The Impact of HLF Funding for Curriculum-linked Learning for 5–19 year olds

Final Evaluation Report

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Executive Summary

Introduction

The Heritage Lottery Fund (HLF) distributes money raised by the National Lottery to support all aspects of heritage. Its Strategic Plan 2002–2007 identifies four broad aims: to conserve and enhance the UK's diverse heritage; to encourage more people to be involved in and make decisions about their heritage; to ensure that everyone can learn about, have access to, and enjoy their heritage; and to bring about a more equitable spread of grants across the UK. This report presents results from a 12-month study of fifty of HLF funded projects that have educational aims and assesses their impact on curriculum-linked learning for 5–19 year olds throughout the United Kingdom. Evidence was collected from questionnaires completed by project organisers in a sample of 50 HLF-funded projects and also from organisers, teachers, other adults and pupils/students who participated in eight case study projects. At the time the research was undertaken, the survey sample represented just under half of the total number of HLF funded education projects that related directly to the formal curriculum for children and young people. These projects illustrate educational practices in the five areas of heritage covered by the HLF, ie Historic buildings and monuments; Industrial, maritime and transport collections and sites; Intangible heritage; Land and biodiversity; and Museums, galleries, historic library collections and archives. The research was funded by the HLF and undertaken by the Scottish Council for Research (SCRE) Centre, University of Glasgow, between February 2004 and March 2005.

Key findings and implications

The research focused on three broad areas within the 50 HLF funded education projects: delivery methods; resources including staffing, finance and sustainability; and outputs and outcomes. The key findings for each are presented below and some implications are indicated.

Delivery Methods

Key findings

Evidence from the survey and case studies shows that heritage education was organised and delivered in a variety of ways in the sample of 50 HLF-funded education projects. A range of learning and teaching approaches has been developed and these are used with children/young people in different sectors of education (primary, secondary and further education) and also for continuing professional development for teachers and artists. Specifically:

- Most of the 50 HLF-funded projects focused heritage education on more than one educational sector: 84% (42 of the 50) focused on primary schools; 78% (39 of the 50) on secondary schools; 44% (22 of the 50) on FE.
- Thirty-eight per cent(38%) (19 out of 50) provided continuing professional development for teachers.

- Although heritage education was reported to be linked to all areas of the curriculum, history (including local history), art and design, science and geography were the subjects most frequently mentioned by the 50 HLF-funded projects.
- Short sessions were the most frequently mentioned way of delivering activities (38 of the 50, 76%), followed by work with target groups (31 of the 50, 62%). Only a third (32%) of the 50 projects worked long-term with one class.
- Internet working (by using electronic materials developed by projects and also resources available on the internet) was more common with primary schools (8 of the 50, 20% of those projects catering for primary pupils) than with secondary schools (7 of the 50, 18% of projects for secondary pupils). Only one project of the 50 (5% of projects catering for FE) used the Internet with FE students, and only one for teacher training (similarly, 5% of projects catering for teacher training).
- Thirty-one of the 50 projects (62%) provided information, such as pre-visit notes, to teachers in advance of school visits to heritage centres or sites.
- The 50 projects offered a variety of educational spaces in which pupils could learn: 74% (37 of the 50) had space suitable for informal learning, 66% (33 of the 50) for practical work, 14% (7 of the 50) had classrooms, and 22% (11 of the 50) operated with combined educational spaces.
- Transport to the 50 projects varied: the most commonly reported mode was coach/minibus (34 of the 50, 68%) usually organised by the participating schools.
- Most of the 50 projects operated either formal or informal partnerships with a variety of other organisations: partners included government departments and agencies, local authorities, museums, universities, schools, and other charities or societies.
- The 50 projects employed a variety of ways of measuring the success of their activities and resources: *hands-on-access to resources* was the most frequently used activity (34 of the 50, 68%).

Implications

Given the range of heritage education projects within the 50 sample projects and the variety of their aims, it might be entirely appropriate that numerous ways of organising and delivering educational activities have been developed. However, typical methods involved partnership working to deliver short sessions offering *Hands-on-access to resources* to primary school pupils linked with history, art and design, science and geography. We think that project organisers should be encouraged to consider other ways of delivering activities and other areas of the curriculum, to include further education, the use of the Internet and continuing professional development for teachers so that the full range of delivery methods is covered.

Resources including staffing, finance and sustainability

Key findings

As the size of the 50 HLF-funded projects varied greatly, with grants awarded by HLF ranging from £7,000 to over £1 million, then the amount of resources, the number of staff and available finances also varied across projects.

- Smaller projects tended not to maintain separate educational project accounts but incorporated them into the audited accounts of their organisation.
- The major indicator of success cited by the 50 project organisers was increase in take-up of one form or another, such as take up by schools, number of pupil visits, sessions delivered. Marketing to increase income seemed to be relatively under-developed.
- Financial sustainability was rarely mentioned as an indicator of success by the 50 organisers, but did appear more frequently as an aspect that they thought could be improved.
- The 50 projects had established partnerships with a wide variety of agencies and charities. However, some reported that partnership working had been harder to manage than they had anticipated, although it was often cited as a factor that helped the project.
- Similarly, some of the 50 project organisers indicated that staff skills had not always been as required, but skilled staff were frequently cited as critical to the project's achievements.
- The majority of the 50 projects (36 of the 50; 72%) reported that they had experienced no difficulties recruiting and retaining staff, but 11 of the 50 (22%) had. Case study informants believed that this was related the deleterious effects of employing staff on lower pay scales and/or fixed-term contracts.
- Two schools of thought about the role of teachers in relation to the heritage education projects emerged from the 50 project organisers. While all agreed teachers should be involved in planning the project, several project organisers thought that teachers needed to be taught how to be more autonomous rather than expecting project staff to do everything for the group.
- The 50 project organisers expressed a range of views about sustainability of HLF-funded projects: most were optimistic. Many respondents assumed that the project would be mainstreamed into the museum or local authority's budget; however, we have little evidence to support this optimism.
- The 50 project organisers expressed both positive and negative views about new avenues which had resulted from HLF-funded projects. The most positive perceived the HLF-funded projects as pilots for future development of ways or working with new or different client groups, resources or Key Stages, which could be developed if new funding becomes available. The negative ones reported that staff had already been made redundant because no new funding had been forthcoming.

Implications

Given the variety of project aims and the general lack of clarity about the purpose of marketing, the definition of sustainability and methods of evaluation to emerge from this research, we think that HLF might wish to offer advice to applicants on the business planning process and develop a template for evaluation. This would not only help projects which are receiving small grants and may not have the necessary financial/managerial expertise in-house, but it would also facilitate HLF's own evaluation process.

Outputs and outcomes

Key findings

The 50 project organisers identified a range of outputs from their HLF-funded projects. Outputs were defined as educational activities, eg workshops, seminars, role-play, resources and materials, such as loan boxes, worksheets, and web-based resources; and Outcomes as changes in children/young people's knowledge, skills, attitudes or values as a consequence of participating in heritage education.

- The most commonly mentioned outputs from the 50 HLF-funded projects were *Hands-on access to resources* (34 of the 50, 68%); *Pre-visit notes for teachers* (31 of the 50, 62%), and *Outreach services to schools* (30 of the 50, 60%).
- Most of the 50 projects elicit feedback of some sort from participants, although the methods used vary widely depending on the type of project. The extent to which they have established success criteria depends on the expertise of project management.
- Four methods were rated 'successful' or 'very successful' by over 90% of the projects using them. These were: *Hands on access to resources/materials* (32 of the 34, 94%); *Printed learning materials for children/young people* (30 of the 32, 94%); *Pre-visit notes for teachers* (28 of the 31, 90%) and *Outreach services to schools* (27 of the 30, 90%).
- It is difficult to find evidence of educational outcomes (defined as changes in the knowledge, skills or attitudes of those who participated in heritage education) partly because of the short duration of some of the activities and also because educational outcomes are influenced by numerous factors.
- There was, however, evidence from the eight case studies that HLF-funded projects were impacting on pupils' curriculum-linked knowledge, particularly in history, and also their skills and attitudes. Typically pupils knew more about how people lived and worked in the past as a consequence of participating in an HLF-funded project. This knowledge was, however, often very localised (eg Case Studies 1, 2, 5, 6, 8) but some pupils also gained an international perspective on the heritage of other countries (eg in Case Studies 3 and 4).

- Some curriculum-linked knowledge gained from the 50 projects was issue-based (eg sustainable development in Case 7); whereas other projects enriched curriculum learning in history, art and design, geography, environmental studies, science and maths.
- The 50 HLF-funded projects seemed to be particularly successful in improving pupils' cross-curricular skills. Teachers reported improvements in pupils' literacy, numeracy, observation, thinking skills, group work and motor skills.
- There was evidence that participating in HLF-funded projects impacted on pupils' attitudes. Pupils enjoyed the experiences of visiting heritage centres or sites, and also were enthusiastic about working with heritage professionals. Teachers also reported improvements in pupils' behaviour and self-confidence.
- Teachers also thought that their own skills and knowledge of various heritage areas increased from contact with HLF-funded projects, as did their confidence to incorporate new ideas into their teaching, especially in expressive arts.
- The introduction of parents and other members of the community to areas of heritage was an unintended benefit of some HLF-funded projects (eg museums in Case Study 2; other cultures in Case Study 4; nature trails in Case Study 5; and built heritage trails in Case Study 8).

Implications

Although a range of educational outputs and outcomes emerged from the 50 HLF funded education projects, it was difficult to link participation in heritage education activities to improvements in pupils' knowledge in particular subjects/levels of the curriculum. Overall, the evidence of changes in pupils' attitudes, particularly in their behaviour and enthusiasm, was much stronger. We think that projects might benefit from establishing closer links to curriculum areas/levels in their project applications and working more closely with teachers to establish areas of need.

