

# Best Practice Toolkit

Using learning to improve health and well-being in older adults



*Sounding Out Your Heritage*

## THE SOUNDING OUT YOUR HERITAGE

## BEST PRACTICE TOOLKIT

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Improving access to informal learning for older people in residential care, day care and sheltered housing settings can have an overwhelmingly positive impact on their health and confidence, and dramatically improve the quality of their lives. This **Best Practice Toolkit** will help care professionals and heritage educators understand the positive impact of on-going heritage learning, and show them how they can develop programmes of learning activity.

This **Best Practice Toolkit** shares what we have learned from running *Sounding Out Your Heritage* (SOYH) – a pilot heritage learning project for the over 60s – and contains contributions from participants, project staff and partners who were involved in the project.

This toolkit will enable more individuals and organisations to plan informal heritage learning activities with the over 60s, and explains how such activities can improve the quality of their lives. By reading through this toolkit you will:

- read about the project's outputs and outcomes;
- find out about the practicalities and potential pitfalls of working with groups of learners over a period of time;
- share in the good practice and lessons learned from the SOYH project;
- be able to develop your work in heritage learning for the over 60s;
- find ways of embedding this type of activity in your day to day work;
- look at ways of working with the over 60s to keep them living independently longer;
- learn ways of networking and finding new partners.

The **Best Practice Toolkit** is the culmination of GEM's *Sounding Out Your Heritage* project funded by the Transformation Fund as part of a 'learning for pleasure' initiative spearheaded by the Department for Business, Innovation and Skills.

GEM's *Sounding Out Your Heritage* toolkit is also available online – visit [www.gem.org.uk](http://www.gem.org.uk).

From November 2009 to March 2010, GEM's *Sounding Out Your Heritage* pilot project encouraged over 60s in Kent and Medway to come together to explore, discover

and shout about their heritage as a way of improving the quality of their lives. The six participating groups have 'sounded out' about their accomplishments in a series of celebration events. These events were an opportunity to exhibit the six finished project resources.

These resources include a book of individual stories and images; audio recordings and a memory box; a series of leaflets that highlight individuals' stories and interests; a sensory quilt inspired by the group's love of music and dance; audio recordings about a community's colourful past and a recipe book that shares stories related to favourite foods.

#### **You will find this toolkit useful if you are:**

- a senior manager of a sheltered housing scheme or care home wishing to partner with heritage organisations to deliver learning activities for your residents;
- a member of care (including dementia and nursing care) staff wanting practical help in meeting best practice requirements;
- a heritage manager wanting to develop quality learning provision for the over 60s;
- a heritage education professional wanting to find out more about working with over 60s;
- an independent learner wanting to learn some new skills;
- community leader wanting to set up a project for the over 60s



## 2 : What does the toolkit contain?

The **SOYH Best Practice Toolkit** is made up of a number of different components and these are explained below:

### 3.1 The "core" toolkit

The core toolkit is a basic, step by step guide to running a heritage learning project for over-60s, covering the strategy and planning as well as the day to day coordination. It takes you through from the very beginning – developing the project idea – to the very end – how to sustain the work in the future.

### 3.2 The In Focus and Example Documents

At the end of this booklet, you will come across In Focus and Example Documents. These provide additional guidance on specific aspects of the core toolkit; for example, a template from the SOYH project or a more detailed look at a particular aspect of the toolkit i.e. working with the frail elderly.

### 3.3 The How To practical guides

Finally, there are five How To practical guides for producing specific heritage resources. They are simple and easy to use, and can be found on separate cards at the end of the toolkit folder. They are:

- How to Record an Oral History
- How to Make Special Interest Posters and Leaflets
- How To Create a Memory Book
- How To Make a Memory Box
- How To Make a Story Quilt



### 3 : How to make the most of this toolkit

*I work for a medium-sized museum. We have won funding for learning projects before, but we haven't worked much with over-60s. Can I benefit from this toolkit?*

Yes, we would suggest reading the core toolkit to get a general sense of what this sort of project might involve.

*I run a small sheltered housing scheme and I would like to run some heritage learning activities for our residents. Is this toolkit for me?*

Yes, you should read the core toolkit for practical, straightforward guidance on how to create and plan these types of activities on their own or as part of a project. You should also read the How To practical guides, particularly if you don't have the resources to bring in extra teaching expertise. These will give you guidance on where to access resources and equipment and how to create a resource.

*I am a local pensioner. I live with my wife and we would like to photograph our historic town high street before the developers come in. Can I use this toolkit?*

Yes, the How To practical guides are perfect for this. They will help you find out where to access the equipment you need, point you to places where you can find out more about the history of the area or particular buildings and give you practical guidance on photography.

We hope you enjoy reading the toolkit and it gives you new ideas and practical tips for making learning for older adults enjoyable and accessible.



## 4 : Background information

### 4.1 About the *Sounding Out Your Heritage* project

GEM's *Sounding Out Your Heritage* (SOYH) won government funding in mid-2009 to help kickstart The Learning Revolution in Kent & Medway. SOYH was one of over 213 projects which won a grant from the £20 million Transformation Fund, launched by government to offer funding for innovative informal adult learning projects in England. The fund aimed to bring to life The Learning Revolution, a White Paper presented to Parliament in March 200

The SOYH project brought together groups of over-60s from a wide variety of backgrounds across Kent and Medway over a series of learning sessions. These sessions provided learning support to the participants to help them explore an aspect of their heritage that interested them and produce a resource which would enable others to learn about their heritage too. Over the course of the sessions, it was intended that where possible learners would begin to develop a new skill or realise other opportunities for learning which could help to sustain their informal learning activity in the future. Learning goals for each individual were identified and supported. The achievements of the learners were celebrated at an end of project event and the resources they have produced are being made widely available. The project was evaluated, and best practice as well as lessons learned from the project are being widely disseminated. GEM will continue its work with over-60s by organising professional development events for care professionals and heritage educators, and producing further resources and publications – including updating and improving this toolkit.

### 4.2 About GEM

GEM is a registered charity based in Gillingham but working across the UK and internationally to promote heritage organisations and the learning opportunities they provide for people of all ages, abilities and backgrounds. Through projects such as SOYH, GEM is helping more people find exciting new ways to learn through and about their heritage; whether that's by investigating objects from the local museum or discussing memories of a time gone by. GEM believes that heritage can help us to explore and make sense of the world in which we live.

GEM is a membership organisation with over 2,000 members worldwide. Alongside projects such as SOYH, GEM also develops and shares best practice in heritage learning through training events and publications and works in partnership with others to contribute to important government agendas such as curriculum review and Learning Outside the Classroom.

GEM is for everyone interested in learning through museums and heritage, and you can find out more about GEM's work at [www.gem.org.uk](http://www.gem.org.uk).

### 4.3 Informal adult learning

On 23 March 2009 the government launched The Learning Revolution White Paper. It stated:

"Informal learning can help people gain personal satisfaction, development and fulfilment. For the low skilled and with poor experiences of formal education, informal learning can be an important stepping stone to further learning, qualifications and more rewarding work. It can help keep people mentally and physically active and independent into old age. It can also bring people and communities together."

The White Paper described informal adult learning as follows:

"Informal adult learning is learning for its own intrinsic value. It encompasses a huge variety of activity which could take place almost anywhere: it could be a dance class at a church hall, a book group at a local library, cookery skills learnt in a community centre, a guided visit to a nature reserve or stately home, researching the National Gallery collection on-line, writing a Wikipedia entry or taking part in a volunteer project to record the living history of particular community."

The government recognised in March 2009 that there had been a gradual increase in recent years in informal adult learning activity – driven by individuals, communities and local organisations; there was a desire within the general public for learning to be part of their adult lives. But the opportunities available were often hard to find, not joined up and relatively inaccessible to those who were not independent and well-networked already.

The Transformation Fund aimed to drive and support the existing momentum for learning, particularly at a local level, but also to encourage linkage between opportunities and to embed informal adult learning into

the fabric of people's lives. For example, a local supermarket holding an evening "foods of the world" tasting session – a trip to the supermarket could lead someone to a greater interest in food, travel and world cultures; and finally to enable those with limited independence and motivation to access informal learning opportunities.

#### **4.4 Heritage**

All the projects supported by the Transformation Fund were different. GEM, drawing on its expertise in heritage and learning, focused on helping over-60s explore their heritage. Heritage is a broad term and as an adult you can encounter it in many different ways: memories, objects, buildings, traditions. Heritage is about identity and about making real, meaningful connections between the past and the present.

Adults can explore heritage in a number of ways; you can visit a museum or library and read books, see objects, take a guided tour, take part in a workshop or listen to a lecture. But for an adult with limited independence the options are more restricted. Through SOYH we aimed to make heritage more accessible to older people by encouraging them to structure and develop their own learning and identify the way in which they wanted to engage with heritage. We also attempted to link this with the development of other skills and opportunities to connect to other types of informal adult learning, for example developing audio recording skills whilst creating an oral history archive for a local area.

## 5 : Benefits of informal learning for older adults

"Inactivity and isolation accelerate physical and psychological declines, creating a negative spiral towards premature, preventable ill health and dependency."

Report of the House of Lords Select Committee on Science and Technology on Ageing, 2005

16% of the UK population is over the age of 65 and the number over the age of 85 has risen to 1.2 million (ONS, 2009). It is a fact that participation in activities decreases with age including in sports, leisure and learning and that the number of women experiencing loneliness rises to over 50% in the 80+ age group. This is recognised in the HM Government's Building a Society for All Ages (DWP, 2009). Many older people struggle to make new friends and to develop social networks as they get older. These can lead to social isolation and exclusion, which may in turn cause anxiety and depression. It is often the case that those who are suffering from social exclusion then fail to access the assistance that they need, such as primary healthcare services.

By engaging older people in informal learning activities they are given the opportunity in a relaxed atmosphere to meet new people and to discover, or in some cases rediscover, new skills. Many participants in such programmes report that taking part in these activities has improved the quality of their lives and has got them talking to other people who live near them. In some cases it has improved their level of participation in other community activities, such as attending coffee mornings and outings.

Professor Tom Schuller, head of the Centre for Educational Research and Innovation at the Organisation for Economic Cooperation and Development was quoted in 2006 in the Guardian as saying, "learning is an effective buffer against Alzheimer's disease. It doesn't prevent it, but postpones its onset and thus reduces the period for which it afflicts people." He also stated that, "there is a clear and positive link between learning and health for the elderly."

Recognising the importance of the heritage sector in combating isolation the government already provides free access to national museums and galleries. However, the majority of over 60s suffering from social exclusion tend to be found in areas of multiple deprivation and are not a natural audience for these types of establishments. Developing informal learning projects such as *Sounding Out Your Heritage* can help to engage this group of

individuals helping to prevent them from slipping into the cycle of isolation, exclusion and poor health.

The social engagement and intellectual stimulation provided by these programmes may also help treat any resulting emotional symptoms. Unfortunately, although these programmes can help to alleviate the symptoms of mental disorders they cannot be considered to be a cure.

Individuals experiencing the progression of mental disorders (specifically dementia) are frequently characterised as undergoing a "steady erosion of selfhood" through the "unbecoming" of oneself. Creativity and learning help combat the sense of isolation that may lead a sufferer to feel inferior. These feelings often manifest themselves as anxiety, frustration and behavioural problems. Heritage learning programmes, especially those held in a group setting, help eliminate a person's sense of isolation experienced by a self imposed social inclusion.

*Sounding Out Your Heritage* type learning gives people living with mental and emotional problems the opportunity to exert control through decision-making and communication which may enable them to maintain their "selfhood". It helps participants reinforce their sense of identity and acceptance while deterring the effects of debilitating illnesses. Heritage educators and housing professionals can help achieve this by respecting and acknowledging that programme participants have a lifetime of experiences, knowledge and education to contribute to group discussions. Participants are welcome and encouraged to 'sound out' and celebrate their personal stories, opinions and reflections. In doing so, heritage learning can increase an individual's sense of importance, and bring joy, friendship and a sense of belonging.

In recent years museums have begun to recognise the huge potential of the "older audience". There is no strict definition of this term but it usually refers to those over the age of 60 (although some include those over 50) most of whom will have retired from full-time paid work. Sometimes they are referred to by terms such as "silver surfers" and the "third age". This is not only a huge and growing audience – in the UK for example, they now outnumber young people – but extremely varied. They include very active and mobile individuals (some still working in a paid or voluntary position) to those who are

less mobile. Some are living independently whereas others may have long-term illnesses or suffer from some form of dementia such as Alzheimer's Disease. These individuals may require care as provided by sheltered accommodation and residential care homes.

It is now recognised good practice in care homes that new residents should be encouraged to bring personal items that hold memories of their past into their new home. Staff also help residents and their families with the creation of photo albums, collages and scrapbooks; memory boards; memory or keepsake boxes; and recorded oral histories. They organise reminiscence sessions using artefacts, and other activities using drawing, painting, modelling and other art forms (often very useful when verbal communication is limited) to generate conversation and encourage the recollections of memories.

Museums recognise the potential of the older audience and have developed programmes and activities which usually centre on reminiscence and oral history. Museums are providing activities for relatively mobile individuals, and for those less mobile there are outreach programmes which take the museum to the elderly.

It is generally recognised that reminiscence therapy provides benefits for participants who as a result are likely to suffer from less depression and be in better health. However, dwelling on unpleasant memories or living in the past is best avoided. Not everyone, for example, wants to reflect on their unhappy experiences of perhaps their childhood or the Second World War. Museums have also produced "memory boxes" – collections of artefacts to encourage reminiscence and conversation. Hampshire County Council museums service have taken this a step further by not only providing such boxes and running reminiscence sessions but also running a reminiscence training programme for care staff in residential and nursing care homes.

Oral history has proved to be a useful technique for museums which have recognised that collecting, preserving and using recorded memories is of value to both themselves and those providing the memories. For example, the Museum of London has been collecting the memories of Londoners since the 1980s and now has an oral history collection containing more than 5,000 hours of recorded life story interviews. As a result, the museum now has a better picture of what it was like to be a Londoner during the twentieth century.

A quick search of the internet will provide many references to relevant papers and articles, and links to museums working with older people. A longer list is available on the GEM website, [www.gem.org.uk](http://www.gem.org.uk), but a random few are given below to start you off:

[www3.hants.gov.uk/museum/museum-search/reminiscence-at-search.htm](http://www3.hants.gov.uk/museum/museum-search/reminiscence-at-search.htm)

[www.museumoflondon.org.uk/English/Collections/1700Today/Life-stories-oral-history.htm](http://www.museumoflondon.org.uk/English/Collections/1700Today/Life-stories-oral-history.htm)

[www.oralhistory.org.uk/](http://www.oralhistory.org.uk/)

[www.eastanglianlife.org.uk/learning/reminiscence-work/](http://www.eastanglianlife.org.uk/learning/reminiscence-work/)  
[www.liverpoolmuseums.org.uk/learning/community/adults.aspx](http://www.liverpoolmuseums.org.uk/learning/community/adults.aspx)

[www.niace.org.uk/](http://www.niace.org.uk/)

[www.mla.gov.uk/what/policy\\_development/learning/~media/Files/pdf/2009/Older\\_Learners\\_Report\\_Final\\_2009\\_2.ashx](http://www.mla.gov.uk/what/policy_development/learning/~media/Files/pdf/2009/Older_Learners_Report_Final_2009_2.ashx)

[museumvictoria.com.au/pages/3619/adult-learning-melbourne-museum.pdf](http://museumvictoria.com.au/pages/3619/adult-learning-melbourne-museum.pdf)

[www.alzheimers.org.uk](http://www.alzheimers.org.uk)

Bryden (Boden), Christine. *A Person-Centred Approach to Counselling, Psychotherapy and Rehabilitation of People Diagnosed with Dementia in the Early Stages*. *Dementia*, 1 (2002), 141-156.

Culture Unlimited, *Museums of the Mind: Mental Health, Emotional Well-Being and Museums*, <http://www.cultureunlimited.org/museums-of-the-mind.php>

Gottlieb-Tanaka, Dalia, Jeff Small and Annalee Yassi. *A programme of creative expression activities for seniors with dementia*. *Dementia*, 2:125 (2003), 127 – 132.

Kontos, Pia C. *Embodied selfhood in Alzheimer's disease: Rethinking person-centred care*. *Dementia*, 4 (2005), 553 – 570.

Nightingale, Julie. *As state of mind: What role can museums and galleries play in preventing mental illness*. *Museums Journal* (July 2009), 27-31.

Swann, Julie, *Preserving memories: using reminiscence techniques*, *Nursing & Residential Care*, December 2008, Vol 10, No 12

Zeisel, John. *I'm Still Here: A Breakthrough Approach to Understanding Someone Living with Alzheimer's*. Penguin Group (USA) Inc.: New York, 2009.

# 6 : Understanding the older adult audience

So you want to help the older adult audience to learn about heritage? But what do they really need from you. You can have a wonderful idea for a project but once you start researching your "market" you may well find that there is no demand or that your target audience is "hard to reach".. So ask and listen to your potential users and be flexible and prepared to adapt your ideas as you find out more about your audience and their needs.

## 6.1 Evidencing the need

Before getting started with the research process, identify a "need" for your project or service, note down the evidence (ideally statistical) to back it up. If you are going to develop an effective project you need to convince yourself, your management, your audience and your funders that the project is necessary.

## 6.2 A growing section of society

Between 1983 and 2008, the number of people over 65 in the UK increased by 1.5million and this age group now make up 16 percent of the total UK population. By 2033, 23 percent of the population will be aged over 65 (ONS, 2009). The implications of this might be:

- there is a significant and growing potential audience for your project
- there is potentially more funding available to support work with this group
- there will be others engaging with this group who might be able to support or inform your work

## 6.3 A multitude of generations

The term "over 60s" is not synonymous with "elderly" or "incapacitated"; it covers a huge spectrum of experiences that have shaped people's lives, attitudes and values and this will affect the way you organise your project Think about:

- the different physical and mental abilities within a group
- the advantages and disadvantages of mixing ages/generations/sexes
- the different memories and life experiences within a group

## 6.4 Work and family

Over 60s also includes those who are still in employment. The compulsory retirement age is set at 65 but is likely to increase in the near future and many people are already

continuing to work into their 70s. Moreover, an ageing population means that many people in their 60s and 70s still have dependents, both children and parents. These are factors that might influence how you approach this group:

- some individuals may be sufficiently networked, through work and family, not to wish to take part in the learning opportunities/support you are offering
- the workplace might be a reasonable route for accessing this age group
- you might need to consider the timing and location of any learning activities in the light of employment or family commitments

## 6.5 Definition of "hard to reach"

When you are thinking about your project consider issues of "hard to reach" and how these will be addressed.

### Social exclusion

Those who are socially excluded are hard to reach. Organisations like yours, wanting to plan learning activities, can't access the socially excluded because, for reasons such as homelessness, unemployment or isolation, they are not involved in any of the standard social or cultural institutions you might approach i.e. the workplace, a nursing home etc.

### Restricted freedom of participation

Even if you have been able to make an arrangement to work with a housing association site or a community group (i.e. with those who are not socially excluded), that doesn't necessarily mean that the participants will be easy to reach. There are numerous factors which could restrict their freedom to participate:

- Physical or mental disability
- Language
- Economic disadvantage
- Geographical location
- Economic activity i.e. work
- Education (either a lack of education or a bad previous experience of education)
- Gender

So, when you are thinking about your project consider issues of "hard to reach" and how these will be addressed.

## 6.6 The older adult audience the context of your project

All of the above data and definitions can give you a sense of your audience, but you will need to be more specific if you are to demonstrate that you have really understood your audience and identified their needs.

Find out more about the older adult audience in your geographical area or in the context of your particular sector. For example, there may be very few over 80s in your area; employment may be high and the area generally affluent; the majority of the population might have English as a foreign language.

### The older adult audience in Kent & Medway:

In 2001 (ONS, 2001 Census), 17% of the population of Medway was over 60. Considering general national trends, this was above average for the time and is likely to have grown.

The ethnic makeup of Medway largely mirrors that of the UK as a whole, but with a considerably lower proportion of Black or Black British people living in the area than nationally (ONS, 2001 Census)

Kent & Medway is the most deprived area in the South East and have the highest rate of economic inactivity (1 in 5 of working age population), the highest rate of unemployment and higher than average Job Seekers Allowance (JSA) claims in the South East (ONS, Region in Figures for the South East, 2005)

## 6.7 Mapping current provision

To begin to sow the seeds of an idea for a project, it is important to understand what provision already exists for the audience you have in mind. Some things that you might think about are:

- How are local religious and community organisations engaging with this audience?
- What sort of cultural or other learning activities are provided by the local authority?
- What charities operate in the area and how do they support this audience?
- What are employers and other businesses doing to engage this audience?
- What sort of activities are provided for this group by housing schemes?

- How are other museums and heritage organisations engaging with this audience?
- Which geographical areas or types of people are least well served?
- Are there adult education services offered through a local further education college or university?

It won't be possible to capture all of the information on what is going on in the area, but you can get a good sense of this by:

- Talking to your contacts and networking within the local area
- Talking to umbrella organisations which can give an overview of the activities of a number of groups (i.e. the National Council for Voluntary Organisations [www.ncvo-vol.org.uk/](http://www.ncvo-vol.org.uk/))
- Researching on the internet (local authority websites, tourist guides etc)
- Looking in local newspapers, listening to local radio and visiting the library

When planning SOYH, we concluded that:

- There was no joined-up initiative to support informal heritage learning for adults in Medway in the same way as there was for young people i.e. Our Medway
- There was a wealth of heritage information and expertise available but widely dispersed geographically and over the internet and no concerted effort to bring it together for the benefit of this audience
- There had been no attempt to allow this audience to interpret and disseminate their own heritage, rather than observing or consulting on other's projects
- There were no clear links between learning about heritage and other areas of learning, such as digital technology, communication skills, photography, etc.

## 6.8 Where to find useful data

ONS - [www.statistics.gov.uk/default.asp](http://www.statistics.gov.uk/default.asp)

The Audit Commission area profiles - [www.area-profiles.audit-commission.gov.uk](http://www.area-profiles.audit-commission.gov.uk)

Local council website

Age Concern – [www.ageconcern.org.uk/](http://www.ageconcern.org.uk/)

Department for Communities and Local Government – [www.communities.gov.uk](http://www.communities.gov.uk)

Local Housing Associations – list available from [www.housingcorp.gov.uk](http://www.housingcorp.gov.uk)

College and university prospectuses

### Action Points

- Research your audience
- Identify local and national trends
- Understand what provision already exists



Now you understand a little more about the audience you want to work with, you can start developing the project idea – not the project plan (i.e. how to implement the idea) – but the hard facts of what the idea actually is. The most important rule to remember at this stage is ... be realistic.

## 7.1 Ask yourself two questions?

When formulating the idea for the SOYH project, GEM asked two questions:

- What do hard-to-reach over 60s in Kent & Medway need in terms of informal learning opportunities?
- What is GEM's capacity for supporting and delivering informal learning opportunities?

The answers to these questions helped us to formulate the idea.

Question	Answer
What do hard-to-reach over 60s in Kent & Medway need in terms of informal learning opportunities?	<ul style="list-style-type: none"> <li>• more opportunities to learn</li> <li>• more attractive learning opportunities</li> <li>• more opportunities to explore and better understand their own and/or other people's heritage</li> <li>• wider variety of opportunities to tell others about who they are and what their heritage is</li> </ul>
What is GEM's capacity for supporting and delivering informal learning opportunities?	<ul style="list-style-type: none"> <li>• extensive network of professional heritage contacts</li> <li>• good local heritage network</li> <li>• heritage learning expertise</li> <li>• project management and partnership-building expertise</li> </ul>

## 7.2 The Big Picture

When developing a project idea, it is important to think about the "big picture". What are other organisations doing? What are the big issues and ideas affecting decision-making in this area? This will impact on decisions that you take about who to partner with, where to apply for funding, how to develop the project idea etc.

