arts Council Information department on 020 7973 6453 or the Heritage Lottery Fund Information department on 020 7591 6042. If you need copies in Welsh, please contact the Heritage Lottery Fund Information department.

Acknowledgements

The Heritage Lottery Fund and the Arts Council of England would like to thank Sheila McGregor and Felicity Woolf, who researched and wrote the text; illustrator, Nicky Dsupays; and the many organisations which provided project examples. Design © 2002 Oxygen www.oxygensplash.com

Culture and learning

Creating arts and heritage education projects

Introduction

This guide aims to help people working in the arts and heritage sectors to plan and deliver high-quality education projects. The Heritage Lottery Fund and the Arts Council of England have commissioned the guide with the aim of increasing access for as many people as possible. The guide sets out to provide those with responsibility for widening access with:

- clear and practical advice
- examples of good practice
- details of other resources.

'Culture and learning' is a flexible framework which can be used in many different situations and for many different kinds of projects.

Equal opportunities

Education projects can enrich people's lives by helping them to enjoy, take part in, know more about, and take pride in the arts and their heritage. This guide is based on the principle that experience of the arts and heritage should be open to everybody, regardless of their race, sex, age, religion, ability or social background.

Who is the guide for?

'Culture and learning' is designed to be useful to the full range of organisations and groups (large, small, funded, private or voluntary) involved in arts and heritage activity. It will be most helpful to those organising education and access projects for the first time. It will also help teachers and leaders of groups taking part in education projects. The guide will be of interest to:

- education and outreach officers
- managers and artistic directors
- local-authority officers
- funders
- voluntary groups
- teachers
- youth leaders
- artists working in education
- parents, carers and visitors.

What do we mean by education projects in the arts and heritage?

The guide is concerned with activities which aim to:

- increase knowledge, understanding and enjoyment of the arts and heritage
- use the arts to increase knowledge and understanding of heritage, and vice versa
- develop skills in the arts
- develop skills relating to conservation and recording the heritage
- provide opportunities for personal development and growth
- reduce the number of people who feel excluded from society by increasing access to the arts and heritage.

Such activities may contribute to formal and informal learning, and may benefit:

- pupils and teachers in schools, colleges and universities
- youth and community groups
- families, groups and individuals in their leisure time.

The word 'arts' is used for the full range of arts activity, including:

- performing arts
- visual arts and crafts
- combined arts
- architecture and design
- media, writing and broadcast arts
- film and digital technology.

In the guide, the word 'artist' is used to describe people working in any, or a combination, of these activities.

The word 'heritage' is used to describe:

- natural habitat and the countryside
- urban green spaces, including parks
- archaeological sites
- historic buildings and sites
- museums, galleries and their collections
- historic library collections and archives, including photographic, sound and film archives
- industrial, transport and maritime heritage
- cultural heritage, including customs, traditions and spoken histories.

Arts and heritage activities may take place anywhere – at specialised venues, such as galleries, theatres, arts centres, museums, archaeological and historic sites, or at non-specialised venues, such as schools, village halls, youth clubs or other accessible public spaces.

How the guide is organised

The guide is organised into three chapters.

Page

1 Context and planning – getting the foundations in place	5
2 Implementation – making it happen	17
3 After the event – taking stock	27

Each chapter discusses the main issues and has examples from a wide range of projects. There are resource sections at the end of chapters 1 and 2, with contacts, websites and further reading.

There are six appendices which provide more detail about some of the issues mentioned in the guide. These are as follows.

- Appendix 1 – Sample project timetable
- Appendix 2 – Headings for an income and expenditure budget
- Appendix 3 – Practicalities checklist
- Appendix 4 – Legal matters
- Appendix 5 – Recruitment checklist
- Appendix 6 – Marketing checklist

1 Context and planning

getting the foundations in place

Focus

Successful projects are based on good research and wide consultation. Spending time on planning will help you clarify and agree the thinking behind your project. This chapter helps you answer some of the questions necessary to get the foundations right.

- What kinds of learning activity are most appropriate?
- How will the project fit with your education policy?
- What is the need for your project?
- Who are your key partners?
- What is your main aim?
- What are you specifically trying to achieve?
- How will you know if you have achieved your objectives?
- How will you evaluate your project?

What kinds of learning activity are most appropriate?

There is a wide range of educational activities in the arts and heritage. Some only last a limited time, or are one-off events, while others may be permanent or part of an ongoing programme. Throughout the guide we use the word 'project' to describe all these activities.

Examples include:

- tours, talks, lectures and demonstrations
- classes and master classes
- practical workshops
- 'artist in residence' schemes
- performances, exhibitions, dressing up and role play, re-enactments and productions specifically for educational purposes
- handling collections and working with real objects
- labels, worksheets and guided trails
- printed and on-line resources for teaching and learning
- computer technology and interactive displays.

Each of these examples will give opportunities for different teaching and learning experiences. To help decide what would be most appropriate for your situation, have you thought about:

- the strengths of your artistic resources or heritage asset?
- the skills of your staff?
- if you have enough staff (capacity) to carry out education work?
- how you can match the available skills and staff to the people who will benefit from your project?

'The Elphinstone Kist' is a collection of literary material in Doric, the dialect of north east Scotland. It was commissioned by the Elphinstone Institute at Aberdeen University with the aim of introducing local schoolchildren to the region's rich linguistic heritage and recording the use of Doric today. Led by dialect poet Sheena Blackhall and fellow writer and former teacher Leslie Wheeler, the project created an unexpected amount of material. The organisers soon abandoned plans to publish educational worksheets and decided instead to make a web-based collection. Users not only have access to a range of Doric sources (poems, songs, stories and so on), but can also listen to it being spoken on the website's multi-media facility. As an educational resource, the website ideally suits a project involving written and spoken language.

You need to think carefully about the teaching and learning styles and activities which are most likely to attract your target audience, especially if you are aiming to widen access to the arts and heritage for children and young people, or for disadvantaged groups, such as people with learning or other disabilities.

South Lanarkshire Council Education Resources set up a film and video facility for young people to use out of school. Pupils from 14 local schools made a series of 'video shorts' by working on a 10-week programme of video workshops after school. These workshops continued as a film school during the holidays, with a celebratory screening of the results at Glasgow Film Theatre. The organisers know that young people identify with and are keenly interested in film, video and interactive media technology. The programme has had a noticeable effect on the motivation and self-esteem of pupils who otherwise find it difficult to get involved with learning.

Some people may only visit a heritage or arts centre once, whereas others may make many visits and want to learn something new each time. Have you thought about permanent educational resources and one-off, special activities which will continue to attract your regular audience?