Conclusions

HLF funding was being used in numerous creative ways within the 50 sample projects, to offer pupils educational opportunities based upon HLF's five heritage areas. The degree to which each project was successful in impacting on curriculum-linked learning was to a certain extent dependent upon the particular combination of idiosyncratic factors present within that project: the skills and enthusiasm of staff, the resources available to them, and their established networks varied enormously. However, from the evidence we think that certain factors increase the likelihood of a heritage project impacting successfully on curriculum-linked learning. These include:

- *A strong idea*: the starting point for successful projects (exemplified in Case Studies 3, 4, 7 and 8) was usually a strong idea that was capable of being developed into a sustained educational theme which linked to what schools were trying to achieve for their pupils. Case Study 3 concentrated on personal testimony; Case Study 4 on Chinese cultural heritage; Case Study 7 on sustainable development; and Case Study 8 on the local historic built environment. These strong ideas not only provided a focus for project organisers, making it easier for them to manage, but also created a more direct link with areas and subjects in the school curriculum.
- *A clear link between the heritage resource and the curriculum*: Although we accept that children and young people can appreciate and gain pleasure and develop affectively from heritage resources by seeing, touching or hearing about cultural artefacts, we think that these should be carefully chosen so that they link directly to areas of the curriculum and support the development of a strong idea.
- *A strong partnership between heritage organisations and schools*: All 50 HLF funded projects reported that they worked in partnership with other organisations, typically citing other heritage organisations or agencies. Ironically, most believed that partnerships both increased the success of projects but also contributed to their failure if they were not managed well. We formed the view that projects which worked in partnership with schools were more successful in achieving their educational outcomes than those which established partnerships with other agencies or museums in the heritage sector and offered schools an already developed 'menu' of heritage activities. Joint planning and communication with teachers are key to success. Other heritage partners may increase the level of resources and access available to the HLF-funded projects, but this may only exacerbate the problem of embedding heritage into curricular learning if the essential links with schools are under-developed.
- *Enthusiastic staff who have high quality skills and knowledge:* All of the 50 projects stressed the importance of being able to draw on the skills and knowledge of well-qualified, enthusiastic staff. Case Study 4 in particular attributed its success to the arts management expertise of project managers combined with the artistic talents of the various artists that pupils and teachers were able to recognise. Some project organisers were concerned that fixed-term contracts not only demotivated staff but also inhibited capacity building in the heritage sector. From the case studies, we formed the opinion that projects which could draw on the expertise of heritage professionals and had access to staff with teaching skills (eg Case Studies 2, 4, 5, 7 and 8) were better able to tailor their efforts for maximum impact on the formal curriculum.
- *Outreach work (ie working beyond the confines of museums, galleries, historic sites or national parks):* For many of the HLF-funded projects the starting point appears to have been a particular museum, gallery, historic site, or national park which the project organisers wished to make available

to schools. We do not under-estimate the value of these new experiences for children and young people. However, the dangers inherent in this approach is that success becomes defined in terms of attendance figures (ie the number of pupil/visits per week), which diverts attention from educational outcomes and teachers are also expected to make the connections to the curriculum through pre- and post-visit work in the classroom. We think that projects based on outreach work with schools (eg Case Studies 4, 5, 7 and 8) in which heritage professionals and teachers worked collaboratively produced outputs which were better integrated into curriculum-linked learning than those which were based on heritage buildings or historic sites. Transference of learning from the visit to the museum, gallery or historic site to the curriculum was, therefore, not a problem.

- *Experiential learning*: *Hands-on activities* was identified by most survey respondents as the most successful activity offered by 34 of the 50 HLF-funded projects. This is confirmed by case study informants, teachers and pupils. We conclude that projects which offered pupils the opportunities to learn experientially, rather than aiming to improve their theoretical knowledge, were enjoyed more by pupils, and therefore were more likely to have a lasting effect on what pupils think and feel about heritage. Although the published literature suggests that constructivist approaches to heritage education in which children/young people are encouraged to develop their own meanings for heritage sites and artefacts are successful, it was difficult to detect any evidence from this study that project organisers were using such an approach. It would require heritage professionals asking not only 'What have you learnt today?' but also and 'What does it mean to you?' We did, however, see excellent examples of experiential learning, eg. Case Studies 1, 6 and 8, in which children were seeing, touching, researching, analysing, interpreting, drawing, painting, dancing, writing about and generally participating in heritage education linked to curriculum topics. These have the potential to develop the three domains of learning: cognitive, affective and psychomotor.

- *School-based INSET*: Nineteen of the 50 HLF funded projects indicated that they offered teachers continuing professional development. Typically, this took the form of teachers' packs and/or formal CPD courses. Some informants (eg Case Studies 4 and 8) mentioned that these were organised in conjunction with LEA advisors, and Case Study 4 also charged teachers and artists for CPD. A very strong case can be made for developing teachers' professional knowledge and skills in the heritage areas further. Some of the participating teachers pointed out how little time is devoted to this topic during initial teacher training. However, from the case studies we observed in which teachers worked alongside artists or heritage professionals (Case Studies 4, 5, 7 and 8) learning experientially rather than attending formal CPD courses, teachers appeared more confident about

integrating what they had learnt into their teaching practices, especially in the expressive arts.

- *Support from headteachers and LEA advisors:* A number of informants indicated that their projects were supported by LEA advisors and/or headteachers. Headteachers in Case Studies 4, 7 and 8 all supported the heritage education projects. Case Study 8 operated with very well established contacts with the Education and Library Boards and Case Study 4 worked closely with LEA education advisors. One headteacher (Case Study 4) thought that although the maxi residency took up a lot of school time, the 'spin off' benefits for the whole school were worth the investment. We think that HLF projects are more likely to have a lasting impact in schools in which LEA advisors and headteachers support the heritage partnerships and create an ethos in which staff are encouraged to participate and to share what they have learnt with other staff.
- *Joint monitoring and evaluation*: Most of the 50 HLF-funded projects received feedback on their activities from participants. Implicit in soliciting feedback is a willingness to modify and develop the projects further to meet the needs of participants. One project organiser reported modifying project activities by reducing the time allocated to sessions and the amount of detail on worksheets. We think that regular joint monitoring and evaluation between project organisers and teachers using agreed indicators of success would increase the chances of HLF-funded projects improving pupils' curricular knowledge and cross-curricular skills and attitudes. Further guidance on this can be found in two publications: *What Did You Learn at the Museum Today?* (Hooper-Greenhill *et al*, MLA, 2004) and *Inspiring learning for All* (MLA, 2004) which provides a framework for outcomes based education.

1: Introduction

1.1 Background to the evaluation

In 1994, when heritage was identified as one of the five lottery good causes, the only agency which covered the whole of heritage for the whole of the UK was the National Heritage Memorial Fund. Established in 1980 as a memorial to those who had given their lives for the UK, it became the parent body for the Heritage Lottery Fund (HLF). In its first few years HLF concentrated on major capital investment in heritage assets such as those managed by wildlife trusts and museums. In 1998 new policy directions from the Department for Media Culture and Sport asked HLF to, among other things, take into account improving access, sustainable development, the involvement of children and young people, and reducing social and economic deprivation.

HLF's current strategic plan[1] has four aims:

- To encourage more people to be involved in and make decisions about their heritage
- To conserve and enhance the UK's diverse heritage
- To ensure that everyone can learn about, have access to and enjoy their heritage; and
- To bring about a more equitable spread of grants across the UK.

These aims form the background to a study of the impact of Heritage Lottery Fund funding on curriculum-linked learning for 5–19 year-olds in schools and colleges in England, Wales, Scotland and Northern Ireland undertaken by the Scottish Council for Research in Education (SCRE) Centre in Glasgow University. The evaluation was commissioned by the Heritage Lottery Fund in February 2004, and this is the final report of that study, presented in March 2005 and revised in June 2005. The report brings together a review of both published and unpublished sources, a scoping study, an interim report and findings from the case study projects visited during the final stage of the research in order to evaluate the impact of Heritage Lottery Fund projects on the formal learning of pupils and young people.

1.2 Aims

The overall aim of the evaluation is to assess the impact of HLF funding in a sample of curriculum-linked projects on the formal learning of 5–19 year-old learners, teachers, and schools/colleges within the primary, secondary and post-16 sectors in England, Wales, Scotland and Northern Ireland.

[1] *Broadening the Horizons of Heritage, The Heritage Lottery Fund Strategic Plan 2002–2007* available to download from www.hlf.org.uk.

1.3 Definitions

As would be expected in an evaluation based on so many different sources of information (ie gathered from previously published research, questionnaires, interviews and observations from various countries, covering different aspects of heritage, and linked to three main sectors of education), 'heritage' is defined in many different ways. Terms such as 'culture' and 'heritage' are used by some as synonyms. It is also not clear when 'the arts' becomes 'heritage' and when it remains an expression of contemporary culture; or even whether contemporary culture has developed out of, and is a reflection of, our heritage. Some seem to locate 'heritage' almost exclusively within buildings (such as museums, galleries, libraries, collections and sites) to which, more recently, 'natural heritage' (in the form of the countryside, land use and biodiversity) has been added. Throughout this report we use 'heritage' in two ways. Firstly, we accept that 'heritage' may be defined conservatively to mean the physical remains of our collective past, and these examples are usually places which school parties can visit. However, we also wish to include examples of 'heritage' more widely defined to mean that which has been passed on from the past in an oral form through language, myths, stories, dance, music, and also through ways of behaving and using the environment which may help us now and in the future. This study was concerned with both aspects of 'heritage' as the HLF uses the broadest definition of heritage (HLF, 2004)

1.4. Research questions

The evaluation focused on three areas of investigation: the delivery methods employed by HLF-funded education projects; the resources used; and the outputs, outcomes and sustainability of each. The research questions for each are specified below.