Some of the major factors influencing the development of SOYH were:

- The high profile of informal adult learning
- Medway and large parts of Kent as regeneration areas
- The role of the council as the major provider of adult learning opportunities and community led services in the area
- The history of Kent and Medway
- National and local government emphasis on community cohesion and identity
- Ageing population

## 7.3 Understanding the parameters

Ideas can easily spiral out of control in our enthusiasm to create high quality, innovative work. So it is worthwhile giving some thought to the limitations and obstacles you are likely to encounter:

- Your own capacity and resources
- Funding requirements
- Evidencing need and available research – do you need to conduct your own research?
- Willingness of partners
- The nature of the audience

## 7.4 Sustainability

Understand from the outset whether this idea and the work that comes out of it can be sustained by you or your partners in the medium to long term. It doesn't have to be sustainable (although if you are applying for funding, sustainability is attractive), but if you don't take the decision about sustainability early on, your project plan will lack clarity. It is also worth bearing in mind that by carrying out a project which is valued by participants you will have built up an expectation that it may continue and you will need to ensure that those expectations are managed. It is best to be clear with participants about whether or not a project is a 'one-off' or will continue.

## 7.5 What does sustainability mean?

Can you or your partners carry on some or part of the project work without the support of additional funding? If you can carry on the work, think carefully about your reasons for doing so and remember that the work should complement your organisation's core mission and objectives if you are going to continue after the project funding has finished. So be realistic, perhaps there are elements of the idea that are sustainable, but not the whole package.

## 7.6 Project legacy

Regardless of whether your project is sustainable you will need to consider its legacy. What will be the enduring benefits of the project once activities have wound up? For example, new relationships, greater skills / knowledge / confidence of project participants, resources etc.

### 7.6.1 Identifying the project legacy

You need to identify the project legacy right at the start of the project. The starting point for this is often “what am I hoping to achieve with this project?” If the funding is to come to a close and you have no intention of seeking further funding you need to have considered what you do next. Do you say the project is finished, close the door and leave it at that? Funders won't like that approach. Alternatively you could take the GEM approach which is to write up your findings and produce toolkits and disseminate them to anyone that would like to consider doing a similar project in the future. At that point you need to consider how you will disseminate the information. It may be that your project legacy is in fact its continuation or development; if so, you should state how you will continue to fund the project, and how you will ensure it is still relevant in the future (evaluation etc)

For useful ideas and advice on developing learning projects, visit [www.inspiringlearningforall.gov.uk](http://www.inspiringlearningforall.gov.uk)

As you begin to get a clearer sense of your project idea, you should think about road testing it with your target audience. Taking the opportunity to consult with people at this early stage will help you to find further evidence to support your idea and/or give you the opportunity to refine it. For more guidance on consulting with your target audience, have a look at the **In Focus - Consulting with the target audience** – at the end of this booklet.

### Action Points

- Answer the question: what is the need and can you meet it?
- Make a note of the opportunities and limitations for your project
- Think about the long term impact of the project
- Understand what provision already exists



Your project needs to be inclusive from the moment of conception and the principles of inclusion need to infuse the strategy as well as the coordination of the project. The term “inclusion” often suggests complicated terminology, policy and practice. We seek to demystify things a little here and hopefully give some simple, practical tips on how to ensure your project is inclusive.

### 8.1 The terminology

**Inclusion** – this is the sense of belonging and support that you wish to promote for all those involved in your project; whether they are participants or partners, employees or stakeholders. In promoting inclusion in your project, you may come across the following terms:

**Diversity** – is an understanding and appreciation that everyone is different for reasons of ethnicity, gender, age, religion, disability, national origin, sexual orientation or simply due to an individual’s unique characteristics and experiences such as job, learning style, educational background etc.

**Equality** – is recognising that everyone, regardless of their differences, has a right to participate and that, as a result of being from a certain background or having had a certain set of experiences, a group or individual might have restricted opportunities to participate.

**Access** – is ensuring that everyone, regardless of physical, mental, social, financial or cultural barriers, is enabled to participate in your project.

### 8.2 Creating an inclusion policy and strategy

#### Policy

At the start of your project, you should create an inclusion policy. It only needs to be a short document – perhaps a side of A4 – that articulates what you understand by inclusion and how you intend to ensure that your project will be inclusive. For an example of an inclusion policy visit:

[www.nmm.ac.uk/upload/pdf/Social\\_Inclusion\\_Policy.pdf](http://www.nmm.ac.uk/upload/pdf/Social_Inclusion_Policy.pdf)

#### Strategy

The inclusion strategy is a longer document and should explore how you are going to turn principles into practice. It needs to recognise areas of project activity where inclusion will require particular attention i.e. recruitment of staff, recruitment of learners, marketing and publicity, transport etc. It needs to explore responsibility for

inclusion and it needs to set reasonable objectives and develop with the project. An example of an inclusion strategy (though in this case it’s called a policy!) is here [www.connecthousing.org.uk/Documents/AboutUs/EqualityDiversityandInclusionPolicy.pdf](http://www.connecthousing.org.uk/Documents/AboutUs/EqualityDiversityandInclusionPolicy.pdf)

#### Consulting on your inclusion policy and strategy

To be truly inclusive you really need to be out in your local community and getting their input into your policy and strategy – not just at the start of the project but throughout. At the outset, you might want to consult with potential project participants and the wider community to produce an equal opportunities needs analysis based on the project proposal. For example, there is likely to be a need for transport assistance, variable timings of learning sessions etc and it is good to have identified these needs during the planning stage.

You might also want to set up a steering committee or inclusion panel (representatives of the different groups involved in and affected by the project) to monitor inclusion throughout the project and to help problem solve as the project progresses. This will help to ensure that equality and diversity is at the heart of the work.

### 8.3 Inclusion in practice

Being truly inclusive of course isn’t ultimately about having a policy or a strategy; it is about being able to ensure inclusiveness on the ground and that means dealing with the peculiarities and whims of people. You will need to have a flexible attitude and approach – ask what will enable people to maximise their enjoyment of an experience; don’t assume you know the answer already. If you adopt a constantly consultative approach, you are more likely to identify potential problems and possible solutions before they get out of control. For example, you may have a wheelchair user in the group. Rather than going ahead and booking a vehicle with a ramp, speak to the individual concerned. They might have an alternative solution – their own mode of transport or they might have a specific type of wheelchair which requires a specific type of vehicle. Have open conversations.

## 8.4 Knowing the law on equality and diversity

This website is useful for familiarising yourself with the law around equal opportunities:

[www.businesslink.gov.uk/bdotg/action/layer?topicId=1074003268](http://www.businesslink.gov.uk/bdotg/action/layer?topicId=1074003268)

[www.acas.org.uk/index.aspx?articleId=818](http://www.acas.org.uk/index.aspx?articleId=818)

### Helpful tools and resources

Very useful document for understanding approaching equality and diversity in terms of project work:

[www.gos.gov.uk/497417/docs/252705/eo\\_guidance\\_projects.pdf](http://www.gos.gov.uk/497417/docs/252705/eo_guidance_projects.pdf)

[www.faculty.londondeanery.ac.uk/e-learning/diversity-equal-opportunities-and-human-rights/what-is-equality-and-diversity](http://www.faculty.londondeanery.ac.uk/e-learning/diversity-equal-opportunities-and-human-rights/what-is-equality-and-diversity)

[www.gem.org.uk/lotc/lotc\\_resources/dev\\_learning\\_services/lotc\\_dev\\_lrn\\_serv\\_menu.html](http://www.gem.org.uk/lotc/lotc_resources/dev_learning_services/lotc_dev_lrn_serv_menu.html)

### Action Points

- Produce an inclusion strategy and policy
- Approach inclusion in an open and honest way
- Know the law on equality and diversity



Often turning an idea into reality is about knowing who has an “interest” in the idea and who can help you deliver the work; often these are one and the same, but it is worth trying to define these groups and individuals.

## 9.1 Stakeholders

### 9.1.1 Identifying stakeholders

A stakeholder is literally, someone who holds a stake or has an “interest” in something; that “something” is in this case your project idea. It is your job, in the early stages of developing a project, to identify who your stakeholders are likely to be. For SOYH, we identified the following stakeholders (next to each group, we have detailed why they might have an interest in the project):

### 9.1.2 How to involve stakeholders

Even though you will have identified your stakeholders early on, you may not choose to involve them in your project until it is underway. You may also need to interact with different groups in different ways. For example, the local press will need press releases and you might not want to contact them until you have an event or a resource to publicise; however you may wish to send an introductory email to housing association managers before the project gets underway as they may develop into potential partners.

Generally-speaking, involving stakeholders is largely about ensuring that they are:

- a) Informed of the project and the ways in which it impacts on them
- b) Invited to participate in relevant ways (i.e. attending events, using resources etc)

Group	Interest/stake
Hard-to-reach over 60s in Kent & Medway	Opportunities to learn, socialise etc.
Local authority	Adult learning opportunities for individuals and communities within their area. Help delivering their own agendas, including the Community Plan. Opportunities for professional development in heritage learning for individuals involved with support for the elderly (e.g. occupational therapists; social workers; care workers)
Heritage organisations in Kent & Medway	Opportunities for partnership which will help to develop relationships with key audiences.
Heritage sector in England	Example of how to work with a particular audience.
Local press	Local, human interest stories.
Charities concerned with over 60s i.e. Age Concern, NIACE	Opportunities for partnership which will help to develop relationships with key audiences. Opportunities for professional development in heritage learning for individuals involved with support for the elderly (e.g. occupational therapists; social workers; care workers)
The wider local community (i.e. community organisations etc)	Information about the heritage and citizens of the local community.
Funders – Department for Business, Innovation and Skills in our case	Help delivering their agenda and also an opportunity to learn lessons for shaping future policy
Service providers such as Housing Associations and Housing Departments	An opportunity to find innovative engagement opportunities for their residents and guests

c) Able to make comments and suggestions that might help the project

## 9.2 Partners

### 9.2.1 Identifying partners

A partner is an individual or organisation which can help you to deliver the project. A partner will probably be a stakeholder as well, as it will be in their interest to help you to deliver the project.

Perhaps those most likely to become partners are those with the greatest “stake” in your project: financial gain; growing visitor numbers or audiences; meeting targets for funding or other bodies; demonstrating corporate social responsibility; meeting organisational aims and objectives. Ultimately, a perfect partnership is one which delivers the original project idea but meets both partners’ needs.

As with stakeholders, you should first create a list of potential partners, so that you have a general idea of where support might be found. Potential SOYH partners were: community/religious groups, Medway Adult and Community Learning Services (MACLS), BBC Radio Kent, heritage organisations in Kent & Medway, housing providers.

### 9.2.2 Approaching partners

You will need to approach partners as early as possible in the planning process. If you are applying for funding, it is best to have confirmed the commitment of your partners (depending on funding) before the application is submitted.

Approaching partners cannot be done with the same blanket coverage, as is sometimes possible with stakeholders (i.e. group emails, notices on websites, articles in newspapers). Although you may have a long list of potential partners, think carefully about which organisations you approach first and what, exactly, you need from them and what you have to offer. Here are some simple steps:

- Research the organisation before you approach them. Learn about their goals and what is important for them from their website, newsletters, or a conversation with someone that knows the organisation
- Articulate clearly what your project is; you will

need to “sell” it to them as an attractive proposition (hence why you should have thought carefully about what might interest them about the project)

- Listen carefully to what their particular circumstances and objectives are
- Have an introductory conversation so that you can both understand the situation, before taking any decisions about taking the partnership forward. This needn’t be a long conversation. You can send more information about your project by email.
- If you are reasonably confident about the potential for partnership, try to secure a face to face meeting.

Have a number of such introductory conversations with several potential partners, before deciding who you wish to approach to establish a more formal arrangement. This will allow you to make informed comparisons and to develop your project idea in the most feasible way.

### 9.2.3 Building relationships

The formality of the relationship you have with your partners will depend on what they are delivering and the level of their contribution to the project. You might decide that it’s best to have a contract in place. Be clear about what you need from them and what they can get out of supporting the project.

Be courteous, keep your partners up to date with project information, even when it doesn’t directly involve them; invite them to celebration events; ask them to help advise on the project (if relevant). Don’t let the relationship fall away after the project has finished. Let them be part of the evaluation and feel real ownership of the project too.

Also remember that the ongoing relationship may not be with the person who you initially have an agreement with. Don’t be put off if you are passed from one person to another. It might not be immediately clear to the potential partner who in their organisation is best placed to take things forward. They may give the relationship maintenance to another colleague or a lower grade member of staff. Know what the delegated authorities are and what events may be likely to influence your partnership (local and general elections, etc).

- If you are interested in working with heritage organisations, have a look at the **In Focus - Developing partnerships in the heritage sector** - at the end of this booklet to find out more about

organisation structures and sector priorities in terms of informal adult learning.

- If you are interested in working with housing associations, have a look at the In Focus - **Developing partnerships in the social housing sector** – at the end of this booklet to find out more about organisation structures and sector priorities in terms of informal adult learning.

### 9.3 SOYH partnership case study

The SOYH project team adopted a partnership model for identifying project participants:

We needed to identify six groups of hard-to-reach over 60s, in a short space of time, to participate in the project. The first thoughts were to advertise in the local press, to put up posters and to distribute flyers in places where the over 60s might visit (doctor surgeries, supermarkets, lunch clubs etc.) However, this approach gave rise to problems:

- What if individuals from a wide variety of places came forward and we ended up with insufficient people in any one area to make up a group?
- Would there be any common bond between individuals who came from disparate backgrounds?
- Was there enough time to form six groups in this way and run four learning sessions per group before the end of March?

The team decided to try and attract over 60s who were already organised into groups. We approached over 60s in social housing via housing associations and local authority social housing departments (social housing in England is made available through private housing associations and local councils; housing associations are regulated by the Housing Corporation, which also funds new affordable housing). By developing partnerships with these organisations, the project team gained access to five groups of learners. The team also approached a residents' association (via a local heritage organisation) and this became the sixth project group.

#### Action Points

- Research and identify potential partners and stakeholders
- Approach potential partners with a clear proposition
- Keep your partners involved and up to speed



# 10 : Creating the project plan

We have looked at identifying and understanding the audience and developing the idea and in particular, the importance of finding evidence to support the demand for the work you intend to do. Now, it's time to get things down on paper. If you are applying for funding, these are some of the areas you will need to cover in your application. But even if you are not applying for funding, you should still try to produce a written project plan as it will help you get a sense of the scale of what you are aiming to achieve.

## 10.1 What is the idea?

Ultimately, you need to be able to clearly articulate the project idea in one or two sentences. But you may not be able to do this straight away. In fact, the process of creating the project plan will probably help you to consolidate your thoughts and find the right wording.

### SOYH – our wording

“The aim of Sounding Out Your Heritage is to enable hard-to-reach over 60s in Kent and Medway to come together in small groups to explore and shout about their personal, local, national and cultural heritage.”

You need to answer the following questions concisely:

- 1) Who are you?
- 2) Who is the project for?
- 2) What will you actually do?
- 3) How will you do it?
- 4) Where will you do it?
- 5) Why is it important and necessary?

Think about including memorable words and the possibility of a name for your project that can be easily abbreviated (we didn't think about this for SOYH and ended up referring to it as SOYA!). It is worth spending some time on this – try lots of different versions out with friends and colleagues. You'll know when you've got it right!

Once you have developed some clear wording to describe your project, you will be able to talk about it confidently when building relationships with partners and stakeholders and applying for funding.

## 10.2 Why are you developing this project?

You and/or your organisation need to explore the reasons why you think your idea is a good one. By being clear about your reasons for developing the project, you can demonstrate your commitment to it. This is really about identifying benefits: to you and your organisation; to the target audience; to your partners and other stakeholders.

### Benefits to the target audience

These benefits are distinct from the “needs” identified in **6 Understanding the older adult audience**. Once you are clear about “what” you are going to deliver, you need to be clear about what the positive impact of this will be on the target audience. Will it help the audience to access more learning opportunities in the future? Will it help the audience to socialise and build positive relationships within the community? Will it help the audience to value their lives and heritage?

We identified the following benefits for the target audience for SOYH:

- Signposting over 60s to learning resources
- Stimulating interest and enjoyment in learning
- Encouraging the able to support the less able to learn
- Producing resources and toolkits that will facilitate independent learning
- Validate this group's lives and contributions - to
- give them a sense of affirmation, provide them with more confidence, build self-esteem, and keep them active in learning.
- Connect people with places and resources so that they can learn flexibly and independently.
- Support learning and discovery about heritage in order to celebrate identities and promote understanding.

### Benefits to you and your organisation

- Don't embark on a project if there are no tangible advantages to you doing so
- Does the project fit with your organisational strategy?
- Does the project help your organisation to grow and develop? (by supporting your core activities, raising your profile; developing new skills etc.)
- Does the project allow you to fill a gap in your current provision? (perhaps by enabling you to work with a different audience)

- Does the project help you to meet the needs of your members/users etc?
- Does the project help you to develop relationships and partnerships that are helpful in the long term?
- Does the project challenge your organisational culture, informing your future strategies?

### Wider benefits

It is worth thinking about how your project will positively impact on the local community, your partners and stakeholders, your sector, informal adult learning, care organisations etc. If you are delivering your project in isolation with no sense of how it fits into the bigger picture, it is unlikely that others will learn from your experience or that the work will be sustainable in the long term.

## 10.3 Identifying outputs and outcomes

### What is the difference between an output and an outcome?

An output is something tangible and measurable produced in the course of the project i.e. a learning session or an evaluation report. An outcome is an intangible benefit, not easily measured, resulting from the work of the project. For example, a greater sense of self worth amongst participants or improved participation rates amongst the target audience. You should identify a series of both outputs and outcomes, when developing your project plan and try to review them regularly at your progress meetings.

### How do you decide what your outputs and outcomes will be?

When deciding the outputs of your project, you need to think through the stages of activity or work involved in your project. Identify what tangible product will come out of each stage of activity. You are seeking to identify products that are for external consumption and that provide lasting evidence of the value of your work. Products produced from the internal workings of your project i.e. job descriptions, employment contracts, internal project reports etc are not outputs.

Deciding the outcomes of your project, should lead on naturally from the thoughts you have had about the benefits of your project. But outcomes are a little more precise and it is worth using SMART (specific, measurable, achievable, realistic and time-specific) to help you clarify them. It can help to provide examples of how you will

achieve your outcomes if you are having difficulty expressing them.

For more information on objective setting and SMART, visit: [www.projectsmart.co.uk/smart-goals.html](http://www.projectsmart.co.uk/smart-goals.html)

## 10.4 Capacity and resources

What can your organisation realistically deliver and what sort of additional support will you need? Answering these questions will inform the way you shape the project idea, it will impose limitations on what you do and it will guide you in understanding what you need from any potential partners.

Key areas to look at when trying to understand what your capacity is for delivering a project:

- Staffing – do you have enough capacity to do the project, or do you need extra help? What can be volunteer tasks and what requires a paid person or specific expertise?
- Finances - finances isn't just about cash in the bank, it is about staff costs, staff time, overheads such as electricity, gas etc.
- Time – do you have the time to manage and deliver this project? Will you have to call on external help to ensure the project can be completed?
- Space – do you have the space for extra staff? If you plan on running learning sessions, will you need to hire venues?
- Location – depending on the project, do you and your staff need to be "on the ground" a lot of the time or can you run the project from a remote location?
- Equipment/resources – how much extra equipment will you need to bring in i.e. computers, printers, desks for running the project **and** resources such as paper, technical equipment etc to run learning sessions
- Expertise – which aspects of your project require specific skills? i.e. marketing, teaching, evaluation?

## 10.5 Researching and refining the idea

Pulling the project plan together may raise a few questions in your mind about how to achieve certain aspects of what you are planning. Now you are beginning to fine tune your project idea, you will be able to identify specific aspects that need to be refined. For example, one of your agreed outputs might be a website providing

information about the history of a particular local area. But now you need to know:

- How much will the website cost to produce?
- How long will it take to produce?
- Where can you find the expertise to design the website? Is there a volunteer in the age group you are targeting or do they have a relation or friend who could help?

Without this information, you won't be able to budget properly or accurately estimate the amount of time and expertise you will require. So have a look on the internet or contact your partners and stakeholders to see what others have done. You will find ideas in others' practice. Alternatively or in addition; you can consult with your target audience, stakeholders and partners to see how they might use such a website or what they would like to see included in such a website.

### 10.6 Identifying and mitigating potential risks to the project

There are risks associated with every project and normally they can be overcome. But you need to think carefully about what they might be at the outset and you need to constantly review them throughout the project. You need to be honest with yourself about the risks so that you can keep control of the project.

Produce a risk log for your project. The risk log could look like this (although at this stage of project planning you will not be able to fill in the Update column):

Risk	Level (low, medium, high)	Mitigating action	Responsibility	Update (date, status)
Winter weather resulting in learners unable to attend sessions.	High	Allow more time in the programme for sessions to take place.	Project manager	1 January 10, snow has led to sessions being postponed

#### Action Points

- Find the words to describe your project
- Explain why and how you are running your project and what you hope to achieve
- Think through the practicalities and risks of delivering your project



You may not be seeking funding for your project, but in case you are, we have provided you with a few tips below. There are a great number of sources of information on pots of money, how to fundraise and how to create a successful application. We don't try and cover all of that here, but instead we have tried to signpost you to other useful sources of information and expertise.

## 11.1 Planning your search for funding

You need to be targeted and tactical about how you identify sources of funding.

1) Think local. If you are running a project within a specific local area, look locally for sources of funding:

- Do an internet search for "funding Kent" (or whatever your local area is).
- Talk to friends and colleagues in the area to get recommendations and a bit of insider information.
- Talk to your local or county authority; many will have a free funding support service for voluntary, community and charitable organisations.
- See if there is a local Council for Voluntary Services, Development Trust or Regeneration Partnership that may have pots of funding for projects.

2) Think about the key features of your project idea. In this case, GEM was planning a project in **Kent & Medway** working with **over-60s** on a **heritage** project which facilitated **adult learning**. Use these key features to plan your search for funding (see below for sources of funding in these areas).

3) Think about organisations which have funded you in the past. If you have a positive track record, they may be willing to fund you again.

4) Think about how your project may help partner organisations fulfil their objectives and therefore enable you to piggyback on their funding. For example by working with mental health services, housing associations' services, training programmes for adult social care workers.

## 11.2 General funding directories and lists

[www.communityfoundations.org.uk/](http://www.communityfoundations.org.uk/) - Channels a range of grants to support local communities. You should have a local branch.

[www.lotteryfunding.org.uk/](http://www.lotteryfunding.org.uk/) - This site allows you to search information on current lottery funding programmes across the UK.

[www.governmentfunding.org.uk/Default.aspx](http://www.governmentfunding.org.uk/Default.aspx) - Search for funding for the voluntary and community sector from 150 Local Authorities using our NEW Local Authority Funder Finder.

[www.fundingcentral.org.uk](http://www.fundingcentral.org.uk) - Funding Central is a free smart website for all third sector organisations, including community groups, providing access to thousands of funding and finance opportunities, plus a wealth of tools and resources supporting organisations to develop sustainable income strategies appropriate to their needs.

[www.grantsnet.co.uk](http://www.grantsnet.co.uk) - Grantsnet is a search engine for grants available to UK organisations.

[www.trustfunding.org.uk](http://www.trustfunding.org.uk) - Trustfunding details all trusts featured in DSC publications including the Directory of Grant-Making Trusts and the Guide to the Major Trusts Volumes 1 & 2. It is updated regularly throughout the year. This is not a free service.

[www.welcomeurope.com/](http://www.welcomeurope.com/) - There are about 500 funds available for EU countries and this website allows you to search the funds to find one that might be appropriate for your project. A lot of European funds designated for the UK are administered through local government organisations and regional development agencies.