The London Wetland Centre has a range of educational resources, events and activities that are appropriate for many age groups and different kinds of visitors. Simple facts about wetlands are explained through computer screens which are built into sturdy wooden structures on the path beside the wetland areas. More in-depth information about birds and their habitats is available on lift-up laminated labels. Regular visitors to the centre can enjoy bird-watching in the hides set around the larger ponds, while an interactive discovery centre, aimed at children, families and school groups, explores the wildlife and habitat of wetlands. Wardens also lead regular tours and one-off events.

Getting a direct sensory experience by handling collections can be a powerful way of introducing people to the arts and heritage. Do you have objects which could be safely used in this way, either at your venue or out in the community as loan collections?

For many people, information and activities provided on computer can be a way of getting actively and confidently involved with the arts and heritage. Computers can also bring in extra information and ideas from outside, and allow you to give access to your artistic product or heritage asset beyond the boundaries of your building or organisation.

Wolverhampton Art Gallery's 'Creation' project has involved producing a CD-ROM based on 20 paintings from the collection. Its purpose is to support gallery visits with activities which can take place in the classroom before or after the event. With the help of artists skilled in using animation software, a number of local schools have made narrative (talking) animations which use the pictures featured in the CD-ROM as a starting point. The same package of digital materials, designed with help from MA students at the University of Wolverhampton, has proved equally popular with other user groups in the gallery's education rooms.

How will the project fit with your education policy?

The process of developing an education policy helps organisations reflect on their strengths and identify new areas of work. The policy provides a framework which shows:

- why the organisation carries out education work
- the place of education work in the organisation's activity
- the kinds of educational activities the organisation wants to do
- who is responsible for education work
- what resources are set aside for education
- which target audiences the organisation most wants to work with
- the organisation's priorities for the next one to three years.

'Music for Change', which is based in Kent, aims to encourage awareness of and respect for different cultures and people through music. The organisation's education policy is to promote the value of music and show how it can play a vital role in developing communities, bringing people from different backgrounds together and working against racism. A Lottery grant for a three-year project called 'World Music in Education' will fund an improved website, new information services, in-service training for teachers, and long-term evaluation of 'Music for Change's residency programme in schools. By working with experienced workshop leaders from around the world, the project aims to develop multicultural music throughout the South East region.

What is the need for your project?

Educational activity is most likely to be successful if it:

- responds to an identified need
- targets a specific audience or user group
- provides something new.

To find out if your project is responding to a need, it is important to be aware of educational priorities at local, regional and national levels. To identify your target audience, you need to be aware of local circumstances, such as the social, economic, educational and ethnic backgrounds of the people likely to benefit from your project.

Education projects can make an important contribution to delivering equal opportunities by widening access. Projects can be targeted to meet the needs of groups, such as people from different cultural backgrounds, people with learning difficulties and people with disabilities, to make sure that they have opportunities to take part in, learn about and enjoy the arts and heritage.

To find out about local needs have you:

- analysed feedback from your existing educational activity?
- researched local population information, using sources such as local authorities' and regional agencies' websites?
- consulted with local groups, such as teachers, youth leaders, voluntary and community groups, local arts and heritage groups?
- consulted with local-authority officers with responsibility for the arts and heritage or education?
- consulted with local ethnic-minority and religious groups?
- consulted with local groups for people with disabilities?

Junction Arts in the East Midlands organises an annual Children's Festival at Bolsover Castle in partnership with English Heritage. When planning the festival the organisers took account of local population statistics as the population of Bolsover and district is 99% white and 1% all other ethnic-minority groups. Consultation with local schools showed that children's exposure to the arts of other cultures is very limited and that several OfSTED inspections had identified this as an area in need of attention. So, in 2001 the Festival had a wide-ranging programme of dance, music and visual art involving artists from each of the five continents of the world. Since then, Bolsover has become one of five target areas in the East Midlands for the Government's 'Resolving Differences' programme, and the 2002 festival will continue to have a broad cultural focus.

Educational activities in arts and heritage aimed at schools should be closely linked to teachers' needs in delivering a set curriculum. There are also opportunities to help teachers develop approaches to cross-curricular learning such as environmental education and education for citizenship. The citizenship curriculum helps young people gain the understanding, skills and knowledge to play an effective role in society at local, national and international levels.

Cartwright Hall Art Gallery in Bradford aimed to bring together the study of language and literacy, information and communications technology (ICT) and art at Key Stage 2 in a Museums and Galleries Education Programme project funded by the DfES. Gallery education staff and teachers developed strategies to help children respond to works of art by British and Asian artists through discussion, creative writing and practical activities. The project resulted in the creation of a specially-designed mobile education unit, ArtIMP, which uses interactive digital resources and is available to teachers, school groups and the public throughout the Gallery.

Who are your key partners?

One of the most important ways of reaching new audiences and delivering effective projects is by working with others. Partners may be needed to:

- provide a link to a new audience group
- provide funding
- provide specialist advice, knowledge and skills
- deliver activities or help to deliver them
- interpret material and guide visitors
- develop resources
- make sure the project has the greatest effect possible before, during and after it has been put into practice
- suggest new projects and new ways of doing things.

Partners can be:

- local authorities
- regional funders
- formal and informal education providers
- the voluntary and community sector
- the private sector.

'Access to Oxfordshire' is a joint initiative involving 15 museums and their local communities. It receives funding from the Heritage Lottery Fund and aims to create a support network for people to talk about their experiences, past and present. People from museums, libraries, adult and community education, arts organisations, housing associations and the University of the Third Age (an educational organisation for older people), as well as individual artists and local historians, took part in early consultation. This then led to the creation of an Oxfordshire Reminiscence Network, which will encourage partnership across sectors, support good practice and encourage new ideas and projects.

What is your main aim?

The research you did to work out the need for your project will have helped you begin to clarify the main reason for doing the project. This is your main aim. However, when you gather together all the partners and staff involved within your organisation to discuss your project, there are likely to be many different agendas. Wherever possible, try to agree on one main aim and express different agendas through separate and more specific objectives. (Objectives are smaller steps which need to be taken to achieve an aim.) If this is not possible, try to limit the number of aims to two or three.

The arts organisation 'Dr Fosters' worked with Gloucestershire Social Services, a voluntary-sector charity, South West Arts and Gloucestershire College of Arts and Technology to investigate the effect that taking part in the arts can have on people struggling to gain basic skills. They agreed that the main aim of their project was to show the vital role the arts can play in introducing those who have basic literacy and numeracy needs to educational opportunities. One of the project's target groups was teenage parents at a 'drop-in' centre, who were encouraged to express themselves in writing by taking part in drama and the visual arts. Another part of the project involved research into the use of the arts by agencies teaching basic skills to adults.

What are you specifically trying to achieve?