1.4.1 Pros and cons of delivery methods

- How is heritage learning organised in each of the sample project sites?
- What methods and models have been used? Do these include short sessions, long-term work with one class, or developing classroom teachers' skills?
- Are elements of heritage learning additional to, or embedded within, the curriculum?
- What teaching approaches have been developed (eg loan boxes, worksheets, tours and talks, practical art and design, performance, investigative and scientific, role play, creative and other types of interactivity), and how effective do stakeholders think these are?
- What learning resources are most valued by different stakeholders?
- Can the different ways of learning be grouped into a meaningful typology?

1.4.2 Issues of resources and logistics

– What are the costs of heritage learning sessions to schools, learners and heritage organisations?
– Do health and safety issues impact on take up?

1.4.3 Outputs, outcomes and sustainability

Outputs

– What is the number and range of heritage learning outputs (eg number of educational visits, loan boxes, learning packs, learning activity programmes at heritage sites/collections) achieved by each sample project?

Outcomes

– What outcomes have been achieved for learners, teachers and educational and heritage organisations? (eg increased motivation/achievement for learners, raised skills for teachers, partnerships between heritage and educational organisations, better understanding of heritage.)
– Have the heritage learning projects made a tangible difference to participants' learning and teaching?
– What range of good/interesting heritage learning practices can be identified in the sample projects?
– What lessons can policy makers and other providers learn from these examples?
– How can these best be disseminated to other providers?

Sustainability

– Has the heritage learning project work funded by HLF been sustained? (eg if new posts were created, have these been continued at the end of the project?)
– If the project is ongoing, what plans have been made to sustain the heritage learning project after HLF funding ceases?

1.5 Methodologies

In order to answer these questions, the evaluation employed a mixed methodological approach which drew on both quantitative and qualitative methods. These include:

1.5.1 Sensitising interviews

A number of preliminary interviews were undertaken to sensitise the researchers to the issues associated with this evaluation. These included members of the curriculum councils in England, Wales, Scotland and Northern Ireland. (Contact was made with four organisations during March 2004.)

1.5.2 Review of the literature

A systematic search of electronic databases (British Education Index, Education Resources Information Centre(ERIC) and Social Science Citation Index) and hand searching of current periodicals were undertaken during February/March 2004. (See Appendix A1 for details of search strategy.)

1.5.3 Website

In order to publicise the evaluation and also to encourage a wider range of informants to contribute their views, the SCRE Centre established a website <http://www.scre.ac.uk/heritage> which provided the following:

- Details of the project, including background, main research questions, approximate project milestone dates and a project leaflet.
- A simple form, giving an opportunity for interested parties (eg heritage professionals, teachers, local authority representatives, other adults, pupils/young people) to submit comments electronically to the research team. (None was received.)
- A downloadable copy of the SCRE literature review, following approval by HLF.

HLF agreed to publicise the web address, especially in print through its networks.

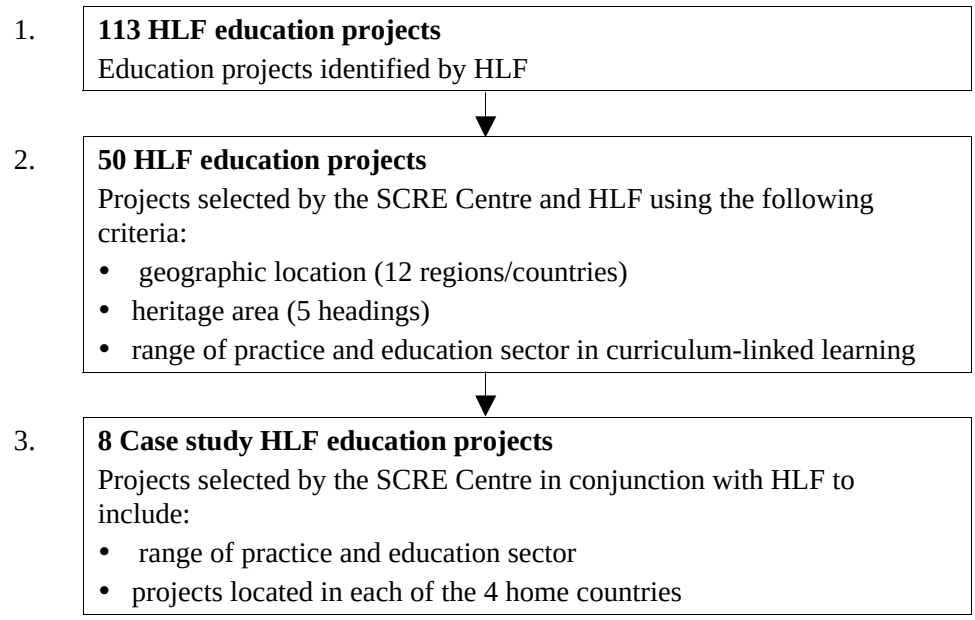
1.5.4 Data collection: Questionnaires to a sample of 50 projects

Evidence was collected from two sources: questionnaires, and a more detailed examination of eight case studies. Fifty (50) HLF-funded education projects were selected from the 113 education projects identified by the HLF. Further details of the composition of the sample are presented in Appendix A2, and an overview of the structure of the evaluation is given in Figure 1 below. Projects were selected using a two-stage process. First, a stratified random sample of 50 projects was generated based on the 9 English Regions and 3 countries of the UK These are: Scotland, Northern Ireland, Wales, London, East Midlands, West Midlands, East of England, South East, South West, Yorkshire and the Humber, North West and North East. Four projects were selected in each region/country, with the exception of London from which six were identified. The random sample was then adjusted to ensure that it covered a range of educational sectors, completed and approved projects, and the heritage areas used by the HLF:

1. Historic buildings, monuments and archaeological sites
2. Industrial, maritime and transport collections and sites
3. Intangible heritage, such as cultural traditions, oral history, language
4. Land and biodiversity including parks, designed landscapes, countryside, habitats, and priority species in the UK Biodiversity Action Plan
5. Museums, galleries, historic library collections and archives.

A draft questionnaire was developed (see Appendix A4 for an annotated questionnaire) after discussion with two HLF project organisers and one project user (the Imperial War Museum's Holocaust Centre, the Northern Ireland Rural Repository and Kingsbury High School, respectively) to ensure that project organisers could answer the questions posed. This was refined further following discussion with the HLF.

Figure 1: Sample of HLF funded education projects



1.5.5 Data collection: Case studies

As a second stage of data collection, eight HLF-funded projects were selected for more detailed study. These were identified following analysis of the completed questionnaires. Each case study was visited by a researcher who undertook the following activities:

- Took digital photographs of teaching and learning activities associated with the HLF project.
- Used the photographs as visual prompts for interviews with individuals and groups of children/young people
- Held focus group discussions with pupils/young people who had participated in the project activities.
- Conducted individual interviews with heritage staff and a sample of teachers/lecturers who use the facility.
- Reviewed examples of preparatory and/or follow-up materials developed from the project.

1.6 Organisation of the review

The findings from the study have largely been organised by research question. The report is presented in six chapters, of which this introduction is the first. In Chapter 2 the main issues to emerge from the published literature are presented. Chapter 3 describes the delivery methods employed by the sample projects. Chapter 4 identifies the resources used and issues related to costs and sustainability. Identifiable outputs and outcomes from the projects are explored in Chapter 5. Finally, the last chapter concludes with the factors which are associated with successful HLF funded education projects.

2: Issues arising from the literature

2.1 Introduction

In this chapter the main points to emerge from a review of published literature on heritage education are presented. The overall aim of the review was to explore the literature published during the past ten years in the UK and abroad on links between heritage and formal learning within the primary, secondary and post-16 sectors in England, Wales, Scotland and Northern Ireland.

A full report of the findings was submitted to the HLF in March 2004 and can be found on the SCRE Centre website <http://www.scre.ac.uk/heritage/> and the search strategy is described in Appendix A1. In this chapter we look in particular at those studies which comment on the connection between heritage and the curriculum in schools and colleges, beginning with the areas of the curriculum traditionally associated with heritage education, before identifying a possible impact on learning and teaching. We have incorporated studies covering the broader definition of heritage used by HLF which encompasses aspects of culture, language, ethnicity, religion, nature, land use and the historic built environment. Research evidence about the extent to which these diverse heritage-related topics are currently being embedded in the school and college curriculum is described. The reviewers make no claims of comprehensiveness or generalisability as the review was conducted during a very short period and the number of references included has been limited to those that were readily available to us.

2.2 Curriculum areas in which heritage education is linked

What can we deduce from published studies about the places in the curriculum in which heritage education has been linked? In one area of heritage, the Museums and Galleries Commission provided a fact sheet to help schools make the links between museum collections and the national curriculum by providing opportunities for education away from the classroom and handling of historic objects. It expected museums to:

> … assess their collection to establish links with current topics and work with teachers to tailor their programmes (Wilkinson, 2000b: 4).