[www.ageconcern.org.uk/AgeConcern/grant\\_giving.asp](http://www.ageconcern.org.uk/AgeConcern/grant_giving.asp) - Age Concern England have a limited amount of money to distribute in grants to support work with the elderly. Read the grants manual to find out if your project is eligible.

[www.hlf.org.uk](http://www.hlf.org.uk) - The Heritage Lottery Fund (HLF) sustains and transforms a wide range of heritage through innovative investment in projects with a lasting impact on people and places.

[www.heritagelink.org.uk/fundingdirectory/main/funding\\_home.php](http://www.heritagelink.org.uk/fundingdirectory/main/funding_home.php) - The Heritage Funding Directory is a comprehensive guide to sources of financial support (and more) for anyone seeking to undertake creative projects connected with the UK's heritage.

[www.cloreduffield.org.uk/index.php](http://www.cloreduffield.org.uk/index.php) - Clore Duffield funds projects in education, the arts, museum and gallery education, cultural leadership training, health and social care and enhancing Jewish life, whilst placing a particular emphasis on supporting children, young people and society's more vulnerable individuals.

[www.awardsforall.org.uk/england/](http://www.awardsforall.org.uk/england/) - The Awards for All programme aims to help improve local communities and the lives of people most in need (awards of between £300 and £10,000)

[www.direct.gov.uk/en/HomeAndCommunity/Gettinginvolvedinyourcommunity/Charitiesandcommunitygroups/DG\\_10025966](http://www.direct.gov.uk/en/HomeAndCommunity/Gettinginvolvedinyourcommunity/Charitiesandcommunitygroups/DG_10025966) - Government guidance on accessing funding for voluntary and community organisations.

[www.biglotteryfund.org.uk](http://www.biglotteryfund.org.uk) - BIG money goes to community groups and to projects that improve health, education and the environment.

[www.comfirst.org.uk/funding](http://www.comfirst.org.uk/funding) - Community First's funding advisory service is open to charities, voluntary organisations, community groups and social enterprises. We can help you find grants and maximise your income.

[www.communitybuildersfund.org.uk](http://www.communitybuildersfund.org.uk) - Supports organisations at the heart of your community with finance, training and resources

<sup>60</sup>[www.museumse.org.uk/learning/funding.html](http://www.museumse.org.uk/learning/funding.html) - Guidance on finding funding for museum education

### 11.3 Guidance on writing funding applications and help with fundraising

[www.financehub.org.uk/funding\\_fundamentals/default.aspx](http://www.financehub.org.uk/funding_fundamentals/default.aspx) - lots of advice for fundraising and writing funding applications available on this site

[www.fundingcentral.org.uk/cmsresults.aspx?SEARCH=C&MSTT=CSGRNT,FTYPE=2&MODE=CMS](http://www.fundingcentral.org.uk/cmsresults.aspx?SEARCH=C&MSTT=CSGRNT,FTYPE=2&MODE=CMS) – helpful list of guides on navigating your way through a funding application

[www.acf.org.uk/seekingfunding/index.aspx?id=70](http://www.acf.org.uk/seekingfunding/index.aspx?id=70) – simple guidance on applying for funding

Please note, these are not comprehensive lists, but hopefully they will give you somewhere to start.

#### Action Points

- Plan your search for funding
- Get searching



Whether you are applying for funding or not, you will need to establish a budget for your project (however small). Below we have identified some of the key elements to think about when creating your budget.

## 12.1 Categories of expenditure

The process of drawing up your project plan and setting outcomes and objectives, will have helped you identify areas of expenditure and consequently what you need to budget for. Here are some things to think about.

### Staff costs

- How much permanent staff time are you allocating to this project and how much will that cost?
- Staff costs are not just salary, but can also include the overheads associated with that position i.e. electricity, computer, insurance etc.
- Staff costs also incur on-costs for employers i.e. national insurance, tax etc, which should be factored into the budget as well.

### Freelancer costs

- You can choose to include this in staff costs.
- If you are bringing in temporary, specialist expertise i.e. photographer, teacher, carer – how much will this cost? Do they charge VAT?

### Resources/equipment

- If you are running learning sessions or creating resources, then you will need to provide small scale equipment such as paper, pens etc. How much should you estimate for this?
- Don't forget, that if you are using freelancers to run sessions, you must give them clear guidance on how much they can spend on this sort of equipment.

### Capital expenditure

- You may incur large capital costs as part of the project i.e. buying a video camera or a computer. Include these costs in your budget.

### Travel & subsistence expenses

- You should allow travel expenses for your employees to get to and from learning sessions and meetings (typically setting a rate per mile for petrol usage or insisting on second class travel on public transport).
- You will also incur subsistence expenses for learners during sessions – tea, coffee, biscuits etc.

### Learner support costs

- If you are working with over 60s you should anticipate spending some money on specialist transport, support for those who are visually impaired or deaf or any other sort of staff support or equipment costs to ensure that the learners can fully benefit from the sessions.
- You should also think about venue hire for learning sessions.

### Marketing

- If you are running events or producing publications or leaflets, you need to budget for this.

### Website

- If you are developing a website for your project, again you need to make sure you have thought about the costs in terms of expertise, time and hosting.

### Contingency

- A contingency is a pot of money reserved at the outset for any unforeseen expenditure, perhaps due to the extension of the project or having to re-recruit for staff. Typically a contingency fund is 10% of the total budget.

### 12.2 Periods of expenditure

We will look later in the toolkit at setting milestones for your project. But it is worth saying here that it might be useful to tie in periods of expenditure with your project milestones. Essentially, we are talking about identifying the key stages of your project and in each stage highlighting what will be achieved and how much of the budget will have been spent. For example:

Phase two – March 1 to May 1

Activity	Costs incurred	Expenditure
Run three learning sessions at local museum	<ul style="list-style-type: none"> <li>• Permanent staff time</li> <li>• Freelance staff time</li> <li>• Travel &amp; subsistence</li> <li>• Resources &amp; equipment</li> <li>• Learner support costs travel to museum, specialist materials)</li> </ul>	£4000
Hold PR event for local press	<ul style="list-style-type: none"> <li>• Marketing</li> <li>• Venue hire</li> <li>• Travel &amp; subsistence</li> <li>• Permanent staff time</li> </ul>	£700
Run training event for museum staff re. working with deafblind	<ul style="list-style-type: none"> <li>• Venue hire</li> <li>• Freelance staff time</li> <li>• Travel &amp; subsistence</li> <li>• Permanent staff time</li> </ul>	£1000
	<b>Total expenditure for period:</b>	£5700

If you have funding for your project, you may find that the funder sets the periods of expenditure and will expect you to report on activity and expenditure at the end of each period. Be realistic about what you hope to achieve in each period – if you are significantly over or under-spending on your predicted targets, the funder may well be concerned and ask for further explanation. More importantly, having an idea of your outgoings in advance will help you manage your cash flow accordingly.

### 12.3 Costing things out: finding quotes and supplying evidence

Before you can produce a complete budget, you need to have a reasonable, informed idea of how much things are going to cost. To find that out, you need to get some quotes. Here are some tips:

- Research the market thoroughly and get at least

three quotes for the service or product you require. You want to get an idea of what is offered at the top, middle and bottom end of the market.

- It won't always be the case that the cheapest quote is the best. Getting value for money is as much about the quality of the goods and services as it is about cost. If you are going to need the services of professionals you may need to consider experience, qualifications, and a whole other raft of things. One brand of equipment may appear to

be cheaper than another that provides the same output. However, you may have seen several reviews stating that the cheaper version is likely break down. Value for money is a judgement call and has to be decided on a case by case basis. Just ensure that your justification for why you have chosen a particular item or service is clear and documented and that the process by which it was chosen is fair and transparent.

- If you are applying for funding or have been awarded a grant, make sure you understand any procurement rules attached to the grant.

This may affect your selection of products or services and consequently your budget.

- Always check if a quote includes VAT or not. VAT currently stands at 17.5%. Although some organisations are exempt from paying VAT and some products and services do not carry VAT. It is worth checking [www.hmrc.gov.uk/VAT/index.htm](http://www.hmrc.gov.uk/VAT/index.htm)
- Don't be afraid to have detailed conversations with providers of products and services at this stage – if you think they are offering what you want, begin the negotiation process early on.
- Ask for emailed or written quotes. This will help you in the future and may be required by funders.

Once you have been through this process you should have a much clearer idea of how much your project is going to cost and, crucially, whether or not you can afford to carry out the work. If not, you need to ask yourselves some important questions:

- Where can I get funding? (see previous section)
- Can I ask potential partners to contribute in cash or in kind?
- Can I drop elements of the project in order to make it affordable but still worthwhile?

If you are already applying for funding or have funding in place, you might be interested in the **In Focus - Planning and managing grant income and expenditure** - at the end of this booklet.

#### Action Points

- Work out what you are likely to spend money on
- Make a rough plan of what you are going to spend and when
- Get a realistic idea of what things will cost

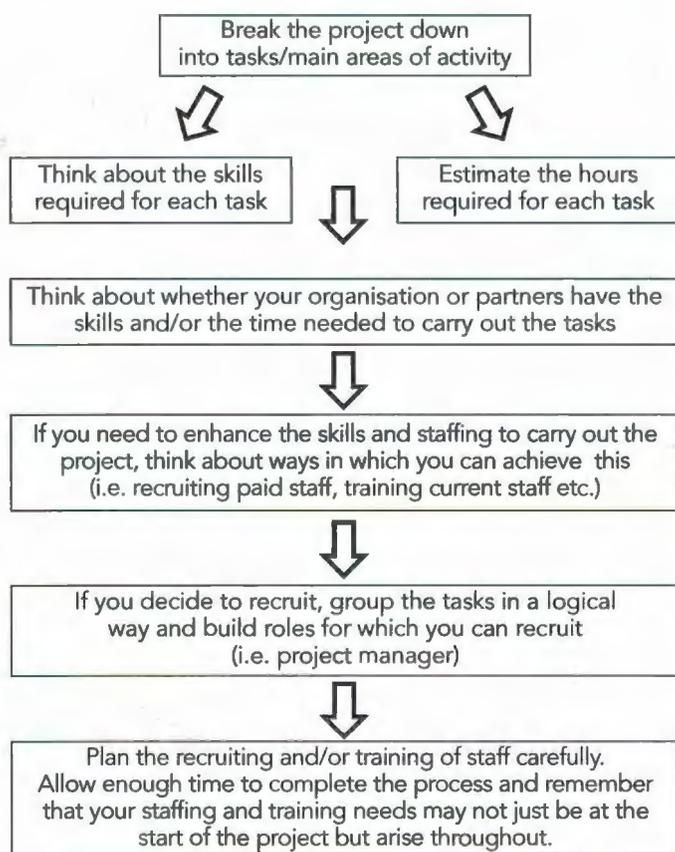


# 13 : Recruitment and staffing

Through the process of creating your project plan, you will be aware of a) what your staffing capacity is in-house and b) what your capacity is to bring in more staff. For small projects, perhaps without funding, recruitment and staffing may not be about bringing in more staff, but about training and developing existing staff to carry out key areas of project activity; or it may be about finding volunteers to help out with the delivery of the project.

## 13.1 Understanding your staffing requirements

Whether your project is big or small, you should take the following steps to work out what your staffing requirements really are:



With the SOYH project, we decided that our staffing requirements were as follows:

- Hire a full-time, project manager to lead and be responsible for the delivery of the project
- Hire a part-time, project coordinator to oversee the day to day administration of the project and support the project manager

- Hire freelancers for running the learning sessions and for elements of the production of the toolkits
- Use GEM staff support to provide supplementary staffing support where necessary.

## 13.2 Skills and experience

The skills and experience required will be distinct for every project, but it is worth noting some important skills and experience required for some of the work carried out in the SOYH project.

Have a look at the job descriptions for **SOYH project coordinator position** and the **SOYH project manager position** in the example documents at the end of this booklet.

## 13.3 Volunteers

If you are operating on a very small or a non-existent budget, then you should think seriously about using volunteers to help out. But simply because you are not paying a volunteer, it does not necessarily mean there is no cost to you and your organisation. Just as with paid staff, you must be prepared to support and develop a volunteer in return for their offer to you of their time and expertise free of charge. If you think carefully about what you can offer a volunteer in terms of opportunity and support in kind, you will put yourself in a much stronger position for attracting high calibre people.

In general the recruitment and selection process for volunteers is the same as for paid staff, but here are some important things to think about:

### Payment

You are not paying your volunteer a wage, but there might be some other form of payment you can offer them e.g. travel and/or subsistence expenses (perhaps you can provide them with lunch)

### Training & development

Think about whether you can provide your volunteer with training opportunities in areas of interest to them. Perhaps there might be the opportunity to shadow someone at your organisation or to give them hands-on experience to develop their CV in a particular area.

### Recruitment and selection

Volunteers come in many shapes and sizes: some will want to volunteer to build their experience and develop their skills so that they can get the right paid job; others

will want to do something charitable and support a good cause; volunteers might be young people looking for work experience or they might be older people looking for company and a way to spend their time; they might be very busy business people expanding their portfolio of interests.....the list goes on. Each, in their own way, can make a valuable contribution to your work, so be open-minded when you recruit and think about flexible working arrangements and multiple volunteers to help make the most of the skills available in the volunteer workforce.

Follow this link for help with volunteer recruitment and management

[www.volunteering.org.uk/resources/goodpracticebank/Corporate+Themes/recruitment/therecruitmentguide-overview.htm](http://www.volunteering.org.uk/resources/goodpracticebank/Corporate+Themes/recruitment/therecruitmentguide-overview.htm)

### 13.4 Recruiting paid project staff

There should be plenty of free advice and guidance available on recruitment and employment in your local library or job centre. If you are searching the internet, the following sites should be helpful:

[www.direct.gov.uk/en/Employment/Employees/EmploymentContractsAndConditions/DG\\_10027905](http://www.direct.gov.uk/en/Employment/Employees/EmploymentContractsAndConditions/DG_10027905)

[www.businesslink.gov.uk/bdotg/action/layer?s=tl&r.lc=en&topicid=1073858787](http://www.businesslink.gov.uk/bdotg/action/layer?s=tl&r.lc=en&topicid=1073858787)

[www.adviceguide.org.uk/index/your\\_money/employment/contracts\\_of\\_employment.htm](http://www.adviceguide.org.uk/index/your_money/employment/contracts_of_employment.htm)

[www.acas.org.uk/index.aspx?articleid=1371](http://www.acas.org.uk/index.aspx?articleid=1371)

However, we have highlighted a few tips when recruiting for your project:

#### The job description

Give some time to creating an attractive job description. If you are offering a salary at the lower end of the range, you might still be able to attract significant talent if the job description is appealing

#### Employment law

Inform yourself about employment law and make sure you are inclusive in every step of the recruitment process including advertising, analysing applications and interview

#### CRB checking

Think about what your requirements will be in terms of staff CRB checking at an early stage in the recruitment process. There is more on CRB checking later in the toolkit see **25 Health, risk and safety**, but it may be

necessary for you to make clear that anyone accepted into this position will have to undergo an enhanced or standard CRB check

#### Advertising

Advertising jobs can cost a lot of money, so think carefully about how to maximise any advertising budget and be tactical about where you advertise; thinking about the sort of skills and experience you are looking for. Remember that if people are working, they will need enough non-work time to research and complete their application. A month is standard for this stage of the process. And provide a time on the deadline date for applications to ensure that there is no confusion.

#### Selection panel

Think about developing a selection panel from a range of backgrounds and with a range of expertise, with experience in recruitment. Once you have a long list of applicants, provide the panel with a selection matrix which details the skills and experience required for the job and ask the panel to score each long list applicant in each category. Using this process, you should be able to come up with an objective short list of applicants to invite for interview.

#### Pay & terms of employment

Do some research into current rates of pay for positions similar to that which you are advertising. If you are recruiting expertise from outside your traditional sector, rates of pay may differ significantly. Rates of pay will certainly differ between the public and private sectors. You clearly need to be competitive, but remember that you can attract applicants on higher rates of pay through your description of the job and through the offer of attractive working arrangements (i.e. part-time, flexible working etc).

### 13.5 Advertising

If you are looking for learning professionals with experience in the heritage sector, you can advertise jobs on:

- [www.gem.org.uk](http://www.gem.org.uk)
- [www.guardianjobs.co.uk](http://www.guardianjobs.co.uk)
- [www.heritagelink.co.uk](http://www.heritagelink.co.uk)
- [www.museumjobs.com/](http://www.museumjobs.com/)
- Or post a job description (free) on GEM JISCmail - [www.jiscmail.ac.uk/lists/gem.html](http://www.jiscmail.ac.uk/lists/gem.html)

If you are looking for project management professionals, particularly with experience in the public sector, you can

advertise jobs on:

- [www.lgjobs.com/](http://www.lgjobs.com/) (if you are a local authority)
- Or visit agencies such as [www.venngroup.com](http://www.venngroup.com) or [www.morganhunt.com](http://www.morganhunt.com) or [www.badenochandclark.com](http://www.badenochandclark.com)

If you are looking for project coordination skills, you can advertise jobs on:

- Low cost or free jobs websites such as [www.charityjob.co.uk](http://www.charityjob.co.uk) or [www.gumtree.co.uk](http://www.gumtree.co.uk) or [www.thirdsector.co.uk](http://www.thirdsector.co.uk) (you can end up inundated with applications, so be as precise as possible when categorising the job and organisation on the website)
- Or visit local recruitment agencies

For all jobs, try to combine targeted advertising with a more general approach. Some suggestions:

- Local paper (they may advertise jobs in print or on their website)
- Your networks and internally (if you are a large organisation)
- Local job centre

### Action Points

- Work out your recruiting and training needs
- Think seriously and sensibly about recruiting volunteers
- Put time and effort into recruitment and training



By working through the project idea, identifying key tasks and understanding your staffing requirements you will have sorted out the day to day running and delivery of the project – i.e. who is going to do the work and how they are going to do it. But you also need to think carefully about how the project is going to be managed.

## 14.1 The management structure

There are two key areas in which strong management is crucial for a project:

- Responsibility for ensuring that the work is delivered on time, on budget and to the desired standard
- Responsibility for the strategic direction of the project (i.e. responding to stakeholders, policy developments etc)

### Project management

The first of these responsibilities is typically taken on by the project manager or project director and it may be that in the case of very small projects, the project manager or director is responsible for the coordination and delivery of the work as well.

### The advisory group

The second of these responsibilities should really be taken on by an advisory group under the supervision of the project management. An advisory group is a small group of experienced individuals who meet at regular intervals to review and guide project activity. Regardless of the size of your project, you should think seriously about recruiting an advisory group. Often members of an advisory group will give their time voluntarily, so should not cost you much or indeed anything in the way of additional resources and they provide crucial, objective advice on taking the project forward.

Here are some tips on creating and managing an advisory group:

- Produce some “terms of reference” for your advisory group. This will help to clarify the role of the group and avoid any confusion. Have a look at the example document **SOYH Advisory Group Terms of Reference** at the end of this booklet.
- Think about your stakeholders when trying to identify members of the advisory group. By including representatives of key stakeholder groups on your advisory group, you increase your chances of meeting their needs and consequently the objectives of your project.
- Report formally to your advisory group, by

producing reports on progress, agendas of items for discussion etc. Your advisory group might meet four times during the course of your project and these meetings will therefore form focal points for ensuring work is completed and the project team are fully aware of what needs to be achieved next.

## 14.2 Monitoring outputs and record keeping

It is really important that all members of the project team are aware of what has to be done, who has to do it and when it has to be done by. Again, establishing your staffing requirements will have helped you to get started on this process, but it is important to be as thorough as possible so that you can manage everybody’s time efficiently.

### Product breakdown schedules

The product breakdown schedule is a very useful tool. The product breakdown schedule contains the following information about your project:

- The product or output to be created as a result of a particular task (i.e. the programme for an event produced as a result of having found a venue, identified keynote speakers, confirmed a date etc.)
- The size and type of the product or output (i.e. one A4 page, three CD or DVD toolkits etc)
- The proposed completion date and actual completion date for delivery of the product or output
- The name of the person responsible for ensuring the product or output is delivered

Product breakdown schedules can be produced to varying degrees of complexity, but fundamentally they allow the project manager to review progress on the project and they give project staff a clear idea of their workload and deadlines. The product breakdown schedule should be updated on a weekly basis and reviewed with all project staff.

### Record keeping

Keeping good records is essential for the following reasons:

- You can demonstrate the outputs of your project activity (what you have achieved)
- You can show income and expenditure associated with project activity
- You can provide evidence of action should a dispute or disagreement occur.

*What sort of records should I keep?*

Everyone has their own way of working. You may prefer to store things electronically or in a paper file. You may wish to keep every document or just a few. But here are some tips for the types of records you may need to refer to further down the line:

- The major outputs or products of your project activity (i.e. those detailed on your product breakdown schedule). Some of the products from the SOYH project were: the learner registration form; the session evaluation form; the press release for the project etc.
- All financial and legal records associated with the project (i.e. pay slips, signed contracts, CRB checks, emails accepting quotes or confirming arrangements etc.) In the case of larger organisations, this is particularly important as financial records can often get swept up by central accounting departments and evidencing income and expenditure when the project is audited then becomes a more time-consuming process.
- All correspondence and agreements with the funder (if relevant)
- Timesheets recording staff and freelancer time by hour

Remember that you may not be the only person who needs access to these documents. Make sure they are accessible to all project staff and that they are backed up in case of any technical problems.

**Monitoring systems: creating and monitoring against milestones**

You might find it useful to create milestones for the project and indeed many funders will require you to do so or set them for you. These are higher level than the product breakdown schedule. You might have three or four milestones established at certain dates during the course of your project: perhaps to coincide with the advisory group meetings. These milestone dates require you to assess progress against your stated project objectives.

Setting milestones allows for a more qualitative evaluation of progress. You can assess the following between each milestone (i.e. 2 January to 2 March):

- What activities have been carried out in relation to each objective
- Who has been responsible for those activities
- When these activities have occurred
- What resources have been used to support those activities
- How much money has been spent on those activities
- What products/outputs evidence those activities
- An objective evaluation of the success of those activities

Your funder may require you to set and report against milestones such as these. But even if they don't, it is a useful way of getting a sense of how the project is going. The main thing to remember at the outset is not to set yourself unachievable targets. Be realistic about what you can deliver in a given time frame and also be honest when reporting against milestones.

**14.3 Internal reporting**

Internal reporting is about making sure that everyone involved in the project is kept up to date with progress; particularly the project manager. You need to establish clear reporting lines – who reports what to whom – and reporting dates. For example, it might be best to review the product breakdown schedule every Friday or every Monday – you might need to change dates of delivery in the event of unforeseen circumstances, but it is important that everyone knows what changes have been made. Aside from this more formal reporting, you also need to make sure that any project staff feel free to report problems or ask for advice when they need to. An open reporting arrangement is important in making everyone feel valued and clear about their objectives.