To fulfil the aim of your project, you need objectives – particular things you and your partners want to achieve as a result of the project. Well-focused objectives will help you deliver a high-quality project and provide a framework to evaluate performance. Ideally, your objectives should be SMART – Specific, Measurable, Achievable, Realistic and Timed. They will be quantitative or qualitative. Quantitative objectives focus on the number of people affected by the project, such as increasing the number of visitors or increasing the percentage of a target group taking part. Qualitative objectives focus on the effect of the project on people's experience, knowledge, attitudes and feelings.

'Mermaid's Purse' is a pilot project in the northwest of England which aims to raise awareness of coastal issues and the UK's maritime heritage among young people.

The project's main objectives are to:

- increase the number of opportunities for the continuing professional development of teachers (quantitative)
- promote a positive attitude towards the maritime environment among young people aged 11 to 16 (qualitative).

The project itself is a partnership between 'Living Earth' and the Morecambe Bay Partnership, working with St Martins College (Lancaster).

It is a good idea, where possible, to limit the number of objectives for a project, and to make sure that each objective contains just one clear idea.

How will you know if you have achieved your objectives?

Part of the process of setting objectives is to agree measures of success – also known as 'success criteria', 'performance indicators' and 'learning outcomes'. Measures of success allow you to judge when you have achieved your objectives.

Types of success measures for arts and heritage education projects are likely to be:

- increases in people taking part
- people gaining more skills, knowledge or understanding
- personal or social change.

Here is an example from the Mermaid's Purse project.

Objective	Measure of success
To increase the number of opportunities for the continuing professional development of teachers.	<ul style="list-style-type: none"> • A certificate for continuing professional development in environmental education (maritime) has been designed and approved. • 15 teachers have gained the certificate. • Teaching materials have been developed and approved and are now in print and on-line.
To promote a positive attitude towards the maritime environment among young people aged 11 to 16.	<ul style="list-style-type: none"> • Young people in the north west region show an increased awareness of coastal heritage issues and are willing to look after the coastal environment.

To set realistic measures of success, you need to know where you are starting from. This is known as your 'baseline' data.

Examples of questions to collect baseline data	Examples of questions to set measures of success
<ul style="list-style-type: none"> • How many people took part in our last project? • How many people from our target groups usually come to our events? • What does a group of people taking part know about a subject, issue or art form now? • What are the personal and social difficulties experienced by a group of people now? 	<ul style="list-style-type: none"> • How many people would we like to take part this time? • How many people from target groups would we like to come this time? • What new things would we like them to know after the project? • In what ways would we like the project to have a positive effect on those people?

If you are targeting schools, it is very important that teachers can understand clearly how the planned measures of success link to programmes of study. In informal learning, measures of success concerned with personal development and inclusion, such as raising self-esteem and increasing confidence, will also be important. Everyone taking part in a project should be involved in setting measures of success.

Thinking about what might be achieved during the project, when it is finished and in the longer term, will help you focus on the lasting success of your project, and how it will affect your organisation's development. For example, if one of your measures of success is that people make repeat visits, or want to develop their skills further, will you be able to satisfy this demand with appropriate activities in the future?

How will you evaluate your project?

Evaluation is important because it allows you to:

- reflect on what is happening and improve practice during the project
- learn from experience
- prove what happened as a result of the project.

Evaluation needs to be discussed from the very beginning, to help you set your aims and objectives and put the project into practice. Leaving evaluation until the end means that you cannot collect evidence before or during the project, when the experience of everyone involved is still fresh. By evaluating your project as you go along you can get a clear picture of what is happening at each stage, reviewing progress and making adjustments where necessary.

Evaluation is different from documentation and monitoring.

- Evaluation is concerned with making judgements, based on evidence, about the value and quality of a project against agreed objectives.
- Documentation is about keeping a record of what happens throughout a project.
- Monitoring is a way of checking that all parts of the project are going to plan.

You can carry out evaluation yourself using existing staff resources or by commissioning an external evaluation. There are advantages and disadvantages to both approaches.

Walsall's new art gallery and the borough's museums secured funding from the DfES for teachers to work in the gallery, and appointed a co-ordinator to run the project. This meant teachers from 14 local secondary schools worked with specially-recruited subject experts to create boxes of teaching materials and programmes of study based on the collections. The long-term aim of the project was to work towards a written guarantee of cultural education and experiences for the borough's schoolchildren. As the project was complicated, staff decided to commission external evaluation from consultants with experience of museum and gallery education. Using a combination of observation, interviews and questionnaires, the consultants produced a report which shows the project's many strengths and provides useful lessons for the future.

Whether you choose self-evaluation or external evaluation, or a combination of the two, you need to plan what evidence you will collect, who will collect it and how. There are many ways to collect evidence for evaluation before, during and after a project. To choose the appropriate methods for your project, you need to ask:

- will the methods give us the quantitative and qualitative evidence we need?
- are the methods 'user-friendly' for everyone involved?
- do they take account of equal opportunities issues?
- is it clear how evidence will be used, and if it will be credited to individuals?
- will evidence be collected from a wide range and number of people involved in the project?
- will we get different points of view to make the evidence convincing?
- can evidence be collected without disrupting the project, perhaps as part of a daily routine?

Finally, in planning evaluation, you need to think about when partners and stakeholders can review the evidence collected:

- as the project is happening, so that adjustments can be made if necessary
- at the end of the project, so that conclusions can be drawn.

Resources

Policy

'Writing a Museum Education Policy'
Eilean Hooper-Greenhill, 1996
Museums and Galleries Commission
(now Resource)

This guide was written with museums in mind, but the guidelines can also apply to the arts, and natural and built heritage.

www.resource.gov.uk

Resource: The Council for Museums, Archives and Libraries publishes a number of helpful briefing papers on a range of different topics (for example, 'Developing a Policy for an Education Service', 'Developing an Interpretation Strategy' and 'Developing an Access Policy'). The website also contains information about the 'learning and access framework' currently under development for museums, archives and libraries.

Information and communications technology (ICT)

'A Netful of Jewels: New Museums in the Learning Age'
National Museums Directors' Conference, 1999
This document shows the findings of a conference which looked at the developing role of ICT as a tool for learning in museums.

www.becta.org.uk

The British Educational Communications and Technology Agency is the lead advisory organisation for the use of ICT in schools.

www.learning-circuit.co.uk

Learning Circuit manages and provides advice to projects which use ICT in education. Its website is a useful source of information and contacts.