A number of researchers suggest that the broad area of arts in the curriculum, including music, dance, drama and the visual arts, enable children to engage with heritage by for example, drawing pictures of objects, creating poems of sculptures or making puppets and masks of species and habitats. (See for example, Bianchi, 1999; Dear, 2001; Downing *et al*, 2003; Dyer, 1990; Haanstra *et al*, 2002; Marshall, 2004; Nagel *et al*, 1997; Sharp *et al*, 1998; Xanthoudaki *et al*, 1998.) Specifically, Roker and Richardson (2003) mention that music and fashion are key ways of connecting heritage to young people. Heritage connections are also reported in art and design and architecture, multiculturalism and religious education (English Heritage, 2002; File, 1995; Flogaitis & Agelidou, 2003; Garside, 1995; Gregory *et al*, 1999; Homan, 1993; Macdonald, 1991). Studies of English language, literacy, literature and

citizenship include some discussions connected to cultural and national heritage. Likewise it would seem to be fundamental to the teaching of national or minority languages, such as Welsh, Scots Gaelic, Irish Gaelic and the Scots language. There is also published research linking heritage to history and geography (Biddulph & Adey, 2003; Bull, 1993; English Heritage, 2000; Harland, 1990; Jackson, 2000; Lee, 2003; Stanley, 2002; Thistlewood, 1986). However, little research was found on heritage-linked education in the post-16 sector, with the exception of the incorporation of heritage in archaeology and in tourism studies (Waitt, 2000).

Despite the emphasis on numeracy and mathematics in the National Curriculum (Department for Culture Media and Sport, 2000), we found no published research about the use of heritage resources to enhance aspects of the mathematics curriculum, although the Scottish Museums Council (2003) suggests that 5–14 Curriculum opportunities in mathematics may involve archaeological digs and architecture of historic buildings. Smithers (2004) also points out that the new 14–19 Reform of the National Curriculum proposed for schools and colleges in England emphasises the need for further development of young people's language, communication and number skills. This may offer opportunities to embed heritage into these curricular areas.

One survey (Mori, 2001) suggests that heritage activities can contribute to enhancing children's Information and Communication Technology (ICT) skills, and 62% of the surveyed children thought that one of the best places to learn outside school is on the Internet.

In the sciences, the role of heritage education in museums, particularly in the natural and environmental sciences, is highlighted by Lucas *et al* (1997), McManus (1987), Tunnicliffe (2000), and Tunnicliffe *et al* (1997). The National Advisory Committee on Creative and Cultural Education (NACCCE) (2000) pointed out that the provision of various learning contexts and opportunities for creativity in science can be particularly important in meeting the needs of pupils with Additional Support Needs (Solomon, 2001).

More generally, there is limited research to link the enhancement of pupils' self-esteem by encouraging their personal knowledge and understanding of local heritage, with any improvement of individual school performance (Morris Hargreaves McIntyre, 2002). Most published references to heritage link it to specific curriculum subjects, rather than to cross-curricular initiatives; proposals to create a new history/archaeology GCSE in England fit into this category.

2.3 Impact on pupils'/young people's learning

Overall, there are very few examples of well-designed research projects, which identify the impact of heritage education on the formal learning of pupils/young people. Hein (1995), supported by Xanthoudaki (1998), advocates a model of a constructivist museum which allows visitors to draw their own conclusions about the meaning of the exhibition: there may be multiple paths through exhibits and a range of ways of acquiring information. They argue that the focus

should, therefore, be on the needs of the learner, and exhibits should be presented in such a way as to encourage learners to create knowledge using personal learning methods. Evidence to show that this method is effective is much more difficult to find. Parker *et al* (2002), argue that there is a need to research effective evaluation methodologies which go beyond 'fuzzy logic' to determine critical success factors. Sharp and Le Metais (2000), in a review of the place of arts, creativity and culture in 19 national education systems, suggest that various countries are exploring the extent to which they need to help pupils recognise the value of arts by:

- Making the learning experience enjoyable and relevant
- Providing sufficient time for arts experience
- Identifying the barriers to developing creativity in schools; and
- Enabling pupils to benefit from high quality partnerships.

Russell (1994) found that children seem to prefer interactive exhibits in museums which offer them opportunities for whole body involvement, and/or which focus on people and their attributes. However, they also point out that 'hands on' should not be perceived as an end in itself, but as an aid to the development of individual interpretative frameworks, through which the learner makes sense of the experiences that museums provide.

Carter (2004), in an investigation of five million words used in everyday spoken English, provides evidence of the impact of talking, story telling and culture. The research found that children's creative language development often 'signposts' the nature of interpersonal relationships, plays an important role in the construction of identities, and is more likely to emerge in social contexts marked by non-institutional, symmetric and informal talk. This has implications for how school visits to museums are organised and and whether it is better for children to discuss exhibits with their teachers or other accompanying adults – a point explored by Tunnicliffe (2000) which is discussed in a later section.

Morris Hargreaves McIntyre (2002) questioned 75 children aged between 3 and 16 in Manchester and Shropshire about their attitudes towards culture. A variety of methods, including focus groups and 'draw and tell' activities, confirmed MORI's (2001) findings that computer games, Internet access and being able to touch museum objects/working models are the most common suggestions which young people have for making museum visits more enjoyable – and hence more likely to promote their learning. Visits to museums were often prompted by topics the child was studying at school. Despite the frequency with which children refer to ICT as a way of accessing culture, it is clear from research on the role of museums, archives and libraries in neighbourhoods (Parker *et al*, 2002) that ICT can be a double-edged sword: it may very well encourage access by some children, but lack of ICT skills can reinforce the social exclusion of others.

More recently three published studies shed some light on the factors, which may contribute to successful heritage learning (Downing *et al*, 2004; Hooper-

Greenhill *et al*, 2004; and Morris Hargreaves McIntyre, 2004). Enjoyment, participation, partnership, strong themes and skilled staff are some of the key themes to emerge. (The findings are discussed in greater detail in Section 6.2.) In addition, the Museums Libraries and Archives Council initiative *Inspiring Learning for All* (MLA, 2004) provides a framework for outcomes based education from heritage which researchers suggest should be embedded in heritage education (Morris Hargreaves McIntyre, 2004).

2.4 Impact on pupils'/young people's attitudes

There is some evidence that visits to museums, galleries and libraries can impact on the attitudes of pupils/young people. A survey by MORI (2001) of museum and gallery visitors found that the impact varies according to the regional and socio-economic differences of the young people. People in social classes ABC1 accounted for 70% of museum visitors, and people living in the South West of England, Wales and Northern Ireland appear less likely to visit museums and galleries. More than a quarter of school children had visited a museum or gallery website, and one third had returned to a museum or gallery which they first visited with school. Although 7 out of 10 children believe that a library is one of the best places to learn outside school, followed by the Internet (62%) and TV and video (50%), only 3 out of 10 children considered local and national museums/galleries as good places to learn.

Despite these results, Roseaman (1997) believes that members of the public have a clear idea about heritage. They think it:

- is about the past
- makes us what we are today
- is about the future
- gives us identity.

One young male informant in Glasgow explained that heritage 'is an indirect way of educating us when we're young about our history' (Roseaman, 1997: 9). And MORI's (2001) research also suggests that school children still have a relatively positive attitude towards museums and galleries.

There is also, however, some evidence of a dissonance between heritage, as traditionally defined, and the perceptions of some members of minority ethnic groups. Hooper-Greenhill (1998) points out that for members of minority ethnic groups, heritage may be seen as 'posh and intellectual', and 'a white perspective' associated with 'colonialism'. Members of Black, Asian and Chinese communities who participated in focus group research in London, the Midlands and the North of England, demonstrated that visits to museums and galleries could sometimes reinforce negative attitudes. The atmosphere of museums was described as 'quiet, reverential and un-welcoming to children … a place for posh people and intellectuals'(Hooper-Greenhill, 1998). Art galleries were perceived to be even more distant and elitist. The common perception amongst visitors from minority ethnic groups was that material and objects on

display had been 'looted from their countries of origin during the colonial period'. Although these views were expressed by 25–50 year old adults, half of them had children who could be influenced by their parents' attitudes to heritage.

Part of the problem may be due to the concept of heritage being used. For example, Roker and Richardson (2003) point out that young people, and in particular young men from disadvantaged backgrounds, are less likely to engage with conventional types of heritage. They suggest that many young people have a very individual and personalised view of heritage, and many are interested in fashion and music: successful projects will, therefore, take account of these differences.

Although there are examples of heritage being used to support citizenship education (eg. English Heritage, *Citizenship. Using the Evidence of the Historic Environment. A Teacher's Guide* (2004); National Maritime Museum pack on *Planey Earth ... or Planet Ocean*? (2003), these are relatively new initiatives and no published evaluations were identified. Available published evidence is small scale emerging from a study of groups of pupils in Years 7–10 in three urban secondary schools in the south of England (Chamberlin, 2003). This claimed that pupils lacked interest in the subject and had little knowledge or enthusiasm for the three elements of the citizenship curriculum: social and moral responsibility, community involvement, and political literacy. In contrast more positive attitudes towards citizenship education in secondary schools were reported by OFSTED (2005). Although inspectors also found that pupils' achievement and the quality of teaching in citizenship compares unfavourably with established subjects, pupils' attitudes to citizenship were reported to be 'good'.

In addition, there is a danger that negative attitudes of pupils and young people may be exacerbated by the attitudes of students training to be teachers, many of whom have little experience of museums, libraries, archives and the natural environment, and some of whom report having had 'bad school experiences' and having found museum visits 'boring' (Streatfield *et al*, 2003).