**14.4 External reporting**

If your project is being funded externally, you will no doubt be required to produce interim and final project reports and the parameters and content of these reports will be defined by the funder. But even if you are funding the project internally, you should try and establish an equivalent, formal reporting process – perhaps to your advisory group. The following information is important when reporting externally:

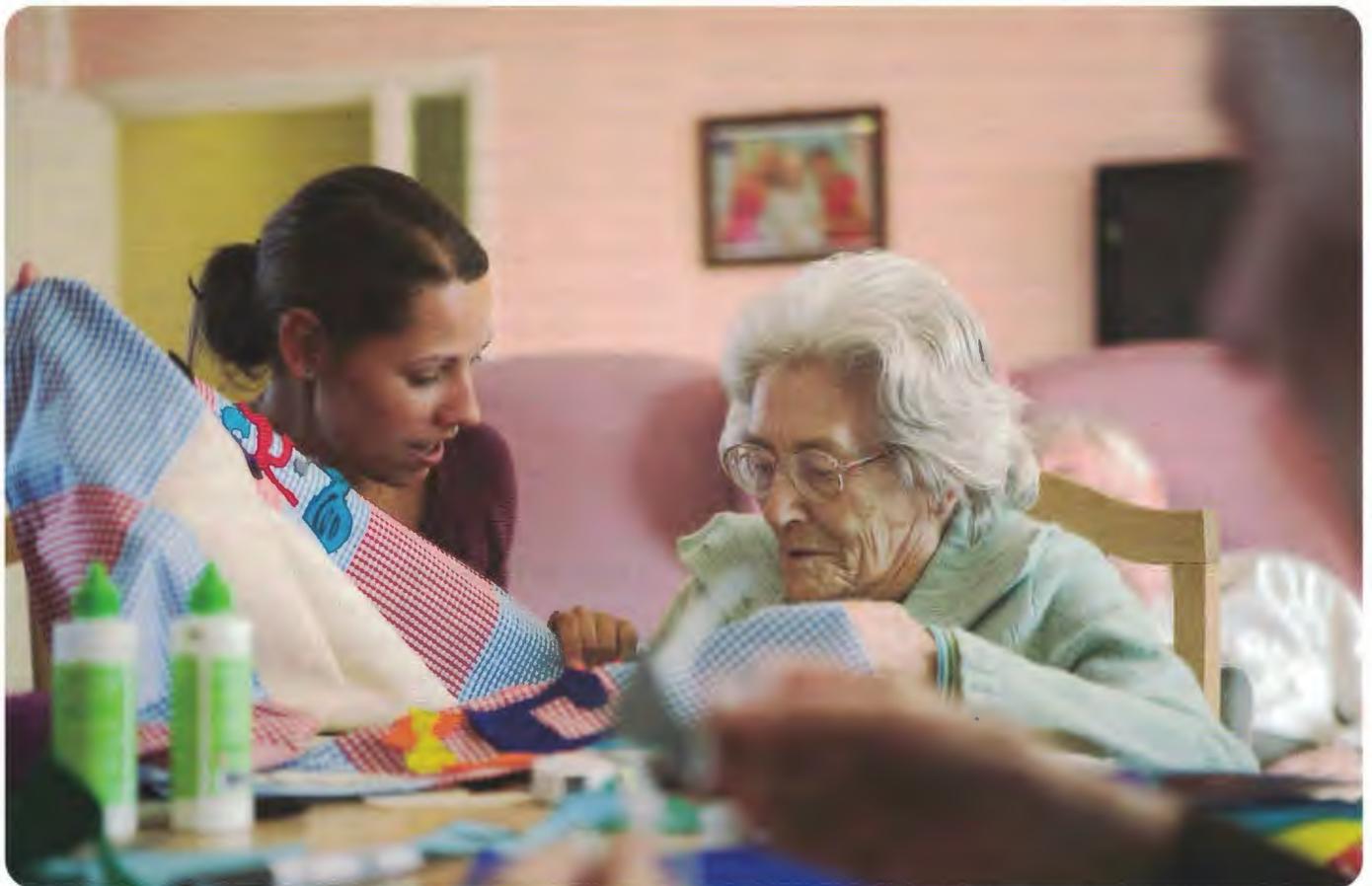
- How much money has been spent and how much money remains to be spent
- What outputs have been delivered
- Progress against intended outcomes/objectives

- Any problems arising or potential risks

Try to develop a regular relationship with a named person in your funding body to avoid misunderstandings, to get quick advice, and to give them a sense of ownership in the project as well. They should be invited to all social and celebratory events and kept informed of press coverage and other success.

**Action Points**

- Establish a strong management structure
- Keep good quality, thorough records
- Be open, honest and disciplined about monitoring and reporting on the project



# 15 : Evaluation

Every project needs evaluating, no matter how small. Evaluation helps you to understand how successful your project has been. Establishing what and how you will evaluate should form part of the planning process for your project. Here some tips for getting started:

## 15.1 What are you evaluating?

- Delivery against outcomes and outputs
- The model and processes of project delivery

## 15.2 Identify your outcomes and outputs

You should have established your project outcomes and outputs during the creation of your project plan - see **10 Creating the project plan**. These will be high level outcomes and outputs and ultimately will be the measures of your success. For projects and activities involving learning, the Inspiring Learning for All framework is a good place to start when trying to identify measurable outcomes for your work – [www.inspiringlearningforall.gov.uk](http://www.inspiringlearningforall.gov.uk).

Depending on the size of your project, you will probably also need to identify outcomes (and outputs) for different elements of your work. For example, you will need to establish learning outcomes for individuals, individual sessions and for a series of sessions. These should be connected in some way to your high-level outcomes so that you can easily process and analyse evaluation data from different parts of the project against the overall project objectives.

### Example:

Project outcome/output: to improve the ability of hard-to-reach over 60s in the local area to access heritage learning resources

Session series outcome (for very frail group in nursing accommodation): to develop the ability of participants to use the internet to explore heritage

Session outcome (for the same group): to introduce and build familiarity with two key heritage websites

## 15.3 Collecting baseline data

Importantly, you need to establish what the initial situation is before you can begin to measure how much you have improved it. This will have formed part of the initial stages of the project planning – see **6 Understanding the older adult audience**. Ideally you

need clear, reliable statistics with which you can draw reasonable comparisons at the end of the evaluation process.

## 15.4 Data types

You will need to collect a mix of quantitative and qualitative data to get a balanced and contextualised sense of the project. Quantitative data are the numbers: how many participants were there; how many participants came to every session: what percentage of participants felt that the sessions were “excellent”, “alright”, “poor” etc. Qualitative data are the thoughts, comments, opinions etc. gathered through evaluation. They are of course subjective, but if they are collected in a neutral/unbiased way, they can be useful in painting a more subtle picture of the project.

## 15.5 Evaluation methods

You can use a variety of methods to evaluate a project and in fact a mix of two or more methods is advisable. The methods you choose will vary according to the data you require (i.e. qualitative or quantitative), the type of audience (i.e. project staff, participants etc) and the ability of the audience (i.e. those with hearing or visual impairments etc). Here is an example of the range of methods you might use:

- Interviews with project staff
- Comments books or walls for partners/participants /families etc at a celebration event
- Feedback forms to be filled in by participants (or by the carers of those who are too frail)
- Feedback discussion groups with participants

## 15.6 Reviewing the data

If at all possible, you should try and structure your evaluation so that you collect comparable data which is easy to manage. This will help you when it comes to the analysis stage. Of course it won't always be possible to directly compare data, because you will be asking for subtly different information from each evaluation. Inputting evaluation data into a database or Excel spreadsheet is a useful way of storing data and putting it into a format that can be used flexibly. You may need to have a database for each part of the evaluation.

## 15.7 The report

The evaluation report is an opportunity for you to explain your findings from the evaluation process. You should

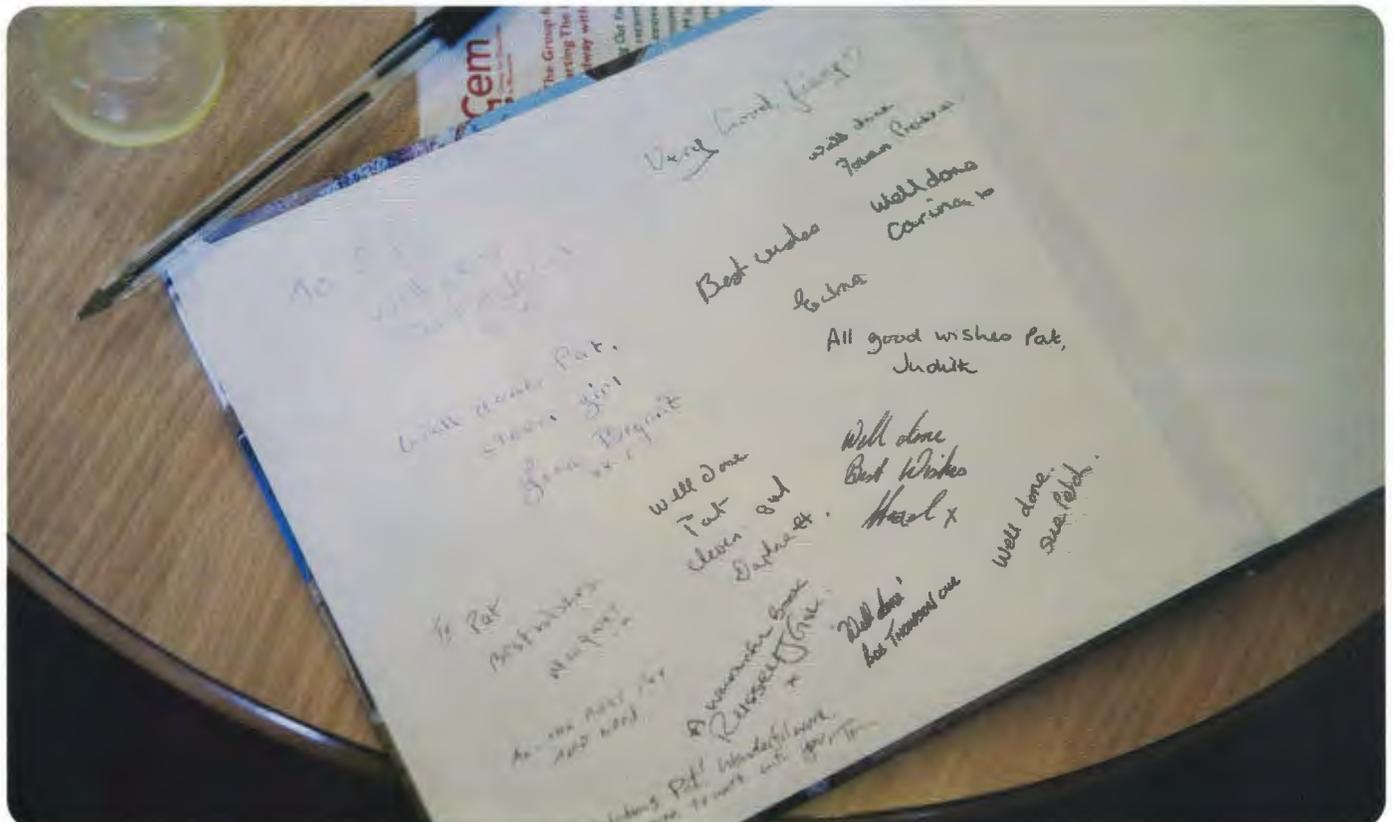
include relevant data in an easy to read format i.e. a table or graph or a quote from a participant. You should state your evaluation methods, numbers participating in the evaluation versus overall numbers and any anomalies in the process which might skew findings. You should avoid drawing conclusions or hypothesising unless you can offer clear evidence to support your claims. You should link your findings to your intended outcomes and outputs and explain clearly whether or not you have achieved against these. You should use your evaluation findings to identify ways in which the work can be carried forward and/or modified. Try to bring your project alive for the reader by including photographs and quotes. You are trying to inspire as well as inform.

**Action Points**

- Establish outcomes and outputs against which to evaluate
- Use a variety of evaluation methods so that you can collect a range of data
- Produce a report which inspires as well as informs

The report and your findings can be used to generate more funding and to promote the work of your organisation. They should form part of any dissemination activity at the end of the project.

For a short, practical introduction to evaluation, read Evaluation, feedback and review at [www.gem.org.uk/lotc/lotc\\_resources/dev\\_learning\\_services/lotc\\_dev\\_lrn\\_serv\\_menu.html](http://www.gem.org.uk/lotc/lotc_resources/dev_learning_services/lotc_dev_lrn_serv_menu.html)



# 16 : Recruiting participants

So, you have done the planning, you have the staff, you've built the partnerships...now you have to start making things happen. First and foremost, you have to identify and inspire people to participate in the sessions or activities you are offering. Even if you have direct access to potential participants i.e. through a housing manager or as a community group leader, you still need to ensure that the participants are genuinely interested in the opportunity and participating out of choice.

## 16.1 Marketing to over 60s

The marketing information that you create for potential partners, the press and other professionals is likely to be very different from the materials you produce for the beneficiaries. More than simply telling this audience about your project, you want to encourage them to participate. Consider:

- What are the different types of media that over 60s might access? – public notices (i.e. in the library or local shop), local newspaper, local radio or television
- How technologically able are they? – do they use the internet or email?
- Are they likely to have any disabilities (i.e. blindness, deafness.) that might prevent them from accessing the materials that you create?
- How do you reach those who are housebound? – fliers through the door, word of mouth via social services, meals on wheels
- Think about the language that you will use. Will some words be off-putting? For example is it possible that words like 'heritage' and 'culture' might conjure up images of dusty castles, or the ballet, rather than a fun community led project?

## 16.2 A cohesive group

If you haven't yet identified how to access the participants you wish to work with, a good starting point is to approach individuals with a common bond. This will give you a good platform on which to build and will make it easier to find common interests and learning goals going forward. For example, you could approach:

- A nursing home or secure housing facility
- A faith group
- Residents of a particular street or area
- A special interest group
- An employer

Remember, when it comes to actually running sessions or activities, you shouldn't focus on the group's common

bond at the expense of all else. People will have lives and interests beyond the group. For example, residents of a nursing home may come from all over the country and from a range of different backgrounds.

## 16.3 Generating interest

Alternatively, you may have identified a group of individuals to work with but it isn't always the case that they are committed to or even interested in participating in the activities you are offering. You will need to do some work generating their interest.

### Coffee mornings

A good way of stimulating interest and enthusiasm is by visiting the group informally, perhaps during a coffee morning, introducing yourself and telling them a little bit about the project. Remember this initial contact isn't a hard-sell! This is about starting to build a relationship with the participants and identifying how and why they might like to become involved in your project. Sell the positive aspects such as the fun they will have and how it is about them and their stories.

### Posters

Posters and leaflets are a good way of maintaining a presence for your project between or before sessions. For the SOYH project, GEM produced A4 informational notices (posters) to be hung on notice boards and A5 leaflets, which included additional information on the back about GEM and the SOYH project. Posters and leaflets should be simple and visually interesting and clearly define the purpose of the session. GEM used seasonally appropriate clipart and wording to generate curiosity. Have a look at the example documents of a **poster** and a **leaflet** from the SOYH project at the end of this booklet.

### Housing staff

If you are working in partnership with a housing provider, establishing strong working relationships with housing managers is worthwhile when trying to encourage participation. You should try to create a set of guidelines at the start of the working relationship: outlining each partner's responsibilities; identifying main contacts; dates/times/locations for sessions; posters/leaflets for distribution; expectations and timeframe of the project. The positive relationships created with housing staff through the SOYH project meant that they were happy to print and distribute posters and fliers for the sessions and encouraged discussion about the project in between sessions.

## 16.4 Communicating the idea

The way you talk about your project to partners and funders, isn't necessarily the way you should be communicating with your potential participants. If you are working with an over-60s age group, you need to remember that they are likely to have been out of a learning (and possibly a work) environment for a number of years. The language of teaching and learning will have changed or become alien to some people; as will the structure and discipline and inspiration and enjoyment that comes with it.

Through the SOYH project we found that describing the learning process, talking about the acquisition of skills and the opportunities for discovering heritage generated only moderate interest and enthusiasm. What focused the attention of participants was the production of a resource – the ultimate goal of creating something tangible. By focusing on the end product, facilitators were able to put the sessions into context and help participants understand their purpose i.e. researching material to go into the resource, practising techniques to create the resource etc.

Emphasising products rather than processes in the way you communicate with older participants can stimulate engagement and open people up to the implicit and explicit opportunities to learn through participation.

## 16.5 Registration

Asking participants to register to participate in the project is important. It will allow you to monitor participation levels, pick up valuable information about the participants and get necessary permissions for image reproduction and data protection etc. The best way to register participants is by using a registration form to capture all of the required information. Here are some tips on registration:

- Do not make the form too long or complicated. Only ask for what you really need to know
- Do make sure that all forms are available in print that is large enough for those with some visual impairment to read
- Ensure that staff are able to help those who are unable to complete the forms themselves
- Don't expect to have all the registration forms filled in before the sessions start – those interested in participating could vary from week to week.

Have a look at the **SOYH registration form** in the example documents at the end of this booklet.

## 16.6 Participation

Earlier in the toolkit we talked about "restricted freedom of participation" being another dimension to the term "hard-to-reach" (see 6 Understanding the older adult audience). Once you have identified the groups you wish to work with you may find that the members of that group remain "hard-to-reach". The reasons might include:

- Depression and lack of motivation
- Bad experiences of education resulting in poor expectations of learning
- Poor numeracy and literacy levels creating a barrier to other forms of learning
- A lack of confidence and self-esteem
- Physical disability making it difficult for individuals to leave their home or room
- Health problems (physical and/or mental)
- Gender
  - Isolation caused through little contact with others, such as friends, family or professionals
- Social and economic status

Spending time identifying these factors will be worthwhile, because then you will be able to start looking at ways to overcome these barriers.

## 16.7 Size of group

The size of the group you work with will probably only partially be within your control. If a large number of people are interested in participating, you could think about dividing the group in two or suggesting a learning programme that could work with a larger group. Large groups take a lot of staff resources and can become fragmented, making the sessions difficult to manage. On the other hand, too small and you will not have the group interaction that will stimulate the sessions to become creative and exciting for the participants. Ten to 12 learners for each group was an ideal number for the SOYH project.

## 16.8 Variations in numbers and participants

Expect the unexpected. Word of mouth can be a powerful tool, and if your learners have had a fun first session you may turn up for the second session expecting 10 learners, only to find you have 14 or 15. But you should also expect some drop-outs. Not everyone will

be able to attend each session. Some may have prior engagements, others may decide that they do not like the sessions or might be unwell. You may equally have some learners who dislike other learners sufficiently to not want to attend, particularly if you have one individual who insists on taking centre stage all of the time.

Some of these eventualities you can plan for and deal with, such as the limelight lover! With good management the influence and impact of such individuals can be diminished. It is also possible to manage the known non-attendance of learners, by ensuring that information is sent to them, or if they are late that they are able to easily join in an activity. However, the unknown factors such as drop-outs and non-attendance, or increased numbers, will need a contingency plan.

**Action Points**

- Work with partners or market strategically to recruit participants
- Generate interest and enthusiasm to encourage participation that is meaningful & deliberate
- Plan for varying numbers of participants and barriers to engagement
- Understand what provision already exists



The first one or two sessions are crucial in setting the tone for the project. Balance is what you are after: between structure, focus and planning on the one hand and flexibility, participation and learner autonomy on the other.

## 17.1 Preparation

Try to find out as much information as you can about the group and their circumstances prior to running the first session. You will have made a start on this if you have attended a coffee morning (see **16 Recruiting participants**). If you are working with a sheltered housing scheme or nursing home, try and meet the manager before setting up the first session. He/she will be able to give you an insight into the specific nature of the group relating to access, personalities etc. Some areas you might want to cover are:

- Refreshments for the sessions – Who will be providing the refreshments? Will you be expected to make the tea and distribute it? Who will clear away the cups and saucers and wash up?
- Do any residents have particular mental/physical health issues to consider? Are there medication times to be aware of?
- What are the likely interruptions or distractions, particularly if the lounge that you are to use is in an open plan area?
- Are there any planned works (painters, boiler servicing engineers needing access to the space etc) or a regular alarm test that might interrupt the flow of the session?
- Which days are best for the scheme and the staff (there may not be any events on a particular day, but staff may be engaged in meetings)?
- What are the personalities of the participants? Are there any particularly dominant or shy individuals?

You need to know as much as possible about the participants in order to understand the skills and staffing levels needed to work with them. For example, some people suffering from mental health problems might demonstrate violent behaviour and you will need to know how to manage this behaviour and still deliver an enjoyable session for participants. We would recommend asking any housing manager to formally indicate any particular issues in this regard, before the sessions go ahead. You could ask housing managers or group leaders to sign a form declaring any physical or mental health

issues and agreeing to provide or guide you on the required support for any individuals concerned. Please see **25 Health, risk and safety** for more information on risk assessment.

## 17.2 The taster session

The taster session is a good chance for the session facilitator and potential participants to get to know each other. But it is primarily important as an opportunity for participants to experience learning through and about heritage so that they have sufficient knowledge and understanding to decide how and what they want to learn in future sessions. The taster session needs to be fun and engaging, but also well organised and structured. It will set the tone for the following sessions. Here are some tips on running a taster session:

- Introductions – allow time at the beginning for the facilitator and participants to introduce themselves
- Introduce the project
- Provide some short, 20 minute taster activities, which provide participants with an opportunity to explore a range of heritage learning activities and give them the chance to decide which interests them the most (this will become the focus of the remaining sessions). Activities might be: reminiscence through handling objects, listening to music or tasting favourite traditional dishes. By offering multiple and diverse experiences that engage the group with heritage, they will hopefully begin to see that heritage can be linked to all sorts of interests and activities. Participants should be encouraged to see heritage as more than looking back to one's past, but also to one's traditions or interests. This allows heritage learning opportunities to encompass cooking, music, dance, art making, etc.
- Finish the session with an opportunity for informal feedback; encouraging participants to discuss what they liked or didn't like about the activities and to think about how they would like to take their learning forward.
- Agree on the best day, time and location for future sessions.

## 17.3 Deciding on the resource

You may find that participants decide on the shape that their sessions will take and the resource they wish to

create at the end of the taster session. Some groups may need another session to explore various aspects of heritage; in which case session one will be very similar to the taster session allowing opportunity for exploration and reflection. However, it is advisable that participants determine the direction of their project by the end of session one.

SOYH set out to be a learner-driven project – working on the basis that people are more likely to value and continue their learning if they have been actively involved in shaping its course and content. Consequently we wanted participants to decide which aspect of heritage they were interested in exploring and what sort of resource they would like to produce. Working with a group, rather than individuals, means that there is a process of negotiation and collaboration to go through to ensure that every individual feels involved in directing the learning. When a group has varied interests, personal histories, skills and ability levels, this process can be difficult. As the facilitator, you need to think about the following:

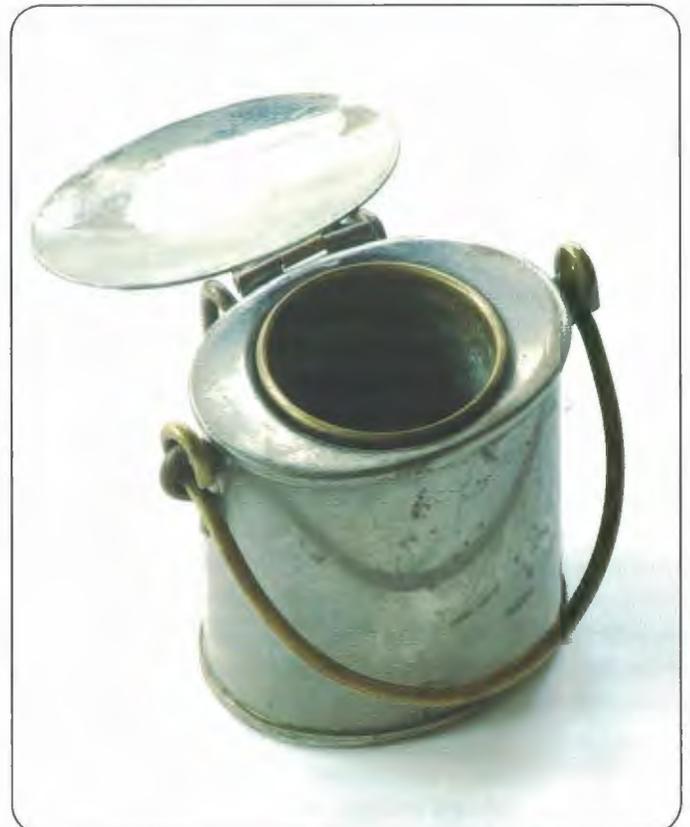
- Be as impartial as possible Identify and highlight common interests
- Suggest various ideas (ie. memory box, audio recordings, art making, bookmaking, photography)
- Allow time for discussion – giving everyone a chance to contribute
- Encourage the learners to be open to change and stepping out of their comfort zone
- Assure learners that they will be supported (through experts and resources)

It is important that you are clear with participants about the constraints of the project: timeline, budget and the capabilities of participants. Some of the ideas suggested may have brilliant learning goals, but be a bit too extravagant for the budget. While not dismissing these ideas outright, you should suggest something more simplistic for the project that will help learners achieve their goals. Alternatively, if you are working with participants who have memory problems, you should steer the group away from reminiscence projects and make other suggestions such as doing something more creative or artistically expressive. Selecting an overcomplicated project or one that is beyond the abilities of participants may create a sense of frustration and stress within the group instead of a fun and engaging environment.