The National Curriculum

www.nc.uk.net

This website provides information about curriculum content by subject and key stage, and has hotlinks to equivalent sites for Scotland, Wales and Northern Ireland.

www.standards.dfes.gov.uk/schemes/

This website outlines schemes of work for each national curriculum subject. It is often a useful source of links for arts and heritage education projects.

www.qca.org.uk

The Qualifications and Curriculum Authority website gives a summary of the national curriculum and provides information about the syllabus through hotlinks to the various examination boards.

www.accac.org.uk

Qualifications, Curriculum and Assessment Authority for Wales

www.ltscotland.com

Learning and Teaching Scotland

www.ccea.org.uk

Northern Ireland Council for Curriculum, Examinations and Assessment

www.ofsted.gov.uk/inspect/index.htm

The OfSTED Chief Inspector's annual subject reports are a good source of information about the national curriculum in England and Wales and schemes of work.

Evaluation

'Partnerships for Learning: a guide to evaluating arts education projects'

Felicity Woolf, 1999

Regional Arts Boards and the Arts Council of England. Available from Marston Book Services
Phone: 01235 465500

This is a step-by-step handbook with a five-stage approach to evaluation. The guide has case studies, examples and helpful tables and checklists.

www.swmuseums.co.uk

The South West Museums Council website offers excellent advice about how to carry out evaluation and develop an educational strategy. You can access it through the link to the Museum Learning Initiative.

'Prove It! measuring impacts of renewal'

Groundwork UK, 2002

This is a report resulting from the evaluation of Barclays SiteSavers, a national programme to reclaim derelict areas for community use. The evaluation was particularly concerned with qualitative changes that have a lasting effect on communities, such as building confidence and trust.

You can get copies from:

Barclays SiteSavers

Groundwork UK

85-87 Cornwall Street

Birmingham, B3 3BY.

Phone: 0121 236 8565

Good practice

'Learning through Culture: The DfES Museums and Galleries Education Programme: a guide to good practice'

Research Centre for Museums and Galleries, 2002

You can get a copy of this from:

Research Centre for Museums and Galleries

University of Leicester

105 Princess Road East

Leicester, LE1 7LG.

E-mail: rcmg@le.ac.uk

You can download it from www.teachernet.gov.uk

Access

'The Disability Directory for Museums and Galleries' Resource, 2001

This is a collection of background material, examples of good practice, and resources, and is useful for all types of organisations. It costs £25 and you can get it from Resource publications by phoning 020 7273 1458. You can also get it on their website at www.resource.gov.uk

2 Implementation

making it happen

Focus

There are many issues to consider when putting your education project into practice. This chapter will help you develop the practical details of a project plan, including the following.

- The timetable
- Managing the budget and your finances
- Fundraising
- Managing the project
- Recruiting staff
- Working with artists and freelance specialists
- Working with volunteers
- Training and developing staff
- Marketing
- Documentation

The timetable

As you plan your project, you will want to make sure that your timetable is realistic. It can take longer than you expect to recruit new staff and make people aware of your plans. You will also need to take account of deadlines for publicity material. Schools especially are under pressure at certain times of year, and may not be able to respond to your project. To prevent difficulties arising:

- consult with all partners and stakeholders, including your target audience and visitors
- set appropriate review dates and milestones
- build in extra time to allow for unexpected delays.

You can present your timetable in many different ways. Charts like the one in Appendix 1 have the advantage of showing at a glance how stages of a project relate to each other.

The KIC Project in Belfast is responsible for 'Energy Plan', a three-year programme of drama-skills training for young people from areas of special need throughout Northern Ireland. Because of the difficulty of attracting young people outside mainstream education, the recruitment phase lasted between six and nine months. Publicity began six months before the project started, through open workshops which continued once the project began. In the early stages, another objective was to find out what style of drama training would best attract the target audience. This meant it was important to work at a slow but steady pace. The staff of KIC stress that the work they do takes time to develop and have convinced their funders of the need to focus as much on the process as on the final product.

Managing the budget and your finances

To cover the costs of your project, you may be applying for grant aid, hoping to gain sponsorship, using internal budgets or earning revenue by charging the people taking part, or using a combination of all of these. In all cases, you will need to be able to show that your expected income will be the same as your expenditure (what you will be spending on your project). A basic principle of budgeting is that income and expenditure should balance.

You will need to prepare an income and expenditure budget, which itemises the sources of your income and shows your costs as accurately as possible.

It can be difficult to estimate exactly how much a project will cost, especially if you are carrying out something new. Some difference between expected and actual expenditure is entirely normal. You should update the expenditure side of the budget regularly with actual figures.

Make sure that you have included VAT (currently 17.5%) when you are working out expenditure. It is worth checking with an accountant to find out if your organisation can reclaim any VAT.

Appendix 2 shows categories of income and expenditure to help prepare a budget.

When drawing up your budget, you must make sure that:

- income targets are realistic, achievable and based on evidence
- estimates for major items of expenditure have been secured on a competitive basis

- you have included an amount for emergencies and unexpected events (contingency) – normally 5% of your total budget
- fees and salaries are based on the recognised professional rate of pay for the job and include employer's National Insurance and superannuation contributions (known as on-costs) if you are not employing staff on a freelance basis.

As well as an income and expenditure budget, you should also prepare a cash-flow budget. This shows what money will be coming in and out of your project's bank account over time, for example every week or every month throughout the project. A cash-flow budget helps you make sure that you have enough funds available to pay your bills and not become overdrawn.

Before you start the project itself, it is worth taking time to work out an accounting system which will help you manage the project efficiently. Make sure that you tell everyone in your organisation about any special financial procedures they must follow.

Fundraising

Once you have decided what you want to do and how much it will cost, you may have to raise funds to make it happen. You may even decide it is worth employing a professional fundraiser. You need to decide whether to look for business sponsorship or to concentrate on charitable trusts and foundations. Whichever path you choose, there are some basic principles to bear in mind.

- Fundraising needs to take place well before your project starts. You are likely to need at least six months and in many cases much longer.
- It can be helpful to break your project down into a 'shopping list' so that funders can choose which part of the project they would most like to fund.

- Funders usually have clearly stated priorities. Make sure that your project matches these. Some funders are happy to discuss these with you before you apply, which can be helpful in clarifying priorities.
- If your application is successful, make sure you draw up a contract or agreement which sets out the terms and conditions of the funding arrangement. This should include information about how you will acknowledge the funder's involvement with your project.

The organisation Project Ability creates opportunities for people with physical and learning disabilities and mental-health problems to take part in the visual arts. Although its main costs are covered by revenue grants from Glasgow City Council and the Scottish Arts Council, individual projects often depend on creative fundraising from charitable trusts and other sources. One of its most successful recent projects allowed staff and children at four special schools in East Ayrshire to develop their creative skills alongside professional visual artists. This led to an exhibition at the local art gallery in Kilmarnock. The project costs were met by an initial grant from the local authority, which allowed Project Ability to secure further funding from Children in Need and the Bank of Scotland. The local authority is now committed to further investment, and one of the schools has itself made a successful bid for funding from the Coalfields Regeneration Trust, which is part of the European Social Fund.