2.5 Heritage professionals

Young people's first formal experience of heritage traditionally defined may be through contact with education officers, curators, librarians, rangers or other professionals who are associated with particular sites. This can be influenced by the attitudes of heritage professionals they meet: Russell (1994) pointed out that the curator's gallery may be seen as the 'top of one pole' and the visitors' gallery the 'bottom of the other', reflecting what was perceived to be the differential expertise required to relate to other professionals as opposed to members of the public. It is, however, clear from the literature that practices in some areas have moved on. For example, Jones (2002) writing about ways of encouraging community involvement in the management of urban parks – part of our natural heritage – suggests that what is needed is the involvement of

people with genuine interest in young people's views, who can 'get kids onside'. And Khan (2000: 4) recommends that 'a well-informed understanding of cultural diversity is a fundamental requirement for [museum work]'.

Tunnicliffe (1997), in an article about the missed educational opportunity of school visits to museums, points out that more recent research has begun to consider the cognitive content of the 'dialogue between visitor and exhibit designer'. She believes that such studies have tended to focus on the leisure visitor, and more research is required which focuses on organised school visits – a topic which she has explored in relation to the Natural History Museum.

2.5.1 Teachers and lecturers

There are, as one would expect, more references to the role of teachers in heritage education than for any other single group of adults. Downing *et al* (2003) report a survey of arts in primary schools in England in which they found that increase in provision for the arts is due to staff-related factors, such as the enthusiasm and skills of individual teachers. This conclusion is supported by Harland *et al* (2000) in a study of effective arts education in secondary schools in England and Wales. They conclude that individual teachers are probably more important determinants of effective arts provision than whole-school factors, because teachers demonstrated 'passion and commitment' to the art form: this heavily influenced pupils' subject choice at Key Stage 4. Effective teaching included a high challenge/high support and praise culture, similar to the traditional apprenticeship model of learning.

There is, however, some evidence that teachers appreciate visits to museums and galleries and seek opportunities to incorporate these into their practice. Hooper-Greenhill *et al* (2003) report that after a visit to the Prescott Museum, teachers reported that their students' literacy, design, speaking and listening skills were all enhanced in practical ways. Lisle (2004) offers music teachers some ideas for integrating school visits into curricular and cross-curricular learning: these include Elgar's birthplace, where workshops can be geared to specific requirements, and the Holst Birthplace Museum, in which washing and cooking sessions in a Victorian kitchen tie in with music and science. Lee (2003) argues for models of teaching history based upon students undertaking empirical research. This clearly involves a role for site visits, and use of data archives and artefacts to help students develop their attitudes and historical understanding.

However, there are still difficulties which need to be overcome if teachers are to make full use of heritage opportunities. Xanthoudaki (1998) argues that part of the problem teachers experience is conceptual: is the gallery a classroom resource or a teacher about its own collection. In addition, Xanthoudaki suggests that the prime factor discouraging teachers' use of galleries is that galleries may not take account of the school curriculum and teachers' requirements. She believes that through the use of interactive techniques and questioning guided by course materials, teachers begin to develop different kinds of appreciation of gallery visits and the learning processes which take

place in front of original art works. Such techniques could, of course, be equally important for promoting effective learning through related websites after a school visit.

2.5.2 Other adults

Other adults have a contribution to make in helping young people incorporate heritage into their formal learning. Some researchers (Bianchi, 1999; Harland *et al*, 2000; Downing *et al*, 2003) found that other adults can influence young people's attitudes towards heritage. For example, Harland *et al* (2000) recommend 'cultural mentors' and Youth Service connections because they add flexibility and informality to the learning process. The appropriateness of the adult role model in heritage education is also raised by others. For example, Cottle (2004) points to the BBC's use of personalities, such as David Attenborough, to enhance the appeal of natural history programmes. Cottle also reports attempts by the BBC's Natural History Unit to seek out new presenters, some of whom have already become minor celebrities on the basis of their presentations, and all of whom are young and attractive to young people. The appropriateness of other adults is also raised by Roker and Richardson (2003), who suggest that using others who have credibility, including youth workers and peer educators, to introduce young people to heritage activities is one way of engaging with young people. Bianchi (1999) provides a detailed example of the work of one gallery – the Arnolfini contemporary art gallery in Bristol. Initiatives launched by the gallery include events targeted at previously under-represented groups, such as disabled artists and audience development projects, such as Accelerator Show and Hip Hop Group GNVQ, Rhapsodies in Black and a Rastafarian Saturday school. All of these were aimed at widening access by using the expertise of adults from under-represented groups. She does, however, warn that 'cultural traits should not be seen as fixed in tablets of tradition perpetuating a stereotype of African art as only drums and masks'.

2.5.3 Parents

Parents can and do exert an influence on their children's attitudes, behaviour and learning. Some will undoubtedly accompany their children on family or school visits to museums, galleries and libraries; others will pass on their oral heritage within the family or community. There are, however, few examples in the literature of ways in which parents have been encouraged to support their children's engagement with heritage, even though a number of writers have highlighted a potential role for parents. The NACCCE (2000) point out that the headteacher can play a key role within the school by ensuring that the involvement of parents and networks which support the values of cultural diversity, are included in the school development plan. Harland *et al* (2000), in research into the effectiveness of arts education in secondary schools in England and Wales, also highlighted the importance of encouraging parents to participate. On a less positive note, the research team believe that 'overall the picture [of parental involvement] is less than satisfactory for the majority of schools and pupils' (p.11). However, Morris Hargreaves McIntyre (2002) accept that family patterns are so diverse that heritage providers cannot make

any assumptions about 'who are the significant others in a child's life but that learning is part of the wider social and emotional environment in which children and adults are nurtured in families' (p.59).

2.6 Summary

Heritage education can either be embedded in discrete subject areas within the curriculum or incorporated across the curriculum. Most published references to heritage suggest that it is being embedded into specific subject areas. A number of studies allude to the fact that heritage education may affect pupils'/young people's learning and attitudes. However, there were very few experimental or observational evaluations which showed the nature of the effects of heritage education linked to pupils' learning within the formal school curriculum. There was, however, rather more evidence to show how heritage education affects their attitudes. Specifically:

- A number of researchers suggest that heritage education is most effective when museums, galleries, archives and natural history projects adopt a constructivist approach to presenting heritage. This allows young people to create meaningful learning by linking the visits/exhibits to their own backgrounds and experiences.
- Some argue that heritage education is more effective with younger children and also when linked to interactive approaches and use of ICT.
- There is little evidence to show that researchers have identified any association between heritage education and pupils' attainment across the curriculum.
- Some studies show that pupils/young people enjoy visiting museums, galleries, libraries and other sites. Unfortunately, others suggest that young men and members of minority ethnic groups are reluctant to participate or perceive heritage to be linked to a dominant white culture.
- Negative attitudes towards visiting museums and galleries can be shared by some students undertaking Initial Teacher Education courses and, therefore, may be passed on inadvertently to school pupils, mainly through lack of uptake of heritage site opportunities or through lack of effective preparation or follow-up.

These findings form the context for the current evaluation. In the next chapter, the evidence to emerge from the 50 sample HLF-funded education projects is presented.

3: HLF-funded projects: Delivery methods

3.1 Introduction

The previous chapter highlighted the main findings from a short review of published research on the areas of the curriculum traditionally associated with heritage education and its impact on pupils' learning and attitudes. In this chapter the evidence from two sources is presented: findings from an analysis of the questionnaires completed by 50 HLF-funded project organisers are presented and complemented by more detailed evidence from eight case studies. This shows how the 50 sample projects are organised and delivered so as to impact on curriculum-linked learning.

3.2 Overview

Questionnaires were sent to 50 HLF-funded projects (see Appendices A2 and A3 for further details) and all responded. Two projects provided more than one response from different touring exhibitions. The sample covered the range of HLF heritage themes:

- Historic buildings, monuments and archaeological sites
- Industrial, maritime and transport collections and sites
- Intangible heritage, such as cultural traditions, oral history, language
- Land and biodiversity including parks, designed landscapes, countryside, habitats, and priority species in the UK Biodiversity Action Plan
- Museums, galleries, historic library collections and archives.

The responses varied in the amount of detail provided: 12 of the 50 (24%) supplied additional information and records. A few project organisers reported difficulties completing some questions, which they thought were not relevant to their projects either because they did not offer that particular activity or target that educational sector. Therefore, care must be taken in generalising the results from the sample projects. It is, however, evident that a wide range of ways of introducing children to heritage were adopted: these included touring exhibitions, wildlife reserves, visits to archives and museums, artists in residence and outreach activities in schools.

By 2003, thirteen of the sample of 50 HLF-funded projects (26%) were already complete. As a consequence in a few cases, staff had been made redundant and were not available for interview. Some of the projects were part of larger ongoing programmes of support and development in the formal education sector or were the second stage of a restoration/regeneration project. In fact, many respondents mentioned being in receipt of additional funding from such partners as local authorities, government agencies and a variety of charities. Some projects itemised their funding for the last financial year, whereas others only gave the total amount of their HLF funding for the previous three years.

The heritage educational aims of the 50 projects varied considerably in their nature and the level of detail provided by respondents: some specified curriculum stages,

such as Key Stages 1 and 2; some were aimed at children at risk of exclusion, and others had more open-ended educational targets; for instance, to raise awareness of local natural heritage. A key aim for some gallery and museum projects was to increase physical access to their resources. A few aimed to develop resources, such as loan boxes, teachers' packs, websites and new practical activities. Some emphasised that they intended to work both with the formal and informal education sectors and/or offer continuing development programmes (CPD) for teachers through in-service education and training (INSET) courses.

For simplicity of presentation the results from projects in the four 'home countries' of England, Wales, Northern Ireland and Scotland, have not been disaggregated, largely because the numbers from some would be too small to be significant. Half of all 50 respondents did not wish to be identified and hence for consistency all have been anonymised and case studies are referred to by number.