Some groups may want to hold a vote to decide how to progress the project; others may come to a decision through discussion. In some cases, particularly if you have a large group (12 or more participants), it may be impossible to come to an agreement; in which case you should consider splitting the group, although this will also mean splitting the budget and resources and this should be made clear to all involved.

### Action Points

- Find out as much as you can about the participants and the setting for the sessions
- Run a fun and focused “taster” session to stimulate ideas and engagement
- Support participants in selecting a resource that they are all happy with



The NIACE report *Enhancing Informal Adult Learning for Older People in Care Settings (A guide for Care Managers)* says the following about engaging older people in learning activities:

“Practice has shown that offering opportunities consistently and without pressure gradually builds interest”.

This is certainly the experience of the SOYH project. The SOYH project budgeted time to deliver four sessions of two hours each. We actually delivered closer to six sessions of two hours each over a period of two to three months. But there remained pressures on time and concerns to ensure that the learning experience was as beneficial as possible for participants.

When you are planning your project, build in a significant amount of time (more than you might envisage) for the delivery of learning sessions. Aside from those sessions missed for various unavoidable reasons, the sessions you do deliver will take time to have an effect and to become meaningful and enjoyable learning experiences for those involved.



## 18.1 The group learning plan

You need to draw up a learning plan for each group covering all of their sessions. Your learning plan should include the following:

Area	Detail
Timetabling	When will the sessions be taking place? How many sessions will there be?
Locations for learning	Where will the sessions take place? Do the locations need to be accessible?
Transport requirements	Do learners need transport? Do you need to subsidise learner transport? Are there particular transport needs?
Access requirements	Do learners require translation support, hearing loops, Braille documents etc?
Equipment & resources	What basic resources do the groups need? i.e. paper, pens etc Are there any substantial equipment needs? i.e. laptops, cameras etc.
Staffing	What freelance/expert support is needed? How much project staff time will be spent on learning sessions? What sort of support is available from volunteers? Can housing staff provide support?
Marketing	How will you advertise the sessions? When will you advertise the sessions?
Evaluation	How will gather learner's personal learning goals? How will you measure learning goals?
Next steps	Will there be an event to celebrate the end of the learning sessions and what has been achieved? Will the resource be hosted any where?

By going through this process, you will begin to identify what needs to be done and when in order to ensure the success of the sessions.

## 18.2 The lesson plan

A lesson plan should be prepared for each session. The lesson plan should include:

**Date, time, location of the session and Number of participants** as well as:

### Overall learner objectives/outcomes

These will probably be consistent for each learner from session to session and will have been established in the first session and perhaps recorded on the registration form.

### Learners' starting point

At the point that you write the lesson plan you may already have the registration forms completed. These will provide you with most of the information that you need to gain an understanding of where your learners are starting from. If not the information gained from the scheme manager and your own observations will help with this. Include:

- Disabilities that you might need to be aware of
- Whether learners are already engaged in other types of activities and clubs
- Whether they have any experience or prior interest in heritage and heritage learning.

This will be a good guide for setting your session goals.

### Session goals

The session goals should identify what you would like to have achieved at the end of the session, bearing in mind the learner objectives and the learner's starting point; for example, to have recorded three participant stories or to have involved all session participants in handling unfamiliar historical objects. This will help you to map your progress, and if you don't achieve all that you have set out to accomplish, you can then look at what went wrong and how you might adapt your plan for the next session.

### Session activities

Having worked out your session goals, you can identify the activities which will help you to achieve these goals. Do not try to achieve too much in one session as it will create pressure on project staff and the learners. Think about how you will introduce the topic (pictures, objects, sounds, smells, a film or a story etc). Think about what you want your learners to do. Perhaps introduce the topic with an activity that stimulates their own stories and discussions. Ensure that each activity is closely related to

the last so as to avoid confusion. Avoid introducing too many topics in one session.

Have a look at the **In Focus - Heritage learning activities** at the end of this booklet.

### Equipment and resources

List any equipment, materials, staff, freelancers and volunteers that you need and ensure that you have noted any dates by which anything needs to be ordered.

### Timing

Plan out, with timings, how you expect the session to progress. This will help you to avoid any overruns, or problems with completing activities.

### Evaluation

Reserve a section on your lesson plan for evaluating the session and identifying issues to consider when planning the next session.

End each session with a few minutes recapping on what has been achieved. Use this time to discuss the next session and give the learners the opportunity to give their opinions as to what they will do and achieve in the next session. Summarise this, as this will form the basis of the learner outcomes for the next lesson plan.

### Action Points

- Allow enough time to plan and run the learning sessions
- Identify the practical implications of the group's sessions by preparing a group learning plan
- Prepare lesson plans which set realistic goals re. developing and engaging participants

The groups involved in the SOYH project pursued a number of different learning interests and GEM did not have the capacity or expertise in house to support all aspects of their learning. In these instances, GEM recruited freelance experts to help run the sessions and produce the resources. Bringing in freelance expertise can be expensive, but with careful management and budgeting it can bring a fresh perspective and energy to the project.

## 19.1 Identifying the support you require

You will probably not be in a position to know whether or not you need freelance support until you have run at least one session with a group. Participants will need time to explore aspects of heritage that interest them and, in the case of SOYH, ideas for resources that they would be interested in producing. The project management will need time to plan what will be involved in supporting the group once they have decided what to do. Here are some of the factors you need to consider when thinking about freelance support:

- The abilities of the group of participants (how much can they achieve independently? and if they do need additional support, how much time will be required of the freelancer?)
- The nature of the group of participants (will a freelancer need particular experience of working with Alheimers' sufferers or stroke victims?)
- The agreed aspect of heritage to be explored (will the freelancer need expertise in this aspect of heritage or is this being provided by the participants and partner organisations i.e. museum?)
- The resource to be produced by the group (can you support the production of this resource in house or not?)
- The emphasis to be placed on skills development in the learning sessions (if a freelancer is to be supporting skills development, rather than simply producing a resource, then they will need to have expertise in facilitating learning)

You will need to be clear about the skills you require of the freelancer, the amount of time they will need to commit and the elements of work they will be required to carry out. Of course, you will also need to know how much you are prepared to pay them, but we will cover this in more detail below.

## 19.2 Finding a freelancer

The heritage sector employs freelancers in a range of capacities and particularly in supporting the delivery of learning activities. For example, actors are recruited to perform in educational plays in historic houses; artists are employed to interpret paintings in galleries and help people create their own responses to collections; gardeners are recruited to take garden tours or teach visitors about garden design or planting.

If you are looking to find an expert to help support learning through or about any aspect of heritage, here are some ideas for where to start your search:

- GEM Freelance Network (available on the GEM website – [www.gem.org.uk](http://www.gem.org.uk))
- LONSAS ([www.lonsas.org.uk/](http://www.lonsas.org.uk/)) - online resource for education and arts practitioners in London, facilitating wider participation in arts and culture, both in and out of school
- AHI Suppliers Directory ([www.ahi.org.uk/www/suppliers/](http://www.ahi.org.uk/www/suppliers/)) – for finding freelancers supporting interpretation in heritage
- GEM JISCmail – join this free GEM discussion list and ask other people for recommendations (simply go to this link and follow the instructions: [www.jiscmail.ac.uk/lists/gem.html](http://www.jiscmail.ac.uk/lists/gem.html))

Remember, ask to see examples of people's work and if possible find someone who comes with a personal, trusted recommendation.

## 19.3 Freelancer brief

Once you have made the initial contact with a prospective freelancer you will need to send them a brief for the work. The brief should contain the following information:

- A description of the project and its aims and objectives
- A detailed description of the work involved (including estimated hours/days) and the outputs/outcomes required
- The support available to the freelancer in carrying out this work (i.e. staffing at learning sessions, briefing meetings, resources, equipment)
- Guidance on payment including expenses and the nature of the contract (although at this stage, you do not have to specify exact rates of pay)

This brief will give a freelancer a guideline for determining how much he/she will charge for the work and give you an outline for creating a contract.

### 19.4 Costs

You should know your maximum budget for paying freelancers. If the freelancer submits a price quote that exceeds your budget, have a conversation about how the project can be adjusted so that it will fit within your budget and still meet the learners' needs and expectations. Stay positive through this negotiation process! Many freelancers are willing to work with you to make a project possible. However, you must know your limits and feel free to look for another freelancer if a sufficient compromise cannot be reached. Rates of pay vary considerably depending on the freelance expertise involved.

### 19.5 Freelancer contract

The contract will include all of the information contained in the brief and any subsequent arrangements you have made with the freelancer. However, it must contain the following information:

- Fee & expenses
- Time and method of payment
- Equipment costs
- Work to be done
- Outputs & outcomes
- Start and end date
- Type of contract – i.e. fixed term
- Place of work (any travel requirements)

#### Action Points

- Work out exactly what you want the freelancer to do
- Ask for advice and personal recommendations when selecting a freelancer
- Don't be afraid to negotiate



In some ways organising the session timetable can be the most complex element of the planning process. You may be working with several groups over several sessions in different places. There are a lot of things to think about.

## 20.1 Session length

Sessions of longer than two hours tend to lose their focus. By the end of the second hour participants are getting restless and start to break away into individual conversations which, even if related to the project, can be very disruptive. Also there is often a need with older people for them to take medication or, if you are working in a communal lounge or dining room, for scheme staff to set up for the next meal time. You will also need to plan for a break half way through for refreshments and comfort breaks.

You should add on time before and after the session to allow for:

- Travel time to and from the session for participants and facilitators
- Set up and clearing up time for the facilitators

Realistically, you are unlikely to be able to run more than two sessions in a day.

## 20.2 Availability

You will be dealing with a number of different timetables:

- Participants
- Housing staff
- The programme of activities for the home/housing scheme
- Freelancers
- Project staff

To the best of your ability, you should try and establish everyone's availability for the duration of the project, at the start. Having this to hand will help you plan. If you are working with a housing association, the housing scheme manager should be able to help you in this process. Do recognise that you will not realistically be able to choose a time, date, day or venue that suits everyone.

## 20.3 Frequency

The project that you are running may have time constraints and these might be outside your control, such as the timetable of a funder. However, if you can avoid it

do try not to run all sessions within a one week period, particularly if your participants are frail or have health problems. Short timescales can make the experience too intense and you may experience difficulties in getting all of the people to all of the sessions. At the other end of the scale, if you run the sessions spaced widely apart you may lose the interest of the participants, who might be liable to forget what happened in the last session. A regular, well-spaced, timetable will give participants a break and time to look forward to the next activity. You will also need to remember that staff and facilitators will need enough time to prepare for the sessions and evaluate them afterwards.

## 20.4 Dates/Times

It will prevent confusion if, when possible, you have a group's sessions on the same day and at the same time each week. It will also make planning easier for venues. Be particularly clear with any facilitators or freelancers about the need to stick to planned dates and times. For participants this type of activity can often be a highlight and a long-awaited event; the impact of cancelling or even postponing events can be much greater than you might anticipate – particularly when some individuals might be suffering from depression or other forms of mental illness. Cancellation or postponement needs to be avoided at all costs.

### Action Points

- Keep sessions to 2 hours maximum and allow time for breaks
- Try and plan the timetable of session in advance
- Hold sessions at regular intervals over a sustained period of time



# 21 : Facilitating the learning

You have planned the learning session and you are clear about what you are hoping to achieve, but in order to meet your session goals and satisfy the individual learning objectives, you need to be able to run the session effectively and communicate clearly with the learners.

## 21.1 The set up

What will the physical relationship be between you (or another facilitator) and the group? You need to create a relaxed environment, enable easy interaction between participants and also allow people to focus on the facilitator. Think about the following:

- Where will the learners sit? Around a table or in a circle of lounge chairs?
- How will you make sure that you can be heard and seen by everyone and that they can be heard and seen too?
- If you have staff recording or photographing, where will they be in the room and how intrusive will their activity be for the learners?

## 21.2 Icebreakers, warm up and closing activities

Always start each session with a warm-up exercise. In the first session this should include introductions and then perhaps an activity that gets the learners talking to each other. In a follow-up session it is a good idea to use the warm-up as a way of reminding the learners of what they did last time.

### Example of a 1<sup>st</sup> session ice-breaker

Pair up learners. Ask the learners to tell their partner a one minute story of an event from their life. The partner then feeds back to the group.

### Example of a follow-up session warmer

In the last session we explored how smells can trigger memories. Think of some examples of sounds that could trigger a memory (i.e. a bicycle bell might trigger memories of the baker delivering bread on his bike).

These types of exercise will also help newcomers to engage with the group without feeling awkward.

## 21.3 Learning styles

Different people learn in different ways, so try and include different types of activity in your session:

- Visual learners – viewing text and images, making notes or writing stories
- Auditory learners – sound recordings, listening to people speak
- Kinaesthetic learners – handling and touching objects

You should find plenty of information about learning styles in your local library and online.

## 21.4 Disruptions to the session

The other difficulty that can affect sessions run within sheltered housing schemes is the interruptions caused by professionals or visitors needing access to the participants. A couple of incidents that the SOYH sessions encountered included:

- A district nurse turning up to take participants off, one by one, for their flu jab; and
- A participant who couldn't come to the session until his carer had arrived to wash and dress him, generally half an hour after the start of each session

Having a good relationship with the scheme manager and being able to be flexible with the sessions is essential to help overcome such problems. If the scheme manager knows that these incidents are likely to cause problems, and informs you of this, you will be able to make plans to deal with them. This could include planning the session so that missing individuals are able to slip into the group easily. What is important is that no issue is made of this that causes embarrassment to the participants.

## 21.5 Language

Be clear and straightforward without being patronising. In the SOYH project we began by referring to those taking part in the project as "learners", but a number of people found this term derogatory. We changed the description to "participants" which suggested a more equal relationship between those taking part in and those overseeing the delivery of the project.

Avoid language that may appear too high-brow or specialist and try to find analogies relevant to the participants when it is hard to explain a particular issue or topic. Avoid topics that appear to be targeted at one

particular section of the community (i.e. women, miners etc).

## 21.6 Voice

Speak clearly and articulate well, but don't go over the top. If someone has a hearing impairment, it is unlikely that shouting will help. Remember to pause and allow enough time for people to digest information and perhaps reflect on it a little through discussion or comment. Allow time for questions and the odd diversion.

## 21.7 Further guidance on facilitating learning with the over 60s

Most professionals working with the over 60s are more than happy to talk to another professional who is looking to provide some sort of fun and stimulating project for their client group. Look into what organisations or groups are providing services for the over 60s in your local area; contact them for any advice and guidance.

There are also a number of national organisations who can share expertise and information on working with this age group:

National Association for the Providers of Activities for Older People - [www.napa-activities.net/](http://www.napa-activities.net/)

Age Concern/Help the Aged - [www.ageuk.org](http://www.ageuk.org) - particularly [www.ageconcern.org.uk/AgeConcern/how-to-order-information.asp](http://www.ageconcern.org.uk/AgeConcern/how-to-order-information.asp) and [www.ageconcern.org.uk/AgeConcern/developing\\_services.asp](http://www.ageconcern.org.uk/AgeConcern/developing_services.asp)

Carers UK - [www.carersuk.org](http://www.carersuk.org)

Alzheimers Society - [www.alzheimers.org.uk](http://www.alzheimers.org.uk)

Age Exchange - [www.age-exchange.org.uk](http://www.age-exchange.org.uk)

Social Care Institute for Excellence - [www.scie.org.uk](http://www.scie.org.uk)

Skills for Care - [www.skillsforcare.org.uk](http://www.skillsforcare.org.uk)

Speechmark - [www.speechmark.net](http://www.speechmark.net)

Joseph Rowntree Foundation – report on social well-being for elderly people in social housing - [www.jrf.org.uk/publications/promoting-social-well-being-extra-care-housing](http://www.jrf.org.uk/publications/promoting-social-well-being-extra-care-housing)

Department of Health – social care for older people [www.dh.gov.uk/en/SocialCare/Deliveringadultsocialcare/Housing/DH\\_083237](http://www.dh.gov.uk/en/SocialCare/Deliveringadultsocialcare/Housing/DH_083237)

[www.dh.gov.uk/en/SocialCare/Deliveringadultsocialcare/Olderpeople/DH\\_079334](http://www.dh.gov.uk/en/SocialCare/Deliveringadultsocialcare/Olderpeople/DH_079334)

Department for Communities and Local Government – Supporting People -[www.communities.gov.uk/housing/supportandadaptations/supportingpeople/](http://www.communities.gov.uk/housing/supportandadaptations/supportingpeople/)

A more comprehensive list of organisations supporting work with over 60s is available in the NIACE/BIS document: Enhancing Information Adult Learning for Older People in Care Settings; Guidance for Learning Providers – [www.niace.org.uk](http://www.niace.org.uk)

During the SOYH project, we worked with a range of different participants. At least two groups were very frail with a range of illnesses and medical conditions. We review the experience of working with these less able groups in the **In Focus - Directing learning with the frail elderly** – at the end of this booklet.

### Action Points

- Create a relaxed environment that enables easy interaction
- Plan a warm-up activity for each session
- Use your voice, body and language to communicate clearly



## 22 : Creating the resource

By the end of the taster session or session one, the group will hopefully have decided what resource they would like to produce. You may need to use the expertise of a freelancer in the creation of a resource – for more information on working with freelancers, see **19 Working with freelancers**. But there are some general areas to think about when working with this age group on the production of resources.

### 22.1 Managing expectations

If, as with the SOYH project, you are only able to run a limited number of sessions, it is important to set parameters for the production of the resource that will enable it to be delivered within the timeframe. For example, four two hour sessions would be insufficient time to create a theatrical production, but producing some short scenes or sketches might be achievable. As discussed in **18 Planning the learning** you should be clear with participants about these parameters from the outset. You should also involve your partners i.e. the housing scheme managers at this early stage of process. They may have expectations of the project, which you need to manage, but also they may have a view on what a group of individuals might realistically be able to achieve. Finally, don't assume that the more active and independent the group, the more sophisticated the resource they will produce. One particular SOYH group was so active that sometimes they would have other appointments that clashed with the sessions and it became very difficult to get the whole group together at any one time; making progress – even on deciding the resource – very slow.

### 22.2 Involving the participants

The participants will want to get involved in varying degrees. Most important is to enable each individual to be engaged to a level with which they feel happy and comfortable. For example, some individuals will want to take part in the practical aspects of producing the resource, such as:

- using a camera and taking photographs
- scanning images
- recording stories or taking part in interviews
- learning dance moves
- writing stories
- researching
- finding materials

Other individuals might want to be involved in activities supporting the production of the resource, such as:

- discussion, comment and sharing of ideas, stories, and knowledge
- listening to music
- watching films
- singing
- looking at photo albums and other literature
- handling objects

Some individuals might be completely passive and remain observers throughout. It is tempting to engage most with those who are most active, but although the type of engagement is different with different individuals, this doesn't mean that it should be less frequent or focused. Just spending some of the time sitting with someone who is "observing" and pointing out interesting objects or facts can be as valuable for that individual as helping another to use a camera.

### 22.3 Type of equipment/materials

When you start a set of sessions with a group you might not have any idea of what equipment you will need. Hopefully by the end of the first session you will have developed an understanding of the direction of the rest of the sessions and also what you might need to facilitate them. Having a good overall plan for the sessions as well as individual session plans will help you to organise this. For the SOYH project we bought a laptop and scanner to work with one group on developing a photo essay book, and found that we then used them both at nearly every other session. The laptop, which had a large screen, became invaluable for enlarging photos and text so that those with visual impairment were able to see them. In one case we were able to scan a lady's photograph album, and then enlarge the photos of her late husband so that she could see them. She had not been able to view photos of her husband and children for many years. Don't forget to ask participants what materials and equipment they would be interested in using.

### 22.4 Accessing materials

Once the participants decide on the direction of their learning, they can start accessing learning and creative materials. You can assist in this process by researching places where they can start their research (local libraries, archives, tourism centres, museums, galleries and heritage centres). Participants may also want to do some

personal research and bring old photographs, letters or documents to sessions.

While your role as the facilitator is to guide the group and their sessions, participants must be involved in all aspects of the learning process. It should be stressed that this is their project and you are there to assist as they create the resource.

## 22.5 Staffing

Staffing levels for the sessions will vary widely, according to the ability of the group and the type of resource that you are trying to develop. However, generally, during the SOYH project, we found the sessions required two members of staff as a minimum. If you have frail and infirm groups you will need extra staff on hand for assisting the participants in going to the toilet as well as helping them look at objects or work on their resource. You may also need extra staff if there is a difficult group dynamic (i.e. one dominant individual in the group) so that the facilitator doesn't have to spend all their time managing the group rather than facilitating learning.

If you have need of a special set of skills, such as a freelance photographer, then it is likely that it will be the freelancer and a member of your own project team.

## 22.6 Session time and time outside of sessions

The SOYH project allowed for four two hour sessions with each group. This enabled participants to learn and to direct their knowledge and skills towards the production of a resource. It did not allow for participants to completely create the resource themselves, but relied on the freelancer or facilitator to contribute to the creation of the resource outside session time.

Although session participants were encouraged to sustain their learning between sessions, very few spent any additional time working on the physical production of the resource. Participants may not have the opportunity or access to the space to come together as a group other than during your session and they may not have the capacity or resources to do so either. Therefore, unless you have a substantial amount of session time, expect the physical creation of the resource to be carried out largely by project staff and freelancers outside session time.

### Action Points

- Manage expectations re. the creation of the resource
- Pay attention to less active participants
- Allow staff time outside the sessions to help with the production of the resource



# 23 : Participant development

When planning informal adult learning, you should aim to provide support which gives participants the opportunity to develop; rather than one-off, disconnected activities. You need to identify learning outcomes for the groups and individuals involved, monitor progress against those outcomes and help participants to pursue their learning and development beyond the life of the project.

## 23.1 Learning outcomes

It is easy to lose sight of individual learning outcomes, when you are working with a group. But everyone learns in different ways and it will not often be possible to encourage participants to develop against the same outcomes at the same pace. You should try and identify different learning outcomes for each individual. If you are working with the frail elderly or those with mental health problems, you will probably involve other care-givers in this process. You can then add these learning outcomes to any you have identified for the group and build them into your session and series plans (see **18 Planning the learning**).

Here are some of the areas in which you might monitor participant progress:

- The acquisition or development of a particular skill i.e. photography, using a pair of scissors
- The development of generic skills i.e. conversation, listening, thinking, analysis, research
- The acquisition of knowledge and/or understanding
- Levels of enjoyment and inspiration
- Behaviour and activity
- Attitudes

The above areas are loosely based on the Generic Learning Outcomes developed as part of the Inspiring Learning for All framework.

Visit [www.inspiringlearningforall.gov.uk](http://www.inspiringlearningforall.gov.uk) to find out more.