Managing the project

It may be possible to manage your project in-house if you believe your organisation is able to cope with its demands. On the other hand, you may decide to recruit new full- or part-time staff, employ artists, use volunteers, or involve freelance workers.

The Playhouse Community Arts Centre and Context Gallery in Derry, Northern Ireland, wanted to expand their long-established outreach programme. With Lottery funding, they have employed a project development worker to put an ambitious three-year programme of arts activities for groups of people with special needs into practice. The project is called 'In from the margins: bridging the gap' and targets young people at risk (from drugs, teenage pregnancy, homelessness and so on), adults with physical and learning disabilities, people with mental-health problems and men in prison. After a pilot phase, the various partners involved with the programme have formed an advisory group to support and guide the development worker in planning future activities.

Whatever your situation, you will need to be sure that you can show:

- who is in overall charge of the project
- who else will be involved with organising it
- how new responsibilities will fit in with existing ones
- how those involved will communicate with one another
- the responsibilities of any steering or advisory groups
- how progress will be monitored and reviewed
- how you will provide practical and administrative support for those involved.

To manage the project, you also need to organise the physical resources efficiently, such as accommodation, equipment, materials and technical support. The checklist in Appendix 3 will help you think about practical details which could help your project run smoothly.

Anyone managing a project should be aware of their legal obligations. Appendix 4 lists the main laws, including the Protection of Children Act 1999, which will affect education and access projects.

Recruiting staff

Your project is likely to involve a range of different people, including permanent staff, artists, volunteers, freelance consultants and partner organisations. If you are creating new posts or employing freelance workers, you will need to look at the practical implications of taking on extra staff. For example, can you provide office accommodation and equipment? Have these items been costed into your proposal?

Appendix 5 highlights some of the questions you will need to ask yourself as you draw up job descriptions, organise interviews and make appointments. Remember that public-funding organisations will want to be reassured that recruitment has taken place fairly and in line with good equal-opportunities and human-resource practice.

Working with artists and freelance specialists

Educational and access projects often involve working with artists or other freelance specialists, whose skills and expertise may be the central focus of your project or may help you achieve other aims.

Art Discovery, a trust in the Orkney Islands, has often used many types of activities to show the Islands' rich artistic and archaeological heritage. The major Iron Age conference which took place in Orkney in September 2001 was the launch pad for the trust's latest project with the Friends of the Orkney Archaeology Trust, their parent organisation and the Orkney Heritage Society. The project is called Minehowe Know How and it brings local sites and artefacts to life by using the skills of professional musicians and artists, archaeologists, people

specialising in ancient cultures, and craftspeople working with amber, bronze, iron and gold. International interest in this programme is growing fast, with artists and other people travelling from Lithuania, Poland, Sweden and Canada to take part.

Whatever your ultimate aim, you will want a good working relationship with the people you employ. Below are some of the things that will help you achieve this.

- A shared understanding of the project's aims and measures of success.
- If possible, involving all staff in planning the project.
- Matching the skills of your staff, and artists and specialists, and the needs of the project.
- A detailed contract that you both agree on.
- A professional rate of pay for the job, not forgetting travel and expenses.
- Clear channels of communication.
- Adequate levels of practical support.
- Clear management.

Funding and advisory organisations have a detailed knowledge of the sector and may be able to recommend suitable artists or freelance specialists to you. They may also be able to offer you advice about contractual matters. The benefits of working with creative professionals are potentially enormous, as they will often challenge accepted practice and encourage you to think creatively about familiar issues.

Manchester Museum decided to commission artists to help redesign the museum's displays as part of a refurbishment. As they had no in-house art expertise, the director took external advice and then invited six artists to respond to a very detailed brief. His main concern was to make sure that the artists would become as involved as possible with the Museum. The success of the commission relied on this initial selection process and the relationship of mutual trust and understanding between the artists and the Museum. The artists chosen were Richard Wentworth and Bridget Smith.

Working with volunteers

Many projects rely on volunteers, whose knowledge, goodwill and enthusiasm make a vital contribution to a project's success. Volunteers vary enormously in their backgrounds and motivation. Some offer their services out of civic pride and community spirit, while others may be looking to gain new skills or further a career. You will get the best out of your volunteer force if you follow these steps.

- Ask volunteers to fill in an application form and supply references.
- Clarify expectations on both sides at the start.
- Provide some kind of induction or initial training.
- Try to match individual skills to particular tasks.
- Put a member of your team in charge of volunteers.
- Consult volunteers about your project and let them know their contribution is valued.
- Involve volunteers in team training activities.

Bethesda Artworks is an artist-led organisation, based in Rhondda in South Wales, which specialises in creating ceramic artworks. Much of its work is commissioned by schools to improve the school environment and extend children's experience of the visual arts. Wherever possible, the children's parents are encouraged to get involved, with the result that many have gone on to develop new skills and even gain Open College Network accreditation for their efforts. The experience has inspired one parent to start a fashion-design course at the local technical college. The artists who run Bethesda Artworks see their partnership with voluntary helpers as a way of leaving something worthwhile behind once each project has ended.

Training and developing staff

Many projects break new ground and so make increased demands on the people concerned. With this in mind, you may want to organise training for certain members of your team, to develop their confidence and skills so they can carry out particular tasks. Although it is sometimes tempting to see training as an optional extra, it is often essential to the success of a project.

Training works best when it is:

- carefully timetabled
- carried out by people with the appropriate expertise
- set at the right level for the people receiving it
- budgeted for realistically
- linked with an organisational training plan.

The table below shows the benefits of some different types of training.

For longer-term projects, which need to develop gradually, it may be possible to link training to tried-and-tested continuous professional development programmes, accredited qualifications or initiatives such as Investors in People. The main training organisations for the arts and heritage sectors will be able to offer you up-to-date information about the latest training initiatives.

Museum Fever is a DfES-funded project which involved Salford Museum and Art Gallery and Salford Foyer, an organisation providing accommodation and access to training for young people in need. Staff from both organisations took part in an informal training session where they found out about each other's organisations and discussed the issues surrounding museums and young people. They also looked at museums and galleries elsewhere to come up with ideas about how museums can better cater for young people. Through training and discussion, the group developed their commitment to the project. Six members of the group have enrolled for NVQs in heritage and visitor care, and the work they have already carried out will be accredited.

Training method	Benefits
Investigation of similar initiatives	Can help with planning and increase your knowledge of good practice.
Mentoring and shadowing	Provides opportunities to have regular contact with more experienced professionals in your particular field. A relatively cost-effective way of providing training.
Staff exchanges and skills sharing	Give staff the chance to observe different ways of working.
Conferences and seminars	A source of ideas, information and debate. These events can help you think about philosophical issues and learn from the experience of others. They can also celebrate and raise the profile of your education project and organisation.