3.3 Aims of the Projects

The 50 HLF funded projects reported a range of educational aims. This is illustrated in the quotations below. A few of the 50 survey respondents gave broad educational targets:

- *To increase the number and range of schools and children using education facilities by 20%.*
- *Enabling schools to engage in curriculum-based projects at any time of the year.*
- *To make heritage accessible to young people in areas of social disadvantage and mixed ethnic communities. To develop a methodology that engages young people in their secondary education.*
- *To strengthen formal and informal educational provision within the museum including national curriculum resources, improving links with educational organisations, develop events and activities.*
- *To enable school children from disadvantage areas in the EAZ* [Educational Action Zones] *to participate in gallery based workshops and follow-up sessions with artists working in school.*

Other survey respondents indicated educational aims linked to specific curriculum stages:

- *To provide curriculum-related archaeology fieldwork and sorting/ identification workshops for Key Stage 2 pupils in the Greater London area* [*…*and] *to provide a schools pack to support this work.*
- [To produce] *loan boxes – KS1 and 2. Training of staff and volunteers in Thinking skills. Production of Teachers packs – KS1 and 2. Production of Thinking Skills website – KS1 and 2.*
- *To provide KS2 and 3 English, History and Geography learning resource* […] *incorporating the National Literacy Strategy* […] *on a website.*
- *To deliver a series of 1-day* [educational] *workshops to interpret the Victorian country estate to KS2 pupils.*

- *To offer KS 2 and 3 pupils the opportunity to understand vegetables and organic issues in an engaging and interactive way* [*…* and] *to help children understand the importance of biodiversity.*
- [To develop] *Archaeology A-level loan boxes, seminars, and resource booklet for students.*
- *To introduce year 5 and 6 children to traditional building skills and materials.*
- *To promote the widest possible access to classical culture to older (post KS 2) students.*
- *To create new audiences for the built heritage specifically at KS2.*
- *To assist with the development of an EO policy* [...] *foster links with Education Services and Social Work* [...] *develop and implement a range of educational activities linked to the 5–14 curriculum.*
- *To* [enable] *students studying Advanced Higher Expressive A&D to develop and curate exhibitions.*
- *To provide a resource to support study of Key Stage 2 and 4 History and Science that would attract visits from a 2-hour drive time* [... and] *create resources to support visits and for classroom study.*
- *To provide guidance, material and training to teachers in primary and secondary schools on aspects of the cultural and natural heritage of the* [nearby] *islands.*
- *To develop a comprehensive framework for heritage education provision in the local area.*

And some of the 50 projects were linked to subject areas without reference to specific educational stages:

- *To enhance the history curriculum and enrich citizenship work* […] *through a series of schools' projects offering hands on experience such as coppicing crafts, dry stonewalling and visits to mining sites.*
- *To continue the provision of existing KS activities, developing further activities and reinforcing taught aspects of the curriculum with practical outdoor drama, science and art. The grant will provide access to new activities* […] *a maze; play area, nature trails with activity stations and sculptures.*
- *To introduce concepts in the national curriculum in natural surroundings. Teaching children about ecology, conservation and bio-diversity but incorporating mathematics, basic science and literacy.*
- *To provide access for teachers through INSET workshops on drama, creative writing and art.*
- *To develop hands on learning resources including costume, handling items, craft and science.*
- *To provide educational programmes for cross-community school groups to promote mutual understanding in terms of religion, culture, the natural environment and archaeological resources.*

The variety of educational aims is exemplified by the eight case study projects. For example, Case study 5, an environmental project attached to a local enterprise company, aims *'to raise awareness of local heritage – mining, maritime and rural crafts'*. Whereas Case study 7, a curriculum development project initiated by a

national curriculum council, states that the overarching aims of the project are that each pilot secondary school *'will engage in a range of curricular and extra-curricular activities that promote knowledge and understanding of the issues of global citizenship'.* We believe that this broad conception of aims by HLF funded project organisers is both a strength and a potential weakness: it demonstrates the ability of projects to respond to perceived local needs for heritage education but also makes it far more difficult, if not impossible, to evaluate the effectiveness of projects.

The next section details the curriculum areas covered by the 50 projects and illustrates these with details from the case studies.

3.4 Curricular areas covered

The 50 sample projects covered all curriculum areas. As can be seen from Figure 3.1 below the most commonly cited subjects were, History, Art and Design, Science, Geography and Environmental Studies (ES). Modern Foreign Languages (MFL) and Physical Education were seldom mentioned. This was confirmed by the eight cases, which utilised local gallery collections, the natural environment and the built heritage to enrich the school curriculum in history, art and design, environmental studies, geography and science. In contrast, two of the eight case studies sought to introduce children to a wider international cultural heritage: Case Study 4 used artists to teach Chinese dance, pottery and textiles; and Case Study 3 linked the Holocaust to GCSE and A level history and citizenship.

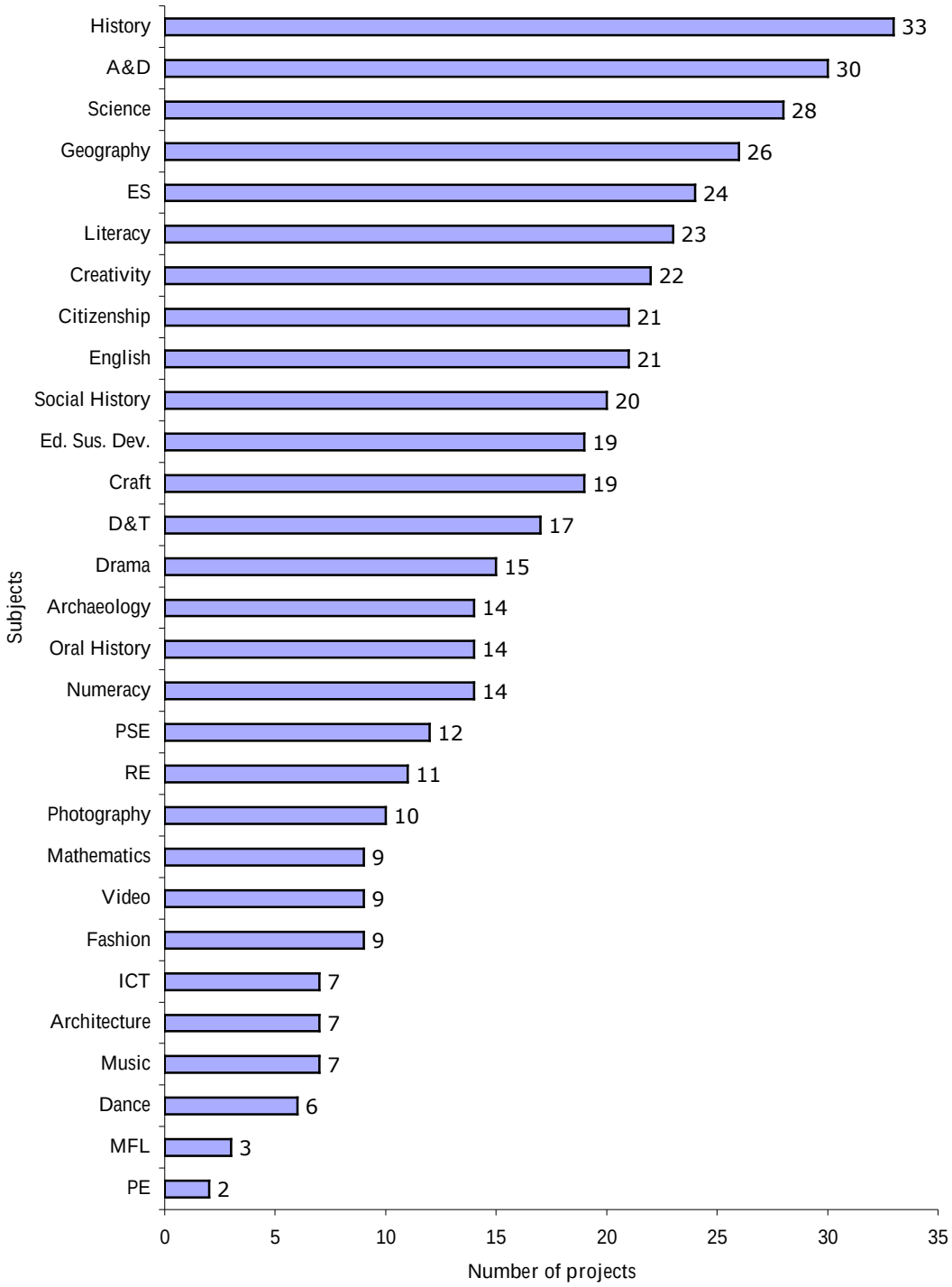
Nine (9) of the 50 survey respondents pointed out that their programmes overlapped or covered other subject areas and/or more general topics, for example:

- Enterprise education
- Continuing Professional Development for Artists/ Heritage Animators
- Media studies/ Humanities
- Latin, Ancient Greek, Classical Civilisation, Art History.

One included:

> *All aspects of the curriculum depending on the needs of the teacher, pupils and the school's own particular curriculum. We* [HLF-funded project] *work to the school's needs and plans. A full morning INSET is compulsory for each visit and each teacher plans the day according to their needs and under the guidance…of* [the project] *teaching staff. We then work with them for the full day.* [There is] *a half day on Drama/Literacy* [covering] *English, Drama, Citizenship, History Poetry, Music, Literacy, Social, Moral and Cultural Education. A full day on literacy covering all of the above. A full day on maths including all of the above plus mathematics, art and craft.*

Figure 3.1: Number of projects covering curriculum-linked learning areas for 5-19 year olds



NB: Many projects indicated more than one curricular area.