## 23.2 Individual learning plans

Having identified the learning outcomes for each participant, you can draw up an individual learning plan. This needn't be long and complicated, but should set out the following:

- nature and ability of the individual
- their individual learning outcomes
- how the project can help them to achieve those outcomes

- measurement of achievement against outcomes opportunities for development beyond the end of the project

## 23.3 Encouraging development

A properly planned and facilitated activity session is 90% of the work that needs to be done to encourage participants to grow and develop. An excellent session will have built into it activities that compliment the desired learning outcomes for particular individuals (personalised learning). But it is important to strike the right balance between supporting and stretching an individual to achieve. Some individuals will respond well to challenging activities and these will encourage development; others will feel intimidated by such activities and will benefit much more from a supportive learning environment that builds their confidence and lets them learn independently.

Visit [www.rarpatoolkit.com/en/rarpa.asp](http://www.rarpatoolkit.com/en/rarpa.asp) to find out more about "recognising and recording progress and achievement"

## 23.4 Measuring achievement

There are a number of ways in which you can measure achievement. Perhaps none of them are entirely reliable, but they give a good sense of the type and degree of progress that has been made by participants:

- observation of participants – both in and out of sessions
- discussion with care-givers
- feedback forms
- feedback discussion with participants

By using a number of the above methods, you are more likely to get a rounded view of how the participant has developed over the course of the sessions. You should also think about measuring achievement at various stages of the project – it may be that a participant makes dramatic progress over the first two weeks then none at all in the final six weeks.

## 23.5 Planning next steps

Enabling or signposting further learning and development for project participants is very important. In fact, it is another part of the legacy of your project. You need to help participants to link their experience of your project with other opportunities for pursuing their interests and further developing their skills, knowledge, enjoyment etc.

The guidance you provide to project participants for pursuing learning will vary according to the circumstances and abilities of each individual. The principle should be to provide guidance which is relevant and realistic for the individual concerned. Here are some suggestions for what to include:

- Join a society or special interest group
- Join a community organisation
- Visit a particular shop
- Use the internet to research or to shop
- Visit a museum or other site of interest
- Go to the library to find some information
- Talk to individuals with shared knowledge or interests
- Read a particular book

## 24.6 Communicating next steps

An important element of the final stages of the SOYH project was a letter to each project participant. The letter thanked them for taking part in the project, summarised their achievements (referring to their individual learning plan) over the course of the project and highlighted the ways in which they might take their learning forward. The letter reflected on the experience of the group as well as the experience of the particular individual and gave guidance accordingly. If you are not able to communicate these next steps to the participant by letter, you might instead have an informal chat with the participant or their care-giver.

You might also think about keeping in touch with the participants and/or their carers for some time after the project has finished. This can encourage individuals to pursue their interests more actively because they still feel part of the original support group. But you must also respect the wishes of those individuals who are no longer interested in maintaining contact as well as being realistic about your own capacity to stay in touch.

### Action Points

- Create learning plans for each participant
- Find the right balance between stretching & supporting individuals in their learning
- Support participants in pursuing their learning after the project has finished



You want to ensure that the project participants have equal opportunities to benefit from the learning sessions. So you need to understand any circumstances that might limit those opportunities and try to provide the appropriate support. But remember, ask the participants what sort of support they require in order to make the learning accessible. You don't want to make unnecessary arrangements that make the participant feel uncomfortable and cost the project time and money.

### 24.1 Language and translation

If your project includes individuals whose first language is not English you may need to factor in translation and interpretation support. If you are working with a registered social landlord or other professional organisation, they may already have access to these services. Your local authority might also be able to help.

### 24.2 Religious belief and cultural tradition

Be aware of any religious or cultural beliefs and traditions. Offending your learners will not make the project a success. If in doubt ask the learners themselves. They will more than likely be happy to help you gain an understanding of any issues, and will probably have an idea of how they can be overcome. There may be particular days of the week or times of day during which some individuals cannot participate in learning sessions. There may be particular dietary requirements for certain individuals associated with their religion.

### 24.3 Physical disability

#### Wheelchair users

You may have wheelchair users in the group, so this is important to consider when choosing venues for sessions. The doorways need to be wide enough, there needs to be step-free access and there needs to be a fully-functioning disabled access toilet on site. Remember that there are different types of wheelchair – manual and motorised - and a range of sizes and models of both. Make sure you ask the wheelchair user about any particular requirements they might have. For example some wheelchairs don't work well outside if it's raining and some wheelchairs require particular types of lift mechanism and internal arrangements in order to fit into a vehicle. You may well need to think about bringing in additional staff to help those with disabilities.

[www.apparelyzed.com/etiquette.html](http://www.apparelyzed.com/etiquette.html)

[www.wheelchairuser.net/](http://www.wheelchairuser.net/)

#### Visual impairment

The level of support required will depend on the degree of visual impairment. Again, you may need to think about an additional member of staff to help out – particularly when accessing the venue. During the learning session itself, you might be able to support a visually impaired learner by providing text in large print or focusing on activities that use senses other than sight. [www.mib.org/Pages/Home.aspx](http://www.mib.org/Pages/Home.aspx)

#### Auditory impairment

You may need the support of an individual trained in British Sign Language or you may need to think carefully about ensuring that an individual with hearing problems can easily lip-read those who are speaking. Alternatively, if the individual will benefit from an induction loop, then try and find a venue that can provide this support. Again, including activities in a learning session that use senses other than hearing will be important. [www.rnid.org.uk/](http://www.rnid.org.uk/)

### 24.4 Physical health

You may be working with individuals who are quite frail and have restricted mobility. Often the best way to ensure that people get the most out of the learning experience is by having extra, specialist staff on board. You need to think about planning learning sessions which are as comfortable as possible for people. Have you got comfortable chairs for people to sit on? Is it easy to get to the toilet facilities? Is there someone on hand who can help in case of an accident or medical problem? You may have participants with arthritis or restricted mobility of their limbs and again, it may be useful if they have someone to help them with more manual tasks. Many individuals will feel reluctant to go into a new environment if they are uncertain of the support and help available there.

There are of course a range of other reasons why an individual of any age might find it difficult to fully engage with the learning experience; For example learning difficulties, poor literacy and numeracy skills, poor social skills etc. We have tried to address some of these barriers in sections on **18 Planning the learning** and **21 Facilitating the learning**.



**Action Points**

- Consult with the group about their access needs
- Remember that access needs might not always be obvious
- Take the appropriate steps to improve access

# 25 : Health, risk and safety

The steps you take to ensure the health and safety of staff and participants don't have to be burdensome; simply practical and proportionate.

## 25.1 Health & Safety

When working within registered sheltered schemes or care homes it is the responsibility of the scheme to ensure the health and safety of project participants. It is important that you discuss health and safety with the scheme manager and familiarise yourself with their policies and then ensure that your sessions adhere to these policies.

You will also need to think about the health and safety of your own staff – particularly the staff who are working directly with participants. You should have a health and safety policy for your organisation anyway, but you should also draw up a policy specifically for these activities.

For practical guidance on health and safety issues, visit [www.hse.gov.uk/](http://www.hse.gov.uk/)

## 25.2 Risk Assessment

An integral part of your health and safety policy, will be the action you take in terms of assessing risk. You might think about producing a standard risk assessment for each group you are working with. Find out everything you can about the group members and the place of learning and, if possible, work together with an individual who knows the group well (i.e. a housing manager).

You will then have to amend and adapt the risk assessment for each session, depending on the activity being offered, the venue and the nature of those taking part. For example, if you want to take the participants to the museum, visit the museum first to ensure that they are able to cope with the number and nature of people i.e. Do they have disabled access? Are there appropriate toilet facilities? Is there enough seating? For the SOYH project, the museum provided chairs in the galleries for our participants to enable them to have a rest when required. You should also involve any freelance staff to help you to identify any risks posed by running particular activities. For example participants with dementia or poor sight might be endangered by using items such as scissors. What is the level of this risk? What can you do to mitigate it? In addition, you will need to make sure that you have gone through a similar process with any external transport company you are using.

## 25.3 Safeguarding & CRB checking

Whether it is working closely with young children, individuals with disabilities or vulnerable adults, it is extremely important to ensure that the professionals and volunteers working with the group are fit to do so. It is not only ethically sound, but legally required that all professionals or volunteers involved in programme sessions have an enhanced CRB disclosure.

CRB disclosures are requested by employers or other group leaders for particular members of staff. The CRB disclosure will be based on the relevant history of the individual you are employing up until the point of employment. Therefore, someone who you employ to work on your project may well have a CRB disclosure for a previous job. It is up to you as an employer to decide whether or not to take their previous CRB disclosure as proof enough of their suitability to work with your project participants. Many employers choose to carry out another check.

If you are working with a housing society or a city council that regularly processes background checks on prospective employees or volunteers, they may easily direct you through the application process. However, if you are working more independently, you may need to complete an application through a CRB processing centre.

### Completing the application

Various forms of identification are needed in order to complete the application. These might include:

- Passport (any nationality)
- UK birth certificate
- UK issued Driving Licence
- EU National Identity Card
- Financial statement (with current address)
- Utility bill (with current address)
- Recent addressed payslip
- Work permit/Visa (UK)

Please note that CRB disclosure can be a lengthy process – particularly if workers and volunteers have moved a lot within the last five years or lived in different countries.

The cost for CRB checks vary depending on the way in which the application is processed: individually, through an agency or as a volunteer.

Visit the Criminal Records Bureau website for more information. This also contains guidance on the new Vetting and Barring Scheme (VBS): [www.crb.homeoffice.gov.uk](http://www.crb.homeoffice.gov.uk)

**Action Points**

- Understand and adhere to relevant health & safety policies
- Complete a risk assessment for each session
- Ensure all staff/volunteers working with vulnerable adults are CRB-checked



Celebrating the involvement and the achievements of participants (and partners) should be a key feature of your project. It is a way of showing that you value everyone's contributions and it is an opportunity for those involved to feel proud of what they have achieved.

### 26.1 Celebration event

The celebration event is the grand finale. It doesn't matter how much or how little an individual has been able to contribute to the project, this event recognises the fact that they have taken part. It is a chance for the participants to share their experience with their friends and family. The celebration event is also an opportunity to bring project partners, stakeholders and staff together, to advertise what the project has achieved and to show others what is possible.

#### Who to invite

The guest list will vary depending on who your partners and participants are. For the SOYH project, we invited:

- Participants
- Friends and family of the participants
- Session facilitators, including museum partners
- Scheme managers and staff
- Local councillors
- Senior housing managers from the partner organisations
- Other local dignitaries as listed by participants (including local church leaders, local village newsletter editor, mayor, community workers etc)
- Press
- GEM management

#### Venues

Your choice of venue will depend on the size and access needs of the participants. You might also think about how easy the venue is to reach by public transport – particularly for those partners and stakeholders who might be coming from some distance.

If you are working with the frail elderly, you may find that it is best to hold the celebration event on site, to encourage more participants to attend. You may need to bring two groups together for a celebration event – particularly if you plan to invite the same dignitaries and partners to each event.

It is important to provide transport for those who need to

travel to the celebration events.

#### Structure and content

Try to involve the participants in the planning of the event and in the setting up and running of the day. This will give them a sense of ownership of both their work and their celebration. Draw up a programme for each event. Talk it through with the participants (where possible) and see if they have anything that they would like to add. Ask them if they would like to say something. Make sure that everyone involved is aware of the programme and their part in it.

With the structure and content it is important to find a balance. Too many speeches and people become restless and bored. This will take the shine off the event and may make the participants feel that the event is more about the professionals patting themselves on the back. Too few speeches and they may feel that they have not been taken seriously enough.

#### Catering

It is important to provide refreshments at the celebration event. It helps to create a sense of occasion. You might be able to use the onsite caterers if you are basing the event at a housing association site or other community venue. Alternatively, look for recommended local caterers or provide some light refreshments yourself (although you will need to make sure there are tea and coffee making facilities on site).

#### Logistics and set up

Planning a single celebration event can be complex enough, especially if you are planning it whilst trying to complete the project. Planning multiple events, whilst trying to complete the project, requires precision planning. Each element, no matter how small, needs to be thought out.

### 26.2 Recognising achievement

There are many other ways to recognise the achievements of the participants. Here are some suggestions:

#### Photographs

Take photographs of the participants and their work. You can give copies of these to participants and their families and use them to create an exhibition at the celebration events.

**Guest book**

Bring a guest book to your celebration event/s and invite guests to write their comments about the project and the achievements of the participants. Send a copy of the comments to the participants.

**Resource**

Make the resource produced by participants the centre piece of the celebration events. Where possible, give participants a copy of the resource.

**Certificate**

Present each participant with a signed certificate of achievement at the celebration event. Where possible get a local dignitary to present the certificate. You should also try and get photographs of each participant receiving their certificate.

**Action Points**

- Involve participants in planning their celebration
- Use the celebration event as an opportunity to bring everyone together
- Make sure the event has a real sense of occasion



# 27 : Project photography and video

Taking photographs and making videos of your project activity is useful for a number of reasons, it:

- Provides evidence of project activity (to include in project reports or on your website)
- Can be used to market and publicise project activity (accompanying newspaper articles, exhibited at celebration events etc)
- Can be used to assist evaluation (recording people's feedback, reviewing photographs)
- Can be used to illustrate project resources and dissemination materials (toolkits)

## 27.1 Photographs

Taking photographs of project activity is one thing, but taking good quality photographs is another. You can keep costs down by doing the project photography yourself, but reading through the headings below, you may well decide that it is worth investing in hiring a professional photographer; if so, have a look at the section **19 Working with freelancers** for more guidance on hiring in external support.

## 27.2 Video

Again, employing a professional to take the video footage is often the best way to achieve good quality results – particularly if you want to use the video as a serious promotional tool (as we did with the SOYH project, producing a short promotional video for a professional audience). You might want to produce a video diary of the project, but think carefully about who will watch this footage – something short is much more likely to keep people's attention and make an impact. Remember, producing a video is very expensive, so be sure that you are clear about what you want it to achieve.

## 27.3 Format and equipment

### Photography

Here are some basic guidelines for ensuring that you end up with good quality images that can be reproduced, enlarged and printed:

- Use a digital camera, so that you can delete unwanted images as you go
- Your camera should have at least three mega pixels, to ensure that you have high resolution images
- High resolution is about making sure you have a large number of dots per inch, so that the image can be enlarged – 300 dots per inch (DPI) is a

good guide

- Most cameras will take photographs in JPEG format – this is a good format to use for displaying images on screen i.e. a website
- If you want to print images, resave your JPEG photographs as TIF files

### Video

You can make a video using your mobile telephone or your camera, but if you want good quality footage, you should really use a digital video camera. Make sure that the camera has a good sound recording facility and if necessary, purchase a microphone that you can attach to the camera to record sound (i.e. during interviews). Typically your camera will come with a memory card, mini-DVD or mini-DV tape on which to record your footage. You can then transfer this device to your computer and most MACs or PCs will have software - such as Windows Movie Maker – to help you edit your footage.

## 27.4 What to record

### Photography

Photograph as much of the project activity and as many of the project participants and project staff as possible. You want to have the flexibility to use images as often and in as many ways as you like. For SOYH, we agreed with the project photographer that he would take photographs of at least one session with every group and would also photograph each celebration event. The photographs of the sessions included photographing the resource itself, other objects and materials that were being used in the project and the project participants. The best shots were those that focused in on objects and people and captured the emotional sense of the activity i.e. smiling, laughing, concentration, fascination etc.

### Video

Video is a little less effective at capturing moments and expressions but is great at documenting interaction, dialogue and information. As well as filming activity and discussion, you can also ask informal questions of participants or project staff as the activity is taking place. Alternatively, you can set up more formal interviews with chosen individuals and ask specific information about them and their experience of the project. Ultimately, this range of video footage will be edited into a story of images and dialogue, but as with the photographs, you want to make sure that you have a good selection of

footage to edit. Decide well ahead how your video will look. Discuss it with your video producer and seek his/her advice. He/she will tell you if what you want is possible or not.

When it comes to deciding who will take your project photographs and/or make the video, do think about how much time is going to be needed to film or take photographs and then potentially to edit and reproduce the material. For example, SOYH project staff quickly found it impossible to run a session and to take photographs – there simply wasn't the time.

### 27.5 Using other images and footage

You can use other images and footage, particularly to illustrate your project activity and any resources you might be producing. For the SOYH project, we also used many old photographs of our participants, objects and places. We took a scanner and a laptop to most sessions which meant that the participants did not have to let their precious photos out of sight and had the opportunity to learn how to scan photos and manipulate them on the computer.

### 27.6 Photography and video during learning sessions

Taking photographs or videoing during sessions can be intrusive. This process needs to be managed very carefully and if you are working with a professional cameraman, ensure that you employ someone that is as good with people as they are with their camera. Do warn participants that there will be people taking photographs and video footage. People may wish to present themselves in a certain way. Introduce them to the professional so that they can ask questions and feel more comfortable about the process. Tell them what the images will be used for, and also whether or not they will be given any copies. We found that once the groups were comfortable with the photographer in particular, and the fact that images were being taken they forgot he was there.

### 27.7 Image permissions

When taking and using photographs of people; you must obtain their permission. We incorporated this into our registration forms.

### 27.8 Copyright

With photography, as with art, the copyright remains with the photographer. However it is important to remember that if you have government funding the copyright for any book etc produced with their funding will hold Crown copyright.

### 27.9 Where to find talent

When looking for professionals in this field try and get recommendations (preferably more than one) so that you can make a comparison on price and images. Look at the work that they have done previously. Make internet searches, many will have websites where you can view their work, and if necessary place advertisements.

#### Action Points

- Be clear about what you want to achieve through photography and video
- Record more footage than you need
- Be sensitive in your use of photographs and video



The starting point for any marketing exercise has to be to develop a plan or strategy. For a small project this may only be one side of A4, but it is important to set out what needs to be done, when it needs to be done and how much money you have to spend. These are some of the elements that need to feature in your marketing strategy:

### 28.1 The message

What is your project about? What are you trying to achieve? Refer back to **Developing the idea** to remind yourself of those few core sentences that encapsulate your project. This is the core message of your project and if the target audience, partners, stakeholders do not understand what it is that you are trying to achieve they are unlikely to engage with you.

Alongside the core message, you should also have specific messages for particular audiences. For example, your message to the local press might be about "helping to strengthen the local community by encouraging respect for and interest in our elderly residents' heritage". Your message to a national housing association might be "the benefits of heritage learning activities in promoting interaction and personal well-being amongst elderly residents". It is good to establish these messages early on and have them at your fingertips when producing reports, press releases or talking to people about your project.

### 28.2 Branding

Branding is a multi-dimensional area and we won't go into great detail here except to say that making your project recognisable is important. It doesn't have to involve great cost. You can develop a brand by:

- Identifying a common font and format for all your public documents
- Creating a simple logo and ensuring that you use the same logos on every public document
- Using the same strap lines or repeating the core message in your documents, emails, press releases etc.

If your project has outside funders, you must also consider the use of logos – where and how they are positioned and used. In the case of SOYH, it was specified that the Transformation Fund logo appear in the upper right corner of all printed materials. GEM's style is to use its logo in the upper left corner on documents.

Branding is all about building familiarity with your product and familiarity means people are more likely to engage with your work.

### 28.3 Marketing tools

There should be lots of weapons in your marketing armoury! And different marketing tools will work for different groups. Remember not to produce a marketing material in isolation; your press release should refer to your website, your website should have the project contact information etc. Always give readers the opportunity to find out more.

#### Press releases

Send these out to sector publications, regional and national print press, television and radio. Your press release should include at the end Notes to the Editor (which provides any necessary background information) and the contact details for your organisation or the individual dealing with press and PR.

#### Articles

Contact publications which you think might be interested in your project. Offer to produce a short article. They will be particularly interested if you can find an "angle" for your article which suits their readers.

#### Website

If you have a website for your organisation, keep it updated with information about the project and include your web address in any other marketing materials you produce.

### 28.4 Networking and communications

Alongside traditional, formal marketing and PR activity, you should also try and maintain the profile of your work within your organisation and sector. The aim of this communications activity is to create a "buzz" about your work and consequently build up a willing workforce of advocates for your project. The people you need to think about are: staff not working on the project, trustees and senior management, project partners, project stakeholders, your network of contacts (in the case of GEM, this would include GEM members), other contacts in your sector.

Some ways of promoting your project to these audiences might be:

- Internal newsletters or intranets
- Project reports to senior management and trustees

- Email updates to project partners and stakeholders
- Speaking at conferences, events and meetings within the sector
- Attending networking events

## 28.5 Dissemination

The marketing of your work doesn't stop when the project finishes – it simply takes a different form. Even if you are unable to sustain the work of the project in the long term, you can ensure that it has a legacy by sharing what you have learned throughout the course of the project: new ways of working; new sources of information; mistakes made and lessons learned. Giving an honest, clear description of how your project went will be invaluable to others who might want to do similar work. You can share your experiences in a number of ways:

- Write an article of case study for relevant sector publications
- Produce some guidance materials or toolkits (online, DVD/CD, paper)
- Run a training event or conference

Disseminating best practice doesn't need to be expensive, but if it is going to cost you money, you should build this cost into the project budget at the outset – indeed for many funders they would want this sort of legacy creation to be part of the project. Alternatively, you can charge for the information you disseminate – particularly if you are running an event or producing a resource, which typically people would expect to pay for.

When writing your dissemination materials, ensure that your reflections on the project are balanced and invite a number of people involved in the project to contribute to this reflection process. It is easy only to identify the negatives if you have been immersed in the delivery of the project and spent little time witnessing its impact on other people. So, don't gloss over the problems, but highlight your successes because in order for others to build on your work and learn from your mistakes, they must be inspired to do so.

## 28.6 Publications in the heritage and housing sectors

Here is a selection of publications across the housing and heritage sectors where you might think about publishing articles or case studies:

**GEM Case Studies** – published in May and November every year and containing case studies of innovative education practice through heritage with a wide variety of audiences – [www.gem.org.uk](http://www.gem.org.uk)

**Our Place** – The Our Place network is a free online forum for sharing ideas about how to broaden engagement with heritage; you can upload documents, publicise events, talk through particular problems or issues. It is free to join - [www.ourplacenet.org.uk/](http://www.ourplacenet.org.uk/)

**GEM JISCmail** – this is a free email list for those involved in heritage education. To join, follow the instructions via this link - [www.jiscmail.ac.uk/lists/gem.html](http://www.jiscmail.ac.uk/lists/gem.html)

**Community Care** – this is the hub for all those working in community care, producing a magazine, comprehensive website, forum and blog - [www.communitycare.co.uk/Home/](http://www.communitycare.co.uk/Home/)

**Social Caring Magazine** – monthly magazine on social care - [www.socialcareassociation.co.uk/Default.aspx?tabid=67](http://www.socialcareassociation.co.uk/Default.aspx?tabid=67)

**Health & Social Care in the Community** - International journal covering the common ground between social care and health. Includes research papers, news, reviews and evaluations of practice and policy (tel: 01865 791100, email: [hsc@man.ac.uk](mailto:hsc@man.ac.uk), editor: Karen Luker)

**Inside Housing** - Information on social housing issues - [www.insidehousing.co.uk](http://www.insidehousing.co.uk)

**Age Agenda Bulletin** – Published by Age Concern, provides updates on changes in policy and legislation in areas affecting older people. Read by older people and those who work with or care for them - [www.ageconcern.org.uk](http://www.ageconcern.org.uk)

### Action Points

- Know your message
- Build your brand
- Use multiple marketing tools

## Reasons for consulting

1) You have a lot of general, sector-based or national evidence suggesting that older people need your project, but do you have any data from your immediate geographical area?

2) You have a great deal of quantitative data supporting the demand for your project, but what about exploring individual opinions and sets of circumstances in your local area? What about collecting some qualitative data?

Making the effort to do some data collection yourself will help you to refine your project idea based on the real, practical circumstances of your local audience. This will help to convince funders of not only of the value of your project but its likelihood of success.

## Setting the parameters

It is important to define why you are consulting and what you want to achieve with the consultation process. Write a brief mission statement that sets this out and constantly refer to it. One paragraph of no more than two or three sentences will do. It will help you to keep your consultation focussed. It is very easy to get carried away by the process and to end up with too much information to analyse effectively.