Marketing

From the moment the idea for your project takes shape, you will be thinking about how you will get people interested, such as partners and funders. Marketing will be something that supports your project from beginning to end. Effective marketing takes time, especially if you are working with disadvantaged communities where people have little experience of taking part in arts and heritage events.

The Gateway Project, managed by the Welsh Historic Gardens Trust, has opened up the historic parks and gardens of Wales to many new groups of people, especially from disability organisations and ethnic-minority communities. To help build personal relationships with these groups, an access officer organised over 70 tailor-made visits to historic gardens, involving 2,500 people in just 12 months.

If your project is large and complicated, you will almost certainly need to write a marketing plan, which will include an analysis of aims and objectives, your target visitors, audiences and people taking part, and an action plan with detailed costings, milestones and goals.

Appendix 6 lists some of the issues you need to think about when marketing your project.

Apsley House, the Wellington Museum, has recently started an ambitious schools programme as part of a drive to increase public access to the house. Staff worked closely with local education authority inspectors, borough co-ordinators and consultants to design a marketing strategy and publicity materials for the programme. Contacting subject co-ordinators in schools rather than head teachers generated an excellent response in increasing visits.

Documentation

Time and money spent on documentation is well worthwhile, even if it can seem an unwelcome distraction while the project itself is taking place. A good set of photographs, a video, or comments from a visitors' book can be an immensely useful resource, which could:

- illustrate an end-of-project report
- provide a memento for the people who took part
- be used as a promotional tool
- make presentations (to gain support or raise funds) more interesting
- improve future publicity material
- contribute to an archive for the organisation.

Documentation may also contribute to evaluation, but remember that evaluation is about making judgements based on evidence collected to show whether your objectives have been achieved (see Chapter 1).

Groundwork UK secured Millennium funding for a national programme of environmental projects called Changing Places. In South Wales the regional trust, Groundwork Bridgend and Neath Port Talbot, used the funding, together with money from other sources, to carry out a long-term project with the residents of a former coal-mining valley. The aim was to improve sites identified by the Garw Valley Green Strategy after consultation with local groups. With the support of landscape architects, education officers and artists, local people – particularly schoolchildren – took part in surveys, research, and the design and building of new environmental features such as railings, screens and paving stones. Children helped carry out a detailed audit of local building materials and physical characteristics which resulted in a publication called 'The Garw Green Guide'. This guide and a companion leaflet on the artworks in the Garw Valley are invaluable documents of the project.

Resources

Fundraising

There are six organisations that distribute funds from the National Lottery. Each has its own programmes and funding priorities. For more information, ring the National Lottery Funding line on 0845 275 000 or visit:
www.lotterygoodcauses.org.uk

Useful contacts

Association of Arts Fundraisers

Phone: 01242 539579

Association of Fundraising Consultants

Phone: 01582 762446

Institute of Charity Fundraising Managers

Phone: 020 7627 3436

www.funderfinder.org.uk

This is a good starting point for information about fundraising, with many links to companion sites.

www.dsc.org.uk

The Directory of Social Change website gives up-to-date information about its latest fundraising guides and how to order them. Publications include 'The Youth Funding Guide', 'The Arts Funding Guide', 'The Environmental Funding Guide', 'Fundraising Strategy' and 'Writing Better Fundraising Applications'. It also publishes separate guides to local Trusts in the North of England, the Midlands and the South of England, as well as 'The Scottish Trusts Guide'.

www.aandb.org.uk

The Arts and Business website has a helpful publications list (including 'The Sponsorship Manual') and lists the addresses of its regional offices.

www.clmg.org.uk

The Campaign for Learning through Museums and Galleries website has an excellent fundraising section, which includes a comprehensive list of funding sources for education and access projects.

Recruitment

www.unison.org.uk/online/service/localgov/index.htm

This website for the main public-sector union provides up-to-date information about local-authority pay scales.

www.nut.org.uk

The National Union of Teachers website is helpful in setting salary levels for posts with a responsibility for education.

www.jobsgopublic.com

This is another website on public-sector jobs with useful salary information.

Volunteers

You can order 'The Handbook for Heritage Volunteer Managers and Administrators' from:
British Association of Friends of Museums
The Old Post Office
High Street, Butleigh
Glastonbury, Somerset
BA6 8SU
Phone: 01458 850520
E-mail: a.heeleybafm@btinternet.com

Working with artists and freelance specialists

For museums, galleries and archives, the first points of call are the Single Regional Agencies for Museums Libraries and Archives. You can get details from www.resource.gov.uk

www.arts.org.uk

The website for the Regional Arts Boards gives details about each board, including funding schemes and information services.

www.gem.org.uk

The Group for Education in Museums website has an extensive database of freelance educational specialists and consultants.

www.axisartists.org.uk

Axis – Visual Arts Exchange and Information Services has the country's largest artist database.

'The Definitive Code of Practice for the Visual Arts' by Lee Corner is available from the National Artists Association (phone: 0800 085 7217).

Training and developing staff

The structure of the national training organisations (The Cultural Heritage National Training Organisation and Metier – the National Training Organisation of the Arts and Entertainment Industry), which are the main sources of information about training, career development and qualifications, is under review and will be replaced by sector skills councils. You can find the latest information on the DfES website at www.dfes.gov.uk

Marketing

The main guide is 'Marketing and Public Relations Handbook for Museums, Galleries and Heritage Attractions' by Sue Runyard and Ylva French (latest edition 2001). You can order a copy from the AltaMira Press website at www.altamirapress.com

3 After the event

taking stock

Focus

It is important to take stock to help you report back on your finished project and to influence your planning for the future. Thinking about the following questions will help make sure that your project leaves a lasting benefit.

- Did the project meet its aims and objectives?
- How will you tell others about the project?
- Is your organisation committed to learning?

Did the project meet its aims and objectives?

To answer this question you will need to have collected evidence before, during and after the project. A good way to make sure that you analyse the data you have collected, and that you draw conclusions from it, is to hold a review meeting at the end of your project. If possible, all partners and stakeholders, including some of the people taking part, should be present at the meeting.

The main purpose of the meeting is to decide whether or not the project was successful against the agreed aims and objectives. Good preparation for the meeting is essential, and you should provide a summary of the evidence and a clear overview of the project. Many unexpected outcomes will have emerged and these will also need to be recognised and discussed.

How will you tell others about the project?