The 50 projects encompassed all the curriculum levels including Foundation, Key Stages 1–4, GCSE, A/AS level, Scottish Certificate in Education Standard Grade and Higher Still, and vocational qualifications. However, the sectors of education (nursery/primary, secondary and further education) were not evenly represented. Table 3.1 below shows the total number of projects for each of these education sectors : nursery/primary, secondary (including A/AS level), FE, and also those

which offered continuing professional development (CPD) for teachers and/or artists. Most of the projects (42 of the 50 respondents, 84%) covered nursery/primary schools, and 39 of the 50 (78%) also included the secondary schools. It should be noted that FE was the least well catered for: only 22 of the 50 projects (44%) reported that they worked with the FE sector. A minority of projects included CPD (19 of the 50 respondents, 38%). Most projects (48 of the 50 respondents, 96%) worked across a range of sectors. A few projects were specifically aimed at one sector: 20% (10 of the 50 respondents) focused exclusively on primary schools, whereas only 6% (3 of the 50 responses) were just aimed at secondary schools. Some project activities were tailored to specific groups, such as minority ethnic groups (14 of the 50, 28%), rural communities (15 of the 50, 30%) and students with special needs (16 of the 50, 32%).

Table 3.1: Total number of projects by education sector (N=50)

	Nurs/Prim	Secondary	FE	CPD
No. out of 50 projects (%)	42 (84%)	39 (78%)	22 (44%)	19 (38%)

NB: Many individual projects identified that they worked with more than one age group.

Some clues which explain the preponderance of projects targeted at primary schools are provided by the case studies. Organisers simply found it easier to work with primary schools for a variety of reasons. One organiser of school-based residences (Case Study 4) recognised that support from headteachers was essential if a whole school was to engage in a heritage activity. Others thought that primary school pupils were more enthusiastic (Case Studies 2, 5); that there was more flexibility in the primary school curriculum although this was perceived to be decreasing (Case Studies 4, 8); while the organiser of Case Study 8, a former primary school headteacher, pointed out that she could work through her established network of educational advisors and headteachers. It is interesting to note that she chose to pilot the project in the primary school of which she had formerly been the headteacher, capitalising on her local knowledge and her established credibility with teachers.

The number of projects offering support for each subject in each educational sector (nursery/primary, secondary and FE) is shown in Table 3.2, below. This reveals that local history and history [1]are the two most commonly targeted subjects in both the nursery/primary and secondary sectors; creativity, local history and archaeology were each included in nearly half of the 22 projects supporting FE.

[1] This distinction between local history and history was adopted to reflect the list of curriculum areas developed by HLF in previously commissioned research.

Table 3.2: Number of projects covering each curricular area by educational sector (N=50)

Curriculum area	Nurs/Prim	Secondary	FE	CPD
English	18	10	3	3
Mathematics	9	4	1	2
Science	26	16	3	3
D&T	13	9	1	1
ICT	6	6	1	1
History	32	23	9	11
Geography	23	15	4	3
MFL	2	2	1	1
A&D	27	21	8	10
Music	4	5	1	2
PE	5	2	1	1
Dance	3	4	1	2
Drama	13	8	3	3
Citizenship	20	17	3	5
PSE	10	8	2	1
RE	8	6	2	2
Creativity	21	13	10	8
Literacy	22	12	3	2
Numeracy	14	8	3	1
Architecture	5	3	3	2
Craft	18	9	3	1
ES	22	16	4	4
Ed. Sus. Dev.	16	13	4	5
Fashion	4	3	1	1
Local History	31	23	10	8
Archaeology	16	12	9	5
Oral History	12	7	3	2
Social History	16	12	5	4
Photography	7	8	4	1
Video	2	5	3	1

3.5 Ways of linking to the curriculum

All of the 50 survey respondents indicated that they targeted both specific sectors and specific areas of the curriculum as described in Section 3.3, above. Further details of the ways in which organisers ensured that project activities articulated with educational stages and areas emerged from the case studies. For example in Case Study 2, the project officer liaised with local schools. She usually provided pre-visit material but preferred to have a pre-visit meeting in school with teachers,

and also encouraged them to visit the museum. This, she believed *'gives us all a chance'* to meet the children's needs. For the observed session, the teacher had suggested the topic, *Make do and mend during the Second World War*. She believed that having been both a teacher and museum worker helped her to be *'intuitive with teachers'.*

The same approach of providing bespoke activities was identified by the project organiser in Case Study 4. This project offered schools *Maxi residencies* (bespoke 6–10 week partnerships with schools). These involved a team of 4–12 artists, who worked with teachers and pupils to explore cultural heritage, and art forms, and develop skills, culminating in a performance or exhibition (eg dance around the world, creative dance, music, dance and visual arts, *Muslim Diaspora*). The project also provided *Mini residencies* (1–2 day workshops with 2–3 artists in schools), which explored one art form in depth with one class (eg the African American slave experience in drama and visual arts), or taster workshops for a number of classes, (eg Indian dance). The project organiser engaged in discussions with teachers to ensure that the activities fitted into the curriculum. As she explained:

> *In this school the maxi residency is part of a whole school development. It includes continuously talking to teacher and asking 'have you thought about developing this cross culturally?'*
>
> Project Organiser, Case Study 4

Case Study 8 limited its aims to one specific stage of the National Curriculum. The project had developed a pack, *Homes through the ages,* which linked to Local Studies in Key Stage 2. This encouraged pupils to develop observing, researching, ordering and explaining skills as they developed trails around their own towns and villages. Despite the narrow focus, the project organiser explained that the project had spin off links into environmental studies, geography, history, maths, science, design and technology, art and design, local history, drama, citizenship, English and education for sustainable development. This was confirmed by teachers from two participating schools, who demonstrated how the project's resource materials could be developed further depending on the expertise and interest of teachers. Both teachers took the project forward in different ways: one concentrated on the Victorian period, looking at buildings, vocabulary, patterns, colour, texture, and compared these to modern homes; the other focused on the closure of the local linen mill as the impetus for an economic and geographical study of the local town, its houses and shops, and evidence of its beginnings.

Case Study 1, a country park, targeted maths at Key Stages 1 and 2 and had developed a maths trail, *Fun with Numbers!* The trail offered half a day of practical activities to reinforce topics covered at school. These included weight, measurement, estimation, shape, angles and compass bearings. In addition, Case Studies 1, 6 and 7 also offered activities to link in with Key Stage 1 and 2 Environmental Studies. This close link with the curriculum is undoubtedly easier to achieve in projects which adopt an outreach approach. By 'outreach' we mean that heritage education staff work in schools with school teachers, ie through planning sessions, bringing in loan boxes, carrying out environmental work in the

grounds, delivering cultural heritage workshops etc and develop relationships with specific classes and their teachers, and, also engage in joint planning and monitoring of project activities with teachers on school premises. (eg Cases 4, 7 and 8). It appears to be much harder to achieve in projects which cater for large numbers of children at one time and/or offer opportunities for 'one-off' visits by groups of school children (eg Case Studies 1, 3 and 6, each of which could take up to 100 children. In each of these cases, the project organisers claimed to tailor the indoor and outdoor activities to meet the needs of specific groups of children; however, in practice, school parties were divided into smaller groups only one of which could be taken by the project organiser. This left the others in the care of park rangers, other assistants or visiting teachers, which may have diluted the intended effect.

Some case study projects targeted cross-curricular skills and attitudes rather than (but sometimes in addition to) specific subject areas (eg Case Studies 3, 5, 7 and 8). Case Study 7, for example, aimed not only to improve science education in the secondary school curriculum but also to change pupils' and teachers' attitudes towards sustainable development. The organiser proudly reported that consumption of energy in the school had decreased since it had adopted the practical approaches advocated by the project. Another project manager (Case Study 5) placed great emphasis on the development of communications skills, ie talking about the project, and the development of confidence and self-esteem especially with children with additional support needs:

> [We] *talk to class teacher before the project; talk in great detail about what we are trying to achieve. Varying from week to week. Try to make the activity fit around whatever disability is there in group.*
>
> Project Organiser, Case Study 5

Two case studies (3 and 6) also offered activities tailored to those with additional support needs. Case Study 6, catered for minority ethnic groups, and pupils with special educational needs (SEN) and those with social, educational and behavioural difficulties (SEBD). On the day of the case study visit the school visiting was part of an Education Action Zone (EAZ): the teacher reported that many of its pupils were underachieving in class. Although Case Study 3 catered mainly for large groups, it has also offered intensive learning opportunities for small groups of disaffected young people and students from special schools. It was participating in a *Young Roots* programme for young people from minority ethnic groups, which included a 5-day visit to the centre.

3.6 Types and organisation of activities

The sample of 50 projects reported that they offered schools and/or colleges various types of heritage activities in which children and/or young people could engage and that these were organised in different ways. The majority of projects offered short sessions (38 of 50 respondents, 76%) and/or offered tailored work with target groups (31 of 50 respondents, 62%). A few (16 of 50 respondents, 32%) worked long-term with one class. Examples from the 18 open comments received illustrate the flexible nature of some of the schemes:

Production of practical resources for use by teachers […] */Classroom resources.*

CPD training for artists and culture bearers including seminars, courses, placements and mentoring.

Online resources and website – themes which support the [schools'] *learning resource.*

Sessions lasting 4 hours in total.

A half term project with 1 or 2 classes, 1 day a week.

Open to how the school and young people best learn.

Long term informal learning sessions.

INSET training sessions plus the production of paper-based and online learning opportunities.

Hands on experience in practical conservation work.