Identify the 'community' with whom you wish to consult. Remember that a community does not have to be defined by the physical boundary of 'place' it can be a group with a common interest or other such bond. Where are they? How can you best reach them?

Ask your consultation group specific questions; answers to which will help to inform your project development. Structure the consultation flexibly by giving a number of options for delivering certain aspects of the project and allow respondents to make suggestions.

## Timing

When you consult will depend on your reason for consulting (i.e. to assist with development of the idea would require consultation at the beginning of the process etc.). The main factor of timing is to allow sufficient time to find your participants, conduct the consultation, analyse the results, disseminate the findings and ask for feedback on the results from the participants. You may also need to disseminate the results throughout your own organisational structure for comment as well.

## Finding your participants

How you find your participants will depend on who your intended target audience is for the project. If you are intending, as we did at GEM, to work with social housing providers within residential homes, there is little point in advertising in the local paper, or putting up posters in supermarkets and doctors' surgeries. Think about using other professionals that have contact with your target audience. They are usually keen to help, particularly if they understand the benefits of your project.

You may wish to include some professionals that work with the target group in your consultation as they often have a good idea of what will or won't work.

## Mechanisms of consultation

The 'how' of the consultation is a large topic and what works for one project may not work for another. Again the method you employ will also depend on who is being consulted and the nature and complexity of the consultation, as well as the time factors involved. Whichever method you employ make sure that you:

- Convey a clear message as to what the consultation is to achieve
- Give background information on the project
- Convey the role of your organisation and the participants in the process

Techniques can include:

Community conversations - Participants come together, informally, around tables and discuss the project ideas over refreshments. The topics for discussion are preset and each participant's views and ideas are recorded. These are then collated, analysed and distributed to the project management team and the participants for comment. This method works best in the very early stages of project development.

Surveys and questionnaires - This is a tried and tested method, but if you are dealing with people who have a physical or mental disability, it may be best to avoid written feedback methods.

Focus groups - Participants attend by invitation and are drawn from target groups to discuss the project. Focus groups are particularly good for specific project issues and can be called on at any point during the project.

Consultative workshops - Having gained valuable

information from early consultations with professionals working with the target audience GEM employed this method of consultation with its learners. We were able to take elements of our project to potential learner groups and let them try some of the activities. We asked them questions about what they liked, or didn't, and also gained an idea of where they thought the project could go from there. It also gave us a useful insight into how particular groups (particularly those that were more frail or suffering from dementia) would react to different types of activities and facilitation methods.

Shop front consultation - A stall is set up in a place likely to be visited by a high number of the target audience (i.e. libraries, supermarkets etc). Interviewers then discuss the project with individuals as they pass by.

## Evaluation

Remember to evaluate your consultation process to ensure that you are able to do it better next time. Include your promotional techniques, who was consulted, the numbers that you consulted, the methods used, the timescale, the information provided and the feedback from the participants.

The heritage sector is broad. Organisations covered by this banner include: historic houses, castles, ancient monuments, museums, galleries with permanent collections, archives, libraries, historic parks and gardens, industrial and maritime heritage and heritage centres amongst many others. Sites and collections might be in private or public ownership; they might be managed by charitable trusts and foundations or they might be owned by businesses, the military or a university. So if you are thinking about planning learning around your local heritage, look carefully for the individuals and organisations which might be able to support you; they aren't always obvious.

## Organisational structures

The structure of organisations within the heritage sector differs according to their size and type. Most heritage organisations provide learning and outreach services; it is simply a question of identifying who within the organisation has responsibility for this.

### Education Department

Typically responsibility for working with over-60s will fall to the education team and specifically an individual with responsibility for informal or lifelong learning (as opposed to formal learning – which normally means school groups). However, in a small/medium sized organisation, they are likely to only have a single education or learning officer with responsibility for engaging all audiences.

### Outreach Department

If you are thinking particularly of running a project which will be based outside a museum or heritage organisation – perhaps in someone's home or a community centre – try asking to speak to somebody in the outreach department. These individuals run the outreach programmes for a range of audiences; for example bringing handling collections to hospitals.

### Projects Department

In some large organisations, there may be a team dedicated to project work which sees them coordinating project work across a range of departments – curatorial, education, exhibitions etc.

### Curator or manager

In very small organisations, often the curator or manager will have responsibility for the education and engagement activities they offer.

Other titles or departments that might have responsibility for working with over-60s on learning projects are: audience development, visitor services, diversity and inclusion.

## Supporting informal adult learning

Heritage organisations have an important role to play in promoting individual and social welfare, particularly in local areas. Reviewing the 2009 Centre for Urban and Regional Development Studies (CURDS) research into the role of the historic environment in creating a stronger sense of place, Heritage Counts 2009 notes "it is not only living in areas with high densities of historic buildings that matters. Equally if not more important to a heightened sense of place and social capital is the extent to which people understand and take an active interest in the local historic environment". Supporting social welfare through engagement with heritage will grow in importance as recession provokes social and economic deprivation and the potential for social exclusion and community division.

Heritage organisations are also keen to ensure that they engage with the widest range of audiences – not just those from affluent, white, middle-class backgrounds. There is also concern within the sector that organisations must engage more effectively with the growing population of older people. The Museums Libraries and Archives Council have produced a report outlining the benefits for older people of engaging through heritage - [www.mla.gov.uk/what/policy\\_development/learning/adult\\_learners](http://www.mla.gov.uk/what/policy_development/learning/adult_learners)

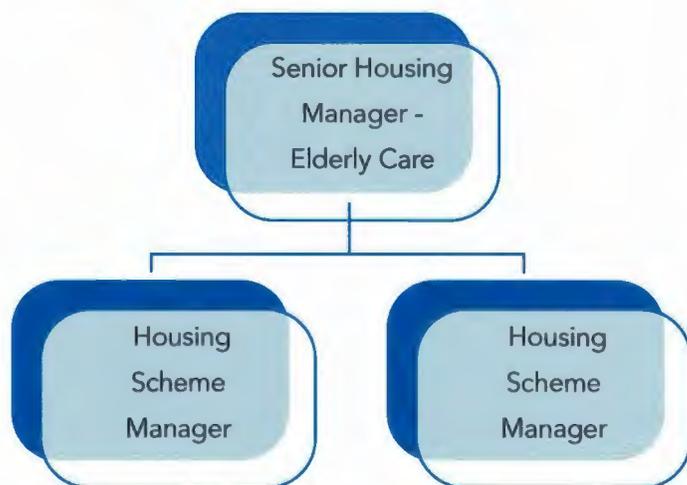
Registered social landlords and council housing departments provide homes for some of the most socially and economically excluded people within our society. Over-60s living in social housing might be living completely independently, in sheltered accommodation (either “supported” or “extra care” and with a housing manager) or in a nursing/care home.

The majority of Registered Social Landlords are housing associations. Housing associations are typically charities (or not for profit) and they are regulated by the Housing Corporation, which also funds new affordable housing – [www.housingcorp.gov.uk](http://www.housingcorp.gov.uk). The Housing Corporation will also provide regional lists of housing providers within England.

## Organisational structures

As with heritage organisations, the personnel structure of housing associations or local authority housing departments can vary, but the typical structure encountered through the SOYH project was:

Structure Chart for Canterbury Schemes



The senior housing manager – elderly care would be responsible for a number of different housing sites for the elderly (or “schemes”) in the area. Each “scheme” would then have its own housing scheme manager. In some cases during the SOYH project, contact was made directly with the scheme manager in the first instance (particularly where it was not clear who the managing local authority or housing association was). In other cases contact was made through the head of housing (senior housing manager), and then meetings were set up with the head of housing and the regional manager, before we were

introduced to the housing scheme managers. In these cases the schemes that we worked at were chosen for us (this in itself led to some issues around understanding the group we were working with, and our preparation for the sessions). In a couple of the schemes we were given the name of a resident who was able to work with us to motivate participants, and in one scheme we were allocated a member of the care team to work alongside us. The structure of all the organisations is roughly the same in terms of hierarchy, but the way in which we interacted with those structures very much varied.

## Supporting informal adult learning

Providers of social housing for the elderly are constantly looking for ways to improve the lives of their residents – particularly in terms of their mental and social engagement. Many providers will be keen to work with partners who can support this agenda. We identified two particular areas in which we were able to support social housing providers:

### Accreditation

The Centre for Housing and Support helps to support and develop professionals in England working in Housing-related support. The centre has established a Code of Practice which is a quality standard encompassing long-term housing-related support services delivered to vulnerable client groups in any setting, including Extra Care and Floating Support. Housing schemes apply to have their service accredited by demonstrating that they meet the Code of Practice. In order to successfully complete this process, they have to produce evidence for and demonstrate that they meet 10 standards: service delivery, policy and legislation, equality and diversity, tenants’ rights, confidentiality, independence and empowerment, the professional role, collaboration and community support, staff training and finally physical environment.

For more information on the Centre for Housing and Support, visit [www.chs.ac.uk/index.php?page=\\_Home](http://www.chs.ac.uk/index.php?page=_Home)

### The Eden Alternative

This is a well-recognised approach to creating positive care environments for the elderly and its principles are upheld by many social housing providers in England and internationally. It focuses on “three plagues” - loneliness, helplessness and boredom - as the main causes of suffering for elders in an aged care environment. This

approach seeks to combat these ills by changing the physical and social environment of an aged care facility, underpinned by a revision of the care philosophy of the organisation.

The following website provides more detail on implementing the Eden Alternative and the impact on elderly people: [www.alzheimers.asn.au/index.php?page=viewStory&id=8209](http://www.alzheimers.asn.au/index.php?page=viewStory&id=8209)

This article looks at how Abbeyfield Housing (one of the housing associations involved in the SOYH project) has adopted the Eden Alternative -[www.communitycare.co.uk/Articles/2009/08/07/112313/The-Eden-Alternative-makes-Abbeyfield-residents39-dreams-come.htm](http://www.communitycare.co.uk/Articles/2009/08/07/112313/The-Eden-Alternative-makes-Abbeyfield-residents39-dreams-come.htm)

## The language of budgets

The way you and your organisation manage and monitor income and expenditure might not be the same as that of the funder. So to avoid confusion, look out for the following nuances:

### Accounting years

What accounting year do you and your funder base your budgets on? The fiscal year (April to end March), the calendar year, your own organisational accounting year or the project year? In the case of UK government funding you will generally need to present your budget on a quarterly basis over a fiscal and on some occasions a project year as well. If the project has European funding as well you will need to produce the same figures over the course of a calendar year. This can be very confusing and time consuming. The best approach is to estimate your income and expenditure on a weekly basis, so that these figures can be adapted to fit any accounting year

### Units of measurement

When you are budgeting for staff time, you can do so on an hourly or daily basis. Make sure you and your funder are using the same unit of measurement.

## Linking your budget to your accounts

Make sure that your budget is linked, through cost centres and income streams, to your organisation's accounts. Keep all original financial documentation related to the project with your organisation's accounting files. But keep copies of everything in your project files. If you are ever subject to a financial audit by a funder or a professional auditing firm, you will need to have a clear paper trail.

## Match funding

Some funders require you to acquire additional match funding from another source in order to secure their grant. Up to 50% match funding can be required. You might find match funding through a project partner, through another funder or you can contribute staff time from your own organisation – which is now generally considered to be cash match not in kind. Typically, all match funding must be agreed and in place before submitting a final bid.

Follow this link for match funding guidance from the National Lottery - <http://www.lotteryfunding.org.uk/partnership.htm>

## In-kind funding

In-kind funding or contributions in kind are tangible, non-cash contributions to sustaining the project. For example, the free loan of office space or equipment. This must be recorded and evidenced as part of your project budget.

## Full cost recovery

Organisations running projects incur direct project costs and overheads. Historically, funders have only funded direct project costs rather than overheads or core activities. This has meant that many small organisations have been unable to recover the costs on their project work. The government has recently introduced Full Cost Recovery to help grant-givers and receivers to address this problem.

For more information on full cost recovery, visit <http://www.cash-online.org.uk/content/1/56/> or [http://www.financehub.org.uk/uploads/documents/fh\\_full\\_cost\\_recovery\\_Aug06\\_59.pdf](http://www.financehub.org.uk/uploads/documents/fh_full_cost_recovery_Aug06_59.pdf)

There are a range of activities that will enable you to use heritage as a way of facilitating learning amongst older people. Below you can find out about the types of heritage learning activity available and where to find out more about what is involved and the delivery skills required.

## Types of heritage learning

### Reminiscence

Reminiscence activities are about stimulating memories using pictures or objects. These things are effective because they have a historical significance for the participants or alternatively prompt memories because of the way they feel, smell, taste etc.

[http://www.age-exchange.org.uk/about\\_us/index.html](http://www.age-exchange.org.uk/about_us/index.html)

### Oral history

Oral histories are a translation of the past through a series of personal stories. Learning can be built around the telling and recording of personal stories but also around the editing and creation of a finished oral history recording.

See the How To – Record an oral history

<http://www.oralhistory.org.uk/>

### Object-handling

Object-handling is the use of objects to stimulate discussion and exploration of important issues and topics. Object-handling is a good warm-up activity.

<http://www.museums.ucl.ac.uk/research/touch/>

### Inter-generational learning

Inter-generational learning is the bringing together of two generations to learn together and learn about one another. There are opportunities for sharing of skills and knowledge between generations and for building relationships and understanding.

<http://shop.niace.org.uk/thinkcommunity.html>

Live interpretation and museum theatre

Live interpretation is the use of people (i.e. actors, practitioners, interpreters) to bring history and heritage to life. People can act parts (first person interpretation) or they can dress up and represent characters from a particular period of time.

<http://www.heritageinterp.com/language.htm>

<http://www.imtal-europe.net/>

## Guidance on learning and engagement through heritage

**English Heritage** - For general guidance on community engagement through heritage, have a look at:

<http://www.englishheritage.org.uk/server/show/nav.1657>

**Heritage Lottery Fund (HLF)** - Search the HLF website for details of the projects they have supported. It may give you some ideas for activities:

<http://www.hlf.org.uk/ourproject/projectsbyactivity/participation/Pages/index.aspx>

**OR** HLF also publish free downloadable advice toolkits. There is a lot here on community engagement, participation, learning, working with the disabled etc. in a heritage setting:

<http://www.hlf.org.uk/aboutus/Pages/allourpublications.aspx>

## Heritage Learning Training Providers

GEM - [www.gem.org.uk](http://www.gem.org.uk)

Museums Libraries and Archives Council

[www.mla.org.uk](http://www.mla.org.uk)

Museums Association -

[www.museumsassociation.org.uk](http://www.museumsassociation.org.uk)

Association of Heritage Interpretation - [www.ahi.org.uk](http://www.ahi.org.uk)

The regional federations of museums and galleries i.e.

Yorkshire and Humberside, North West, South West etc.

During the SOYH project, we worked with some very frail individuals; some of whom were experiencing the early stages of dementia or other debilitating illnesses. Many of these individuals struggled to comprehend the aims of the project and were unable or even unwilling to decide on the course of their learning or the resource they would produce. This reduced capacity to engage in project activity challenged the SOYH principle of self-directed learning and we found that the decisions about the project's direction were made by the project team interpreting and responding to the participants.

It was very much a 'trial and error' scenario. With one group we had issues that ranged from a couple of individuals who were very agitated due to their medical condition (one of whom kept leaving the room), to those who refused to speak, but still wished to stay and listen to others whose loss of memory was such that they couldn't remember what they had done for a living. Within this group there was very little interaction between the participants, which meant facilitating group discussion or activity was difficult and often inappropriate for the individuals involved. We used two methods to engage the participants:

- Stimulating the group i.e. playing records on an old wind-up gramophone, which caused a lot of smiles and some to break into song; sensory objects, including fresh herbs; and large pictures of objects from their past
- One to one interaction

Due to the restricted capabilities of the group, it was not possible for them to produce a resource that involved practical activity i.e. voice recording or physical activity. Instead the project staff spent time stimulating the memories of participants in key areas and having spent time discussing food and recipes from the participants' past, it was decided that the group would produce a recipe book, with snippets of their stories and photographs of relevant objects. One participant of nearly 100 could clearly remember being a cook at a big house locally, and this was the only story that she ever spoke about. If we tried to ask her about other memories she just returned to her story about being a cook. We therefore worked with her to explore more about this period of her life.

It is important to work with the participants at a level and intensity with which they are comfortable. Even though we were often frustrated at the progress we made with these very frail groups, the staff assured us that they were seeing positive benefits for the individuals involved.

# Example Documents



GEM / AHI / CCML  
SOUNDING OUT YOUR HERITAGE



## PROJECT COORDINATOR

### I. SUMMARY

**Project Coordinator – £17,500 - £20,000 full-time one year contract**

We are seeking a highly motivated, experienced and flexible Project Coordinator to:

- Coordinate an exciting new Group for Education in Museums (GEM) project, *Sounding Out Your Heritage* working with hard-to-reach over-60s in Kent and Medway funded by a £75K grant from the Department for Business, Information and Skills (BIS) Transformation Fund to help kickstart *The Learning Revolution*; and
- lead the administration of the heritage charity Association for Heritage Interpretation (AHI) to help sustain its membership and activities.

The project coordinator may also be involved with other projects and the administration of GEM, and will work from GEM's offices in Gillingham. We would like the successful candidate to start work as soon as possible, and although the contract is initially for one year it is hoped that the post will continue beyond one year.

**Essential:** Excellent project coordination, administrative and IT skills, including experience of Microsoft Outlook, Word, Excel and Access, and the internet; excellent organisational abilities with good attention to detail; excellent interpersonal skills and the ability to work as part of a team and to get on with a wide variety of people; excellent verbal and written communication skills; ability to make efficient and effective use of time, and to plan and prioritise work, occasionally under pressure.

For more details and application information:

GEM (ref TF/PC)  
131 Trafalgar Street, Gillingham, Kent, ME7 4RP.  
Tel: 01634 853424 or  
Email: [office@gem.org.uk](mailto:office@gem.org.uk)

**Closing date:** 12.00, 19 October 2009 (interviews 22 October)

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## 2. INTRODUCTION

Creative Communications (Management) Ltd (CCML) specialises in the administration of membership organisations in the heritage sector and the management of projects. CCML has been carrying out the Group for Education in Museum's (GEM) administration since 2001 and the administration for the Association for Heritage Interpretation (AHI) since 2008.

Both GEM and AHI are membership organisations and are registered as charities. Each organises professional development events, produces publications, and maintains a website. CCML has a full-time chief executive (Dr John Stevenson) who also acts as GEM's director. Fenella Hunt (GEM's deputy director) works in the same office. John Stevenson is also currently chair of the Interim Board for the new Council for Learning Outside the Classroom.

With an increase in workload, we need to recruit a new full-time member of staff to join a small team of staff who work flexibly and undertake a wide range of tasks from GEM's office in Gillingham, Kent. It is possible that the project coordinator may be able to work from home occasionally.

## 3. THE LEARNING REVOLUTION

The White Paper, *The Learning Revolution*, was launched by the Department for Business, Innovation and Skills (BIS) on 23 March 2009 and sets out the Government's strategy for informal adult learning. It recognises the profound importance of informal adult learning to people's lives and our nation's well-being. It reaffirms cross-government commitment to informal learning and sets out how the Government will act as an enabler, capacity builder and connector to maximise the potential benefits.

A key element of this new strategy is the £20 million Transformation Fund which offers funding for innovative informal adult learning projects in England. Across the nation, a diverse array of informal adult learning projects are getting underway, ranging from creative music master classes for people out of work or education, learning adventures for isolated older people and reading opportunities for the over 60s. The projects, many spearheaded by partnerships between public, private and third sector organisations, will help improve mental health, physical well-being, active citizenship and community cohesion, as well as providing a stepping stone towards further learning, qualifications and employment for many people.

To read the Learning Revolution White Paper and to find out more about the Transformation Fund and other key initiatives, visit [http://www.dius.gov.uk/skills/engaging\\_learners/informal\\_adult\\_learning/white\\_paper#](http://www.dius.gov.uk/skills/engaging_learners/informal_adult_learning/white_paper#)

## 4. SOUNDING OUT YOUR HERITAGE

GEM is delighted to have won Government funding bid to help kickstart *The Learning Revolution* in Kent and Medway. We have secured £74,500 from the Government as part of a 'learning for pleasure' innovation spearheaded by the Department for Business, Innovation and Skills (BIS). This grant is from the £20 million Transformation Fund, launched by Government to offer funding for to innovative informal adult learning projects in England. This brings to life *The Learning Revolution*, a White Paper presented to Parliament in March 2009.

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*Sounding Out Your Heritage*, one of over 213 winning projects, will enable hard-to-reach over-60s in Kent and Medway to come together in small groups to explore and shout about their personal, local, national and cultural heritage.

We will provide learning support to hard-to-reach over-60s to help them explore their heritage and produce a resource which will enable others to learn about their heritage too. We will celebrate these resources and make them available throughout Medway and Kent. We will develop these resources in partnership with a number of "seed" groups. We will produce toolkits based on their work which will enable and encourage others to learn and shout about their heritage.

Through these activities and resources we will achieve the following:

- more over-60s in Kent and Medway engaged with learning
- more opportunities for over-60's in Kent and Medway to learn
- greater enthusiasm for and investment in learning stimulated amongst this group
- more opportunities to explore and better understand their own and/or other people's heritage
- wider variety of opportunities to tell others about who they are and what their heritage is
- more community cohesion promoted in Kent and Medway by people finding out about and understanding one another.

By partnering GEM with local media and governmental organisations, the project will create links between learning resources and local community groups. Through the use of websites, broadcasting and technology, the project will contribute to making the informal adult learning infrastructure more flexible and more accessible. By producing toolkits and establishing a model for working with small groups of over-60s, the project will develop informal adult learning practice and increase the chances of independent adult learning.

The *Sounding Out Your Heritage* project will end on 31 March 2010.

#### 5. JOB PURPOSE

- coordinate the exciting new GEM project *Sounding Out Your Heritage* working with hard-to-reach over-60s in Kent funded by a £75K grant from the BIS Transformation Fund;
- be the team leader for the administration of AHI
- undertake the coordination of other projects as required
- help to carry out all administrative tasks required to sustain the memberships, activities and governance of GEM, AHI and any other organisations which CCML may administer;
- help with overseeing and coordinating the activities of CCML's office

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## 6. TASKS

- supporting the Project Manager in the overall co-ordination and development of the project plan
- assisting the Project Manager in maintaining and managing the project budget and liaising with others to make sure correct procurement processes are followed
- maintaining a project plan and producing appropriate regular reports
- monitoring production of project deliverables against the plan, and ensuring quality and consistency is maintained
- maintaining project documentation and archive
- ensuring best project management practice and that lessons learnt are taken forward appropriately
- training others in project related processes as required
- maintaining membership databases (Access); sending out invoices and reminders; liaising with subscription agents; dealing with enquiries
- managing production and distribution of both printed and electronic publications and communications
- managing professional development events such as one day training events, annual residential conferences and study weekends including liaison with presenters, venues, caterers etc and the checking of contracts and invoices
- processing applications for professional development events and maintaining delegate databases (Access), including issuing invoices and reminders, and preparing delegate packs
- managing bursary and award schemes including promotion, logging applications, collating judges' decisions and comments, liaising with winners and organising award ceremonies
- dealing with enquiries by telephone, fax, email and post, and liaising with trustees and others concerning specialist enquiries
- logging post and recording receipts whether by cheque, BACS or card
- maintaining accurate records of income and expenditure using Excel spreadsheets, entering information into bookkeeping software, and producing management accounts
- supplying relevant information to accountants, auditors, legal representatives, Companies House, Charities Commission and other statutory bodies
- providing administrative support to chairs, boards, committees and working groups by arranging meetings, preparing administrative reports, circulating papers and taking notes of meetings
- producing content for publications, websites and email forums
- administering requests for placing of advertisements on websites and in publications, including invoicing
- maintaining stocks of stationery and publications, and supplying as required
- liaising with local groups and collecting and distributing information

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- providing administrative support to the chief executive and other senior staff
- managing the procurement of products and services such as publications, office equipment and supplies, communications, travel, design, accountancy, insurance, legal services, etc
- adhering to current health and safety and other relevant legislation
- undertaking any other duties as may reasonably be required by CCML

The Project Coordinator will be employed by CCML on a full-time basis on an annual salary of between £17,500 and £20,000 per annum depending on experience. The person appointed will be line-managed by John Stevenson but will report to the Project Manager for work on the *Sounding Out Your Heritage* project. The Project Coordinator will work from CCML's offices, although the Project Coordinator will be expected to travel to meetings across the UK occasionally. Some home-working may be possible. Travel and subsistence expenses will be reimbursed according to GEM guidelines.