Good practice deserves to be shared with other people. Funding organisations are eager to encourage sharing best practice and may help with the costs of publicising successful projects. You need to think carefully about which parts of your project methodology and the findings of your evaluation should be shared. You also need to

consider any issues of confidentiality or child protection. For example, you should not publish any pictures of children in print or on the Internet without getting their parents' permission. Here are some of the ways you can tell others about your project. You can:

- circulate a project report
- set up a peer-group or artist network
- hold conferences
- publish articles in newspapers, journals and newsletters
- make CD-ROMs and design websites (especially if you want to get feedback from others)
- publish educational materials, such as teacher packs
- offer mentoring and shadowing schemes (which allow people to observe and gain new skills).

'New Uses for Old Churches: Citizenship and the Historic Environment' is the title of a booklet produced by English Heritage in association with Ipswich Borough Council and Suffolk Education Business Partnership. It describes in detail how children at three Ipswich primary schools were encouraged to think about the issues surrounding the use of disused churches in the town and how the project contributed to the teaching of citizenship (increasing young people's understanding of local problems). The booklet also contains an outline scheme of work and a list of useful resources and contacts for teachers who want to explore similar issues elsewhere. For those involved, the booklet has been a way of documenting a highly-successful project and making sure that its methodology can be shared with other people in the heritage and teaching professions.

Is your organisation committed to learning?

Evaluation allows you to think about what you would do differently next time, and how you can build on the most successful areas of your project. It can also contribute to organisational change and development. The kinds of changes and developments you decide on could include:

- a second version or a continuation of the project
- a reassessment of priorities and reorganisation of resources
- recognition of the need for a new member of staff
- setting up an advisory group or a new friends' organisation
- expanding a volunteers' programme
- providing permanent resources
- continuing or extending partnerships with others
- influencing policy-makers and funders to support your work.

The Forge Arts Education Agency organised a 10-week residency in County Durham in autumn 2000 for Natyanjali, a group of sighted and visually-impaired dancers from India. Their workshops and performances inspired two local schools to raise funds to help students go to the dance school run by Natyanjali's choreographer, Ashok Kumar, in Bangalore. Other schools have used their experiences with the company to encourage creative writing and explore disability issues. Information and feedback from schools also influenced the content and design of a website about the project. The success of the residency has led all the agencies involved to think about organising another UK tour for Natyanjali.

The most effective projects are usually offered by organisations which are themselves committed to learning by:

- reflecting on and evaluating their activities
- looking for opportunities to learn more
- making sure that everyone – volunteers, staff, trustees, board members, elected representatives – sees themselves as learners.

If you are committed to these values, it is likely that you will be able to make sure that your project is as effective as possible at every level, both inside and outside your organisation.

Appendices

- Appendix 1 – Sample project timetable
- Appendix 2 – Headings for an income and expenditure budget
- Appendix 3 – Practicalities checklist
- Appendix 4 – Legal matters
- Appendix 5 – Recruitment checklist
- Appendix 6 – Marketing checklist

Appendix 1 Sample project timetable

Year 1												
	1	2	3	4	5	6	7	8	9	10	11	
Secure funding package	█											
Finalise aims	█											
Consultation	█											
Finalise content	█											
Finalise marketing plan					█							
Commission artists								█				
Prepare resource packs										█		
Put marketing plan into practice									█			
Prepare booking system								█				
Start bookings												
Training programme									█			
Artists in residence appointed												
Residencies take place												
Complete design of exhibition										█		
Commission evaluation				█								
Exhibition takes place												
Launch events												
Evaluation												
Run in-service training courses for teachers												
Write evaluation report												
Produce publication												

Key: Numbers relate to months of the year. For example, 1 = January, 2 = February, 10 = October.

Appendix 2 Headings for an income and expenditure budget

Income	£	Expenditure	£
Local authority		Staff costs	
Regional funding		• project co-ordinator with on-costs	
National funding		• administrator with on-costs	
Sponsorship		• freelance worker fees and expenses	
Donations		• training	
Trusts		Equipment	
Earned income		Materials	
• ticket sales		Room hire	
• merchandise		Documentation	
• publications		Evaluation	
• refreshments		Marketing	
Other		• design	
Total		• printing	
		• advertising	
		• distribution	
		Overheads	
		• phone	
		• stationery	
		• post	
		• insurance	
		• heating and lighting	
		• travel	
		Contingency	
		Total	

Appendix 3 Practicalities checklist

Issue	Preparation
Advance information	Have you confirmed arrangements in writing, so that the people taking part know what to expect and come properly prepared?
Travel and parking	Are your transport arrangements satisfactory and have you made adequate parking arrangements, including for people with disabilities? Have you drawn attention to ways of getting to your project and venue by public transport?
Physical, sensory and intellectual access	Does your project, venue or facilities have any particular access difficulties, especially for people with disabilities?
Signs	Is your venue adequately signposted outside? Will people be able to find their way once they are inside the building? Will they need a map?
Equipment, materials, special clothing	Do you have the right equipment and materials for your project and have you enough of both? Will the people taking part need to wear special clothing of any kind?
Refreshments and breaks	Do you need to organise refreshments and regular breaks? Where can the people taking part eat and drink?
Cloakroom arrangements	Where can people put coats, bags, children's buggies and so on? Are there enough toilet facilities?
Setting-up or rehearsal time	How much setting-up or rehearsal time will your project need? Will you need help setting things up?
Accommodation	Is your accommodation suitable for the project? Is it big enough and comfortable enough? Is it adequately equipped?
Changing and washing facilities	Can you provide performers with their own changing and washing facilities?
Technical support and maintenance	Will your project need technical support? Do you have a planned maintenance programme for equipment, props, educational materials and so on?
Supervision	Are there enough staff to make sure that the people taking part in your project have a safe and enjoyable experience?
Clearing up	Who will tidy up after the event? Is this something you can ask the people taking part to do?

Appendix 4 Legal matters

This appendix highlights the main legislation you should be aware of. However, it is not legal advice, and you should check how exactly the legislation applies to your organisation and project.