## 7. PERSON SPECIFICATION

### Essential:

- At least two years' experience of coordinating projects
- Knowledge of project planning and management procedures, practices, and techniques.
- Excellent administrative and IT skills, including good experience of Microsoft Outlook, Word, Excel and Access, and the internet;
- Excellent organisational abilities
- Excellent interpersonal skills and the ability to work as part of a team and to get on with a wide variety of people
- Excellent verbal and written communication skills
- Reliability, accuracy and attention to detail
- Ability to make efficient and effective use of time, and to plan and prioritise work, occasionally under pressure
- Ability and willingness to travel to occasional meetings and events, and to stay overnight if required

### Desirable:

- Knowledge of structured project management techniques
- Experience in financial management, bookkeeping and payroll
- Experience of maintaining office computer systems and skills such as setting up mail merges in Word and writing of queries and reports in Access
- Experience of supporting boards of limited companies or charities including taking of board minutes
- Experience of working in the voluntary sector

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- Experience of working in partnership with non-heritage organisations
- Good experience of Microsoft Office and the internet;
- Experience of working in the voluntary sector
- Interest in learning and interpretation in the heritage sector
- Experience in risk and change management

#### 8. APPLICATION PROCEDURE

Applicants should send a CV and a covering letter outlining their particular skills, experiences and strengths in relation to the post with specific examples (no more than four sides of A4 in total) and their earliest possible start date to:

GEM (ref TF/PM)  
131 Trafalgar Street, Gillingham, Kent, ME7 4RP.  
Tel: 01634 853424 or  
Email: [office@gem.org.uk](mailto:office@gem.org.uk)

Due to the current disruption in postal services we recommend that you send your application by email or by fax, or deliver it by hand to the office.

We will acknowledge the receipt of all applications sent by email, but please send a stamped addressed envelope if you would like an application sent by post to be acknowledged. Please assume your application has been unsuccessful if you do not hear that you have been invited to interview by 21 October.

#### 9. CLOSING DATE: 12.00, 19 OCTOBER 2009

Interviews will be held in Gillingham on 21 October and candidates should be prepared for a formal interview and to undertake some practical tasks – details of which will be given when invited for interview. The successful candidate will commence work as soon as possible.

Please note the interview date of 21 October and try to keep it free if you would like to be interviewed as it is unlikely that we would be able to make alternative arrangements.

Applicants should also include the names and addresses of two referees – one of whom should be your current or most recent employer. We will contact your referees if you are invited to interview. Please let us know if this is not convenient.

Applicants are welcome to telephone Dr John Stevenson on 01634 853424 for an informal discussion about the post before submitting their application.



## SOUNDING OUT YOUR HERITAGE

### PROJECT MANAGER

#### I. SUMMARY

##### **Project Manager – £25,200 (pro rata) full-time six month contract**

We are seeking a highly motivated, experienced Project Manager to deliver an exciting new project *Sounding Out Your Heritage* working with hard-to-reach over-60s in Kent and Medway funded by a £75K grant from the Department for Business, Information and Skills (BIS) Transformation Fund to help kickstart *The Learning Revolution*.

*Sounding Out Your Heritage* will enable hard-to-reach over-60s in Kent and Medway to come together in small groups to explore and shout about their personal, local, national and cultural heritage.

The Project Manager will:

- be responsible for planning the project and ensuring that it is completed successfully, within the given deadline (end March 2010) and agreed budget;
- use their excellent management skills to coordinate the entire project team and also clients and stakeholders;
- have direct experience of working with over-60s as well as proven project management experience and skills.

The Project Manager will work from GEM's offices in Gillingham. We would like the successful candidate to start work as soon as possible.

#### **Essential:**

Experience (preferably at least two years) of managing projects and educational or community outreach work with the over-60s; good working knowledge of project planning and project management procedures, practices, and techniques; good influencing and leadership qualities, and effective team management skills; excellent communication (verbal and written) and interpersonal skills, and the ability to lead and work as part of a team and to get on with a wide variety of people; and ability to make efficient and effective use of time, and to plan and prioritise work, occasionally under pressure.

For more details and application information:

GEM (ref TF/PM), 131 Trafalgar Street, Gillingham, Kent, ME7 4RP.  
Tel: 01634 853424 or Email: [office@gem.org.uk](mailto:office@gem.org.uk)

**Closing date:** 12.00, 19 October 2009 (interviews 21 October)

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## 2. GEM

The Group for Education in Museums (GEM) believes that our heritage provides distinctive opportunities for learning, and aims to make that learning accessible, relevant and enjoyable to all. GEM:

- supports heritage organisations and education practitioners in developing and sharing best practice in heritage learning
- develops and delivers innovative learning projects that contribute to sustainable development in heritage education
- works in partnership with other organisations to contribute to important government agendas and the cultural economy
- advocates the benefits of heritage learning in terms of individual and social welfare

GEM is the UK's leading training and advisory body in heritage education. It aims to develop a professionally updated, innovative and energised workforce that brings learning to the foreground within museums, heritage organisations and the sector as a whole. GEM has built a strong reputation for CPD support. With over 2,000 members and extensive regional, national and international networks, GEM has an excellent track record in providing high quality training and resources which meet demand. Consequently, GEM has now become a leading advocate for heritage education both within the sector and beyond. GEM has been involved in initiatives such as the Learning Outside the Classroom Manifesto and has developed innovative learning projects in partnership with organisations including the Department for Children, Schools and Families; Museums Galleries Scotland; and Museums Archives and Libraries Wales. By combining training and resource development with innovative project work and policy development, GEM is able to constantly improve what it offers and break new ground in heritage education.

GEM is a membership organisation and is registered in England as a charity and a company limited by guarantee. It is governed by a board of trustees, chaired by John Reeve – the other trustees are Katy Archer, Bruce Burford, Jim Butler, Sharon Goddard, Emily Leach, Izzy Mohammed, Nick Winterbotham and Vicky Woollard,

GEM has a director, Dr John Stevenson, a deputy director, Fenella Hunt, and a small admin team who work from GEM's office in Gillingham, Kent. John Stevenson is also currently chair of the Interim Board for the new Council for Learning Outside the Classroom.

The Project Manager will work from GEM's offices, and organise *Sounding Out Your Heritage* events and activities in the local area. The Project Manager may be able to work from home occasionally.

## 3. THE LEARNING REVOLUTION

The White Paper, *The Learning Revolution*, was launched by the Department for Business, Innovation and Skills (BIS) on 23 March 2009 and sets out the Government's strategy for informal adult learning. It recognises the profound importance of informal adult learning to people's lives and our nation's well-being. It reaffirms cross-government commitment to informal learning and sets out how the Government will act as an enabler, capacity builder and connector to maximise the potential benefits.

A key element of this new strategy is the £20 million Transformation Fund which offers funding for innovative informal adult learning projects in England. Across the nation, a diverse array of

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informal adult learning projects are getting underway, ranging from creative music master classes for people out of work or education, learning adventures for isolated older people and reading opportunities for the over 60s. The projects, many spearheaded by partnerships between public, private and third sector organisations, will help improve mental health, physical well-being, active citizenship and community cohesion, as well as providing a stepping stone towards further learning, qualifications and employment for many people.

To read the *Learning Revolution* White Paper and to find out more about the Transformation Fund and other key initiatives, visit [http://www.dius.gov.uk/skills/engaging\\_learners/informal\\_adult\\_learning/white\\_paper#](http://www.dius.gov.uk/skills/engaging_learners/informal_adult_learning/white_paper#)

#### 4. SOUNDING OUT YOUR HERITAGE

GEM is delighted to have won Government funding bid to help kickstart *The Learning Revolution* in Kent and Medway. We have secured £74,500 from the Government as part of a 'learning for pleasure' innovation spearheaded by the Department for Business, Innovation and Skills (BIS). This grant is from the £20 million Transformation Fund, launched by Government to offer funding for to innovative informal adult learning projects in England. This brings to life *The Learning Revolution*, a White Paper presented to Parliament in March 2009.

*Sounding Out Your Heritage*, one of over 213 winning projects, will enable hard-to-reach over-60s in Kent and Medway to come together in small groups to explore and shout about their personal, local, national and cultural heritage.

We will provide learning support to hard-to-reach over-60s to help them explore their heritage and produce a resource which will enable others to learn about their heritage too. We will celebrate these resources and make them available throughout Medway and Kent. We will develop these resources in partnership with a number of "seed" groups. We will produce toolkits based on their work which will enable and encourage others to learn and shout about their heritage.

Through these activities and resources we will achieve the following:

- more over-60s in Kent and Medway engaged with learning
- more opportunities for over-60s in Kent and Medway to learn
- greater enthusiasm for and investment in learning stimulated amongst this group
- more opportunities to explore and better understand their own and/or other people's heritage
- wider variety of opportunities to tell others about who they are and what their heritage is
- more community cohesion promoted in Kent and Medway by people finding out about and understanding one another.

By partnering with local media and governmental organisations, the project will create links between learning resources and local community groups. Through the use of websites, broadcasting and technology, the project will contribute to making the informal adult learning infrastructure more flexible and more accessible. By producing toolkits and establishing a model for working with small groups of over-60s, the project will develop informal adult learning practice and increase the chances of independent adult learning.

The main outputs of the project will be products and resources which will encourage and enable further learning about personal, local, national and cultural heritage.

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There will be six "seed" groups of learners which will continue to meet and learn and provide the template for the development of future learning groups.

Toolkits will be developed and made available locally and nationally to support other groups or individuals in engaging with heritage learning.

Other outputs include:

- advocacy and publicity materials promoting the work of the project and its objectives.
- project report detailing the implementation of the project and highlighting lessons learned.
- evaluation report measuring the impact of the project.
- establishment of partnerships and models for working that are sustainable. These working relationships may continue beyond the life of the project and the models of working may be transferred across into many other locations and contexts.

#### 5. MAIN JOB PURPOSE

- be responsible for the overall direction, coordination, implementation, execution, control and completion of the exciting new GEM project *Sounding Out Your Heritage* working with hard-to-reach over-60s in Kent funded by a £75K grant from the BIS Transformation Fund.

#### 6. MAIN TASKS & RESPONSIBILITIES

- lead the planning and implementation of the *Sounding Out Your Heritage* project
- facilitate the definition of the project's scope, goals and deliverables
- define project tasks and resource requirements
- develop project plan
- manage project coordinator (who is also employed on other tasks working to a different manager)
- assemble and manage project staff and freelancers
- manage project budget
- manage project resource allocation
- plan and schedule project timelines
- track project deliverables using appropriate tools and quality assurance
- manage risks and issues
- develop and implement an equality, diversity and inclusion policy for the project
- constantly monitor and report on progress of the project to all stakeholders
- present reports defining project progress, problems and solutions
- implement and manage project changes and interventions to achieve project outputs
- set up and run project steering group
- produce and distribute publicity pack
- establish working partnerships with local media and government organisations

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- recruit 10 learners for each of the six "seed" groups
- consult with each seed group, establish learning objectives for each and organise suitable freelancers to deliver each group's agreed learning programme
- organise and produce "toolkits" from the work of each group
- ensure that the work of each group is "sounded out" through local and wider media
- organise the hosting of resources in local heritage organisations or on-line
- organise event celebrating achievements of the project's learners
- evaluation throughout the project and production of final evaluation report
- production of final project report
- adhere to current health and safety and other relevant legislation
- undertake any other project management duties as may reasonably be required by GEM

The Project Manager will be employed by GEM on a full-time six month contract for a monthly salary of £2,100 (i.e. £25,200 pa pro rata). The person appointed will report to GEM's director, John Stevenson, and will work from GEM's offices, although the Project Manager will be expected to travel to meetings throughout Kent, and occasionally across the UK. Some home-working may be possible. Travel and subsistence expenses will be reimbursed according to GEM guidelines.

## 7. PERSON SPECIFICATION

### Essential:

- Experience of managing projects (preferably at least two years)
- Experience of educational or community outreach work preferably with the over-60s
- Good working knowledge of project planning and project management procedures, practices, and techniques.
- Good influencing and leadership qualities, and effective team management skills
- Ability to resolve conflicting situations and effective problem solving skills
- Excellent communication (verbal and written) and interpersonal skills, and the ability to lead and work as part of a team and to get on with a wide variety of people
- Good financial management skills
- Reliability, accuracy and attention to detail
- Ability to make efficient and effective use of time, and to plan and prioritise work, occasionally under pressure
- Ability and willingness to travel to occasional meetings and events, and to stay overnight if required
- Excellent administrative and IT skills

### Desirable:

- Knowledge of structured project management techniques
- Wide experience of providing informal adult education activities in the heritage sector

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- Experience of working in partnership with non-heritage organisations
- Good experience of Microsoft Office and the internet;
- Experience of working in the voluntary sector
- Interest in learning and interpretation in the heritage sector
- Experience in risk and change management

#### 8. APPLICATION PROCEDURE

Applicants should send a CV and a covering letter outlining their particular skills, experiences and strengths in relation to the post with specific examples (no more than four sides of A4 in total) and their earliest possible start date to:

GEM (ref TF/PM)  
131 Trafalgar Street, Gillingham, Kent, ME7 4RP.  
Tel: 01634 853424 or  
Email: [office@gem.org.uk](mailto:office@gem.org.uk)

Due to the current disruption in postal services we recommend that you send your application by email or by fax, or deliver it by hand to the office.

We will acknowledge the receipt of all applications sent by email, but please send a stamped addressed envelope if you would like an application sent by post to be acknowledged. Please assume your application has been unsuccessful if you do not hear that you have been invited to interview by 21 October.

#### 9. CLOSING DATE: 12.00, 19 OCTOBER 2009

Interviews will be held in Gillingham on 21 October and candidates should be prepared for a formal interview and to undertake some practical tasks – details of which will be given when invited for interview. The successful candidate will commence work as soon as possible.

Please note the interview date of 21 October and try to keep it free if you would like to be interviewed as it is unlikely that we would be able to make alternative arrangements.

Applicants should also include the names and addresses of two referees – one of whom should be your current or most recent employer. We will contact your referees if you are invited to interview. Please let us know if this is not convenient.

Applicants are welcome to telephone Dr John Stevenson on 01634 853424 for an informal discussion about the post before submitting their application.



SOYH\_1.1



## Terms of reference for the Sounding Out Your Heritage Advisory Group (SOYHAG)

### Role

1. The role of the Advisory Group is:
  - a. To encourage and support GEM in achieving the key aims of the *Sounding Out Your Heritage* project;
  - b. To provide strategic support;
  - c. Assess forward plans;
  - d. Review progress;
  - e. Make recommendations for future work;
  - f. Respond to documents and issues electronically between meetings.

### Chair

2. The Chair of the Advisory Group shall be the Chair of GEM. In his or her absence the chair shall normally be taken by the Director of GEM.

### Attendance at Meetings

3. Members of the Advisory Group shall be appointed by the Chair with the advice of the Director and Project Manager.
4. The Advisory Group shall have not fewer than 4 and not more than 9 members (including any observers and staff).

### Frequency and Venue of Meetings

5. The Advisory Group will normally meet on a bi-monthly basis for the duration of the project.
  - a. The dates for the meetings will be confirmed but the first meeting is anticipated to take place in early December 2009.
  - b. The anticipated length of each meeting is expected to be no longer than two and a half hours, starting at midday and including lunch.
  - c. The venue will be at GEM's offices in Gillingham.

### Composition of Advisory Group

6. The advisory group will include:
  - a. A representative of local users (e.g. Age Concern)
  - b. A representative from a local heritage provider
  - c. A representative from Adult Education
  - d. A representative from the local media
  - e. The Chair of GEM
  - f. The Project Manager
  - g. The Project Co-ordinator

### Expenses

7. Advisory Group members are able to claim reasonable travel expenses to planned meetings.



# Join us for mince pies, museums and holiday cheer!



Talk about Christmas past and enjoy some holiday treats with *Sounding Out Your Heritage* and Canterbury Museums & Galleries.

Wednesday 16 December  
2.30 - 4.30 pm  
Cranmer House



For more information, please contact Kim Klug, project coordinator:  
GEM, 54 Balmoral Road, Gillingham, Kent, ME7 4PG  
Tel/Fax: 01634 853424 Email: [kimklug@gem.org.uk](mailto:kimklug@gem.org.uk) Website: [www.gem.org.uk](http://www.gem.org.uk)



## Sounding Out Your Heritage

A new heritage project for the over-60s in Kent and Medway



# Taster Session



Join us for mince pies, museums  
and holiday cheer!

- Do you like talking about the past?
- Would you like to record your memories in fun ways?
- Are there museums you would like to visit?
- Would you like to learn something new?
- Are you interested in local history, old photos or recipes?
- Do you fancy making a short video or a small exhibition?

If so, come to our Taster Session:

**Wednesday 16 December**  
2.30 - 4.30 pm  
Cranmer House



It's an ideal opportunity to celebrate your past, culture and traditions  
with *Sounding Out Your Heritage*!

For more information, please contact Kim Klug, project coordinator:

GEM, 54 Balmoral Road, Gillingham, Kent, ME7 4PG

Tel/Fax: 01634 853424 Email: [kimklug@gem.org.uk](mailto:kimklug@gem.org.uk) Website: [www.gem.org.uk](http://www.gem.org.uk)



**The Group for Education in Museums (GEM) is kick starting The Learning Revolution in Kent and Medway with the Sounding Out Your Heritage project.**

*Sounding Out Your Heritage* is one of over 213 winning projects that was recently awarded funding as part of a 'learning for pleasure' innovation spearheaded by the Department for Business, Innovation and Skills (BIS). Through *Sounding Out Your Heritage* GEM is enabling over 60s in Kent to come together to explore, discover and shout about their personal, local, national and cultural heritage.

*Sounding Out Your Heritage* will support you as you explore your heritage, and create a community resource during January and February 2010. The Cranmer House project will work closely with Canterbury Museums and Galleries.

Participants will have the opportunity to take part in museum visits and create a resource that will be used to educate and engage future museum visitors. *Sounding Out Your Heritage* will enable you to share and celebrate your social and historical knowledge while making a valuable contribution to life in Canterbury and Kent.

*Sounding Out Your Heritage* is just starting. To find out how you can get involved, attend the **Taster Session on Wednesday 16 December, 2.30 - 4.30 pm at Cranmer House.**

For more information about *Sounding Out Your Heritage* contact Kim Klug (email: [kimklug@gem.org.uk](mailto:kimklug@gem.org.uk); telephone: 01634 853424).

GEM is a registered charity number 1090995.



Sounding Out Your Heritage  
REGISTRATION FORM

Session date: \_\_\_\_\_ Venue: \_\_\_\_\_

LEARNER DETAILS

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Town: \_\_\_\_\_ Postcode: \_\_\_\_\_  
Tel: \_\_\_\_\_ Email: \_\_\_\_\_

Please tick the applicable boxes:

- Male       Female
- Age group:     60-74 years     75-89 years     90+ years

Do you consider yourself to have a learning difficulty, disability or health problem?

- Yes       No       Prefer not to say

If yes, please specify: \_\_\_\_\_

If you do not disclose your learning difficulty, disability or health problem, we may not be able to provide you with specific arrangements in accordance with the Disability Discrimination Act.

In the last year, have you been involved in the following activities (please tick all that apply):

- Social/recreational activities (social clubs, sports clubs, gym or exercise classes)
- Leisure activities (education, arts, music groups or evening classes)
- Frequent contact with others (more than three times per week)
- Social support (strong social contacts when in need)
- Societal involvement (political party, trade union, environmental groups, tenants, resident groups or neighbourhood watch, church or other religious or charitable associations)
- Cultural activities (visit a museum or art gallery, attend the theatre or a concert)



**ETHNICITY (please tick one of the boxes)**

**Asian or Asian British**

- Bangladeshi
- Indian
- Pakistani
- Any other Asian background
  
- Chinese

**White**

- British
- Irish
- Any other White background

**Other**

- Any other Ethnic background

**Black or Black British**

- African
- Caribbean
- Any other Black background

**Mixed**

- White and Asian
- White and Black African
- White and Black Caribbean
- Any other Mixed background

- Prefer not to answer

**EMPLOYMENT STATUS**

- Currently in paid work / employed
- Not in paid work

- Currently in paid work / self employed
- In full time education

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**NOTES**

The information you provide will be passed to the Department of Business, Innovation and skills (BIS). BIS is responsible for funding, planning and encouraging education and training for young people and adults in England and is registered under the Data Protection Act 1998. The information you provide will only be shared with others for the purpose of administration, statistical and research purposes. At no time will your personal information be used for marketing or sales purposes.

Please note that photographs taken during these sessions may be used in displays and on publicity materials.

For more information, please contact Kim Klug, project coordinator:

GEM, 54 Balmoral Road Gillingham, Kent, ME7 4PG  
Tel/Fax: 01634 853424; Email: kimklug@gem.org.uk; Website: www.gem.org.uk

GEM is a registered charity number 1090995 and a company limited by guarantee number 4149246.  
Registered office: Primrose House, 193 Gillingham Road, Gillingham, Kent, ME7 4EP.

**Make Your Own Notes**

Make Your Own Notes

*"Sounding Out Your Heritage is all about getting over 60s together in small groups to explore times gone by and record their personal stories. Working together over a number of weeks, participants made some fantastic resources: story books, audio CDs, leaflets, posters, a memory box and a sensory quilt."*

*Dr John Stevenson, GEM director*

*"It was great. I wish we could do something like that every week. It has been something to look forward to."*

*Iris Bolton, Cranmer House*

*"I can't believe my mum did this. It's great! She didn't even tell me she was doing this project until she asked me to come to the celebration event. It's been really good for her."*

*Daughter of Margaret McIntosh*

*"You live with all these people and just don't know half of what they have done all their lives."*

*Alvina Bird, Windsor House*

*"I enjoyed learning about photography. Tim was very good. We all learned so much."*

*Rita Grieves, Snowdown Court*

*"It's hugely beneficial for museums. It's a new audience for us working with older people in residential homes. The secret is to go back and to keep going back and to build that relationship."*

*Martin Crowther, education manager*

*"It keeps the mind active, it keeps people involved, it gets people together to talk about things rather than just sitting around and perhaps doing nothing. So I think it's been a real benefit."*

*Adrian Bray, supported housing manager*

*"I have been developing and managing projects for more than 15 years, and I think the Sounding Out Your Heritage project has probably been one of the best experiences of my career."*

*Chrissy Stower, project manager*

*"Thank you for making the whole experience worthwhile and enjoyable, all involved really enjoyed it."*

*Nicky Pett, home manager*

## CREDITS

GEM thanks Abbeyfield Kent Society, Canterbury City Council, Canterbury Museums & Galleries Services, Royal Engineers Museum, Sevenoaks Museum and Southern Housing Group for their help with *Sounding Out Your Heritage*.

GEM also thanks all the participants for their enthusiasm, commitment and good humour which made the project such an enjoyable success.

GEM's *Sounding Out Your Heritage* project was funded by the Department for Business, Innovation and Skills through the Transformation Fund.

Photography by Tim Mitchell

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