Legislation	Content
The Employers' Liability (Compulsory Insurance) Act 1969	<p>Most organisations must have employers' liability insurance. This will allow them to meet the full cost of compensation for injuries or illnesses suffered by their employees, whether caused on or off site. However, most public organisations, including government departments and local authorities, are exempt from the need to have employers' liability insurance.</p> <p>Public liability insurance covers you for claims made against you by members of the public or other businesses. In contrast to employers' liability insurance, public liability insurance is generally voluntary.</p> <p>Since insurance can be a very complicated matter, it is worth taking expert advice on what you would need. If you have volunteers, students or non-employed trainees working for you, you should ask your insurance company whether or not you should have insurance cover for them.</p>
The Health and Safety at Work etc. Act 1974	<p>Employers have a duty to protect, as far as reasonably possible, the health, safety and welfare of their employees at work. Employees also have a duty to work in line with the Act's requirements. Those in control of non-domestic premises also have a duty towards people who are not their employees but use their premises. Any organisation which employs five or more people is legally obliged to have a written health and safety policy.</p>
The Sex Discrimination and the Equal Pay Acts 1975 and The Race Relations Act 1976 and (Amendment) 2000	<p>These are major items of legislation covering employment, education, training and the way that facilities and services are provided. For more information about these issues, visit the Equal Opportunities Commission website at www.eoc.org.uk and the Commission for Racial Equality website at www.cre.gov.uk</p>
The Management of Health and Safety at Work Regulations 1992	<p>Activities involving risk must be accompanied by a written 'risk assessment' which identifies risks and explains how you plan to control them. Make sure that you and your partners have thought through the health and safety implications of your project. It can be something as simple as having a fire-evacuation strategy or as challenging as guarding the safety of a large-scale event. If you have any doubts, get advice from a qualified health and safety expert or phone the Health and Safety Executive on 08701 545500. You can also visit their website at www.hse.gov.uk</p>

Legislation

The Disability Discrimination Act 1995

Disabled people have new rights in the areas of employment, access to goods and services and buying or renting land and property. Organisations providing goods and services to the public have to take reasonable measures to make sure they are not discriminating against disabled people. It is against the law for an employer to treat a disabled person less favourably than someone else because of their disability. Employers who employ more than 20 people will also have to look at changing the workplace or the way that work is done to meet the needs of disabled workers. Phone the DDA helpline on 08457 622633 or 622644, and visit the website at www.disability.gov.uk for more information. The website of the Museums and Galleries Disability Association is also helpful: www.magda.org

The Northern Ireland Act 1998 Equality Scheme

All public organisations in Northern Ireland must promote equal opportunities between people of different religious groups, political opinions, racial groups, ages, marital status, sexuality, sexes and abilities. All public organisations must prepare, put into practice and monitor equality schemes. For more information, visit the Equality Commission for Northern Ireland website at www.equalityni.org

Protection of Children Act 1999

Childcare organisations must carry out checks against the Protection of Children Act List and 'List 99' on anyone (full-time, part-time and freelance staff and volunteers) who will have regular contact with children. Other organisations providing activities for children should also carry out checks. Many funders of arts and heritage projects that involve children or vulnerable people will need these checks as part of their funding agreement. A practical guide to the Act is available on the Department of Health's website at www.doh.gov.uk/scg/childprotect.

The Criminal Records Bureau's new Disclosure service provides a one stop shop for employment checks. For more information, phone 0870 90 90 811, visit the website at www.disclosure.gov.uk or visit the DfES website at www.dfes.gov.uk

Appendix 5 Recruitment checklist

Issue	Preparation
Job description or brief	<p>Has the job description or brief (for a short-term contract) been agreed with partners? Does it genuinely describe all the activities the employee will carry out? Does it refer to any policies your organisation has that the employee will need to take account of (for example, health and safety, equal opportunities)? Does it make clear how the post fits into your organisation's structure (that is, who the employee will report to and be responsible for)? Are you offering the going rate of pay for the job? Is the post permanent? If not, then the job description must make that clear. Do you have to carry out any employment checks? Have you explained this to applicants (see Appendix 4, Protection of Children Act)?</p>
<p>Person specification - comes with the job description and helps people judge their suitability for the post</p>	<p>Have you defined your expectations in terms of:</p> <ul style="list-style-type: none"> • experience? • qualifications? • skills? • personal qualities?
Terms and conditions of employment	<p>You should give the people applying accurate information about:</p> <ul style="list-style-type: none"> • salary or fee (including the starting level and yearly increases) • income tax, National Insurance and superannuation arrangements • car and other allowances • where they will be based • working hours (including weekends, bank holidays, time off in lieu) • holiday entitlement • whether or not the post is permanent. If not, give the length of the post with start and end dates.
Advertising	<p>Does your advertisement include all essential information? Have you budgeted adequately for the cost of advertising? Have you made sure your advertisement is distributed as widely as possible, including ethnic-minority press and disability press? Have you thought about using informal outlets for your advertisement (for example Regional Arts Board bulletins, professional newsletters)?</p>
Short-listing and interviews	<p>How will partners be involved in this process? Are there clearly set standards against which you can short-list people? Have you taken account of equal-opportunities issues? Have you got the right range of skills on your interview panel? Can you be sure that all interview candidates will be treated equally by asking the same questions and setting identical tasks? Are there clearly set standards against which interview candidates can be assessed? Will you be able to document and, if necessary, explain your decision after the event?</p>

Issue

Contract and references

Preparation

Have you received references and are they satisfactory? Have you carried out checks for people working with children and vulnerable adults, in line with legislative requirements? Can you offer the successful candidate an employment contract? This would include:

- terms and conditions of employment (see above)
- a probationary period
- sickness pay and policy
- maternity pay and policy
- disciplinary procedure
- grievance procedure
- period of notice.

Appendix 6 Marketing checklist

Issue	Preparation
Audience research	How well do you know your target groups? Can you build on previous surveys and interviews with people who have taken part in your projects before? Would marketing tools such as postcode mapping help you identify target groups?
Timing	Have you consulted your target groups about the timing of your project? Have you checked that the project will take place at the best time for them?
Setting targets	How many people do you want to take part? Are your target numbers realistic?
Personal contacts and networks	Are you making best use of personal contacts, advisory groups and networks to get people interested in your project?
Design and print	What printed publicity will you need? Will you need a designer or printer for printed publicity and how will you choose them to make sure you get the best value? When are the deadlines for preparing material for the designer or printer?
Access	Will the design of all printed materials be clear and accessible? You can contact the Royal National Institute for the Blind guidelines for printed material for advice on type size, typeface, contrast and layout. Phone them on 020 7388 1266 or visit their website: www.rnib.org.uk Have you included contact details, maps and information about public transport and disabled access? Does information need to be in community languages? Can you produce simplified versions of printed materials for people with learning difficulties?
Distribution	How will you target your publicity? Do you have a database with relevant named contacts? Are there free distribution networks, such as local education authority mailshots, which you could use?
Press and media	Have you written a press release? How far in advance will journalists need information? Can you get editorial coverage in local and community newspapers, especially those read by your target groups? Can you arrange a photo opportunity before or when the project opens? Can you get an interview on local radio to promote your project?
Customer care	Could you arrange an opening, preview or presentation for partners, people taking part, volunteers, teachers or others? Have you explained the project to all those in the 'front line' (for example, guards, wardens, volunteers, front-of-house staff, shop assistants)? How else might you gain support inside and outside your organisation?
Influencing opinion	Have you contacted opinion-formers and policy-makers, such as funders, local councillors, the local MP, community leaders, and business people, who could promote your project and help your organisation in the future?