Joint with other arts venues.

One class for 5 hours, every day during term time.

Working with a number of schools over a 3-year period.

The most common methods and resources amongst the 50 projects included hands on access to resources, production of printed learning resources for young people, and investigative activities. Examples of the variety of activities are quoted below.

Visits to Archaeological digs and Stone Circles.

INSET sessions for teachers: several INSET and open evenings for teachers were held in the first 6 months to introduce teachers to museum resources. Many came on visits and still use the museum today.

Curriculum course design for Education for Sustainable Development.

Limited amount of training undertaken using school loan boxes.

Joint visits [organised] *with other museums - to* [sic] *schools?*

Teachers' development: teaching about prejudice, persecution and genocide.

The Field Trip is going out into the gardens to see the growing [organic] *plants.*

Field trips to farms and CPD training for teachers.

Visits to local sites including using video and photojournalism methods.

Schools visit the Centre to use the displays.

Schools visit heritage sites.

Children come to the historic park.

Trips for families in holidays to local museums and sites.

Outside sites around the locality of the school.

Workshops [for] *young people to sort/ identify pottery* […] *into historic periods.*

Four methods were rated as 'successful' or 'very successful' by the organisers of the 50 sample projects who used these activities. These were: *Hands on access to resources/materials* (32 of the 50 respondents, 64%); *Printed learning materials*

for children//young people (30 of the 50, 60%); *Investigative activities* (28 of the 50 respondents, 56%); and *Pre-visit notes for teachers* (28 of the 50; 62%). Not surprisingly there was some variation between the types of the learning activities adopted by the projects in the different educational sectors. Ways in which these activities were offered, either individually or in combination, to schools are exemplified by the eight case studies. For example, Cases 1 and 5 organised trails in the natural environment so that pupils could experience the outdoors and conduct investigations. Cases 2 and 3 developed hand-on activities based upon historical collections of artefacts, photographs and documents. Case 6 offered pupils the opportunity to undertake scientific investigations within an industrial heritage site. The project has established a bank of environmental science resources, including a class set of thermometers and packs of cards with pictures representing different global weather conditions. On the day of the case study visit the Education Officer used a *Thinking Skills* framework, developed with a local teacher, during which pupils made a wet bulb thermometer. In a final plenary session, pupils reflected on what they had learnt from the day and were encouraged to use their newly acquired vocabulary. Three of the cases (Cases 4, 7 and 8) worked exclusively through outreach, by offering schools artists in residence (Case 4), activities for environmental studies (Case 7) and the development of trails by schools using the built heritage in the school's neighbourhood(Case Study 8). The latter case is interesting because it eschewed what the organiser called the usual 'jewels' from the past and focused instead on houses that had been homes for local people in the past. Some were listed and had been renovated, while others had experienced a change of use or were in need of repair. This articulates with the charity's efforts to save the built environment.

Internet working (ie making project resources accessible electronically and/or identifying resources available through the Internet)) was more common in projects which focused on primary pupils (8 respondents, 20% of projects catering for primary schools) and secondary pupils (7 respondents, 18% of projects for secondary schools) than on FE students (1 respondent, 5%) or teacher training (1 respondent, 5%). It may be that the development of Internet resources is perceived as the final stage to disseminate a project, as in Case Study 8, or that developing electronic resources requires specific skills not usually found in project organisers. One in particular (Case Study 3) realised that electronic storage and retrieval is the only way to ensure that personal testimonies are preserved for future generations of visitors to the site, and had already developed a virtual tour of the centre, its pressroom and research resources.

More of the 50 survey respondents referred to using pond dipping (16 of the 50 respondents, 32%) than using the internet. This was evident in case studies, Case Study 1, a country park, had organised pond-dipping activities linked to Key Stage 1/2 Environmental Science.

Dressing up/role play was reported by 11 of the 50 respondents (22%) in the primary school projects than in other sectors. The project organiser in Case Study 2, a small civic museum, indicated that she adopted a Victorian costume for some outreach sessions in primary schools, and Year 4 and 5 pupils in Case Study 4 wore elements of Chinese dress, ie fans and scarves, as they performed traditional Chinese dances.

Project organisers report that loan boxes were used in about the same proportions in primary and secondary school projects (9 of the 50, 18% and 7 of the 50, 14% of respondents respectively) but none was evident during the eight case study visits.

3.7 Continuing Professional Development for teaching staff

In total, half of the 50 survey respondents offered continuing professional development (CPD) activities for teachers. The distribution of CPD across the educational sectors was: nursery/primary (16 of 50 respondents, 32%); secondary (13 of 50 respondents, 26%) and FE (4 of 50 respondents, 8%). It is clear from the case studies that some projects placed great emphasis on developing teachers' knowledge of heritage, and worked with teachers in different ways in order to achieve this. Some offered teachers discrete courses; others provided teachers' packs or web-based material which they expected teachers to use, while others preferred to work more closely with teachers during outreach activities. Examples of CPD courses include Case Study 1 in which the education officer ran a CPD course for teachers linked to the concept of a *Forest School.* This provided training in how to use outdoor educational activities linked to the curriculum. The project organiser in Case Study 3 indicated that workshops had been held for school inspectors, prison officers, teachers and students in training to introduce them to the collection. The events were perceived to be very successful, but some participants would have liked to have more support in integrating sensitive issues raised into the school curriculum. Case Study 8 had developed a teachers' pack, *Homes through the ages*, which was made freely available to primary schools. Five hundred copies had been distributed to schools, 250 during the past six months, and 49 student teachers and 25 beginner teachers had taken part in CPD associated with the pack.

In contrast to formal CPD courses, Case Studies 4, 5 and 8 demonstrate how CPD can be successfully integrated into the development and delivery of projects. School-based INSET was an integral part of the maxi-residencies offered by Case Study 4. Not only did professional artists rely on class teachers for behaviour support with difficult children, but teachers worked alongside artists, thus increasing their knowledge of heritage and ensuring that it was embedded in the curriculum. A teacher in a primary school in a deprived area provided examples of work which she had undertaken with the help of the project organiser of Case Study 5. Although the project mainly utilised the outdoors, school-based follow-up work with the teacher and the organiser involved pupils in drawing, painting, writing, producing trail guides, display work, tree planting, making a play area, and oral history with older local residents. The teacher reported that although she

was a local resident, she had learnt a lot about the local area which she could incorporate in her teaching. A third example of school-based CPD is evident in Case Study 8. Although the main output from the project is a generic pack that includes teachers' notes, aims and objectives, and pupils' worksheets, the project organiser also worked with teachers in individual schools to develop bespoke resources. Typically, she would approach the local authority education advisors, identify schools which wanted to participate in the project, contact headteachers and agree to work with class teachers in pairs of schools (ie state and denominational schools in pairs). Together they would develop a local built heritage trail and walk it with teachers, provide photographic examples, OS maps, maps through the ages, and an appropriate architectural vocabulary. The project organiser would teach an initial lesson, agree a programme of work, undertake a follow-up visit and teach a follow-up lesson. This very intensive development of teachers was possible because the project organiser had the skills, knowledge, confidence, and credibility to work within schools, and this model might not be appropriate in other cases.

Case Study 4, an arts charity, demonstrated a more commercial approach to CPD and saw it as a way to subsidise the project's other activities. Although teachers' packs and legacy materials were available as an integral part of maxi-residences, artists and teachers were charged for formal CPD. All artists associated with the project were required to undertake training in how to deliver workshops for children. The training was accredited by the Open College Network, and included a 4-day workshop plus 6–10 weeks of supervised placement in schools. This was an intensive commitment on the part of both the charity and the artists, but the project organiser believed that training contributed to the quality of the project. She also pointed out that most of the project's organisers had qualifications in arts management, and that she was also a qualified teacher. In addition, she liaised closely with local authority advisors in five boroughs and offered teachers formal INSET courses in specific art forms and cultures at Key Stages 1 to 3. These included storytelling for early years' pupils and multiple oral traditions. Between January and July 2004, over 900 pupils aged between 5–19 had participated in the project; and associated with this was continuing development for approximately 40 teachers and artists, and formal courses for 20 teachers.

3.8 Educational spaces and access

3.8.1 Educational spaces

The 50 projects provided a range of facilities and opportunities for participants in terms of their design, location and capacity. Some activities were located in what could best be described as classrooms (7 of 50 respondents, 14%); 8 of 50 projects (16%) utilised a combination of educational spaces, including a few which also had their own seminar/ lecture rooms. The majority of the 50 projects had space suitable for informal learning (37 of 50 respondents, 74%) or practical work (33 of 50 respondents, 66%). Access for those with special needs was reported to be poor in some cases (8 of 50 respondents, 16%). Some indicated that some of the learning approaches which the survey asked about were not relevant to their

programmes; for example, theoretical learning styles were reported as not relevant by 20 of 50 respondents (40%) and self-directed learning by 15 of 50 respondents (30%).

The variety of educational spaces used by projects is confirmed by evidence from the case studies. Some (eg Case Studies 1, 2, 3 and 6) had buildings or sites within which the projects were located. Others (eg 4, 5 7, and 8) were entirely school-based. Of those which had buildings or sites, some organisers were content with the space available to them but others suggested improvements which they believed would increase the quality of the projects. For example, the project organiser in Case Study 1, thought that the outdoor education programme could be more flexibly delivered with the addition of an onsite indoor classroom; whereas the organiser in Case Study 2, appreciated the addition of an education room above the museum, but thought it too small to take a whole class comfortably. Case Study 3 had outgrown its original premises and now included a large lecture theatre, well-equipped audio-visual presentations, two exhibition spaces, a landscaped garden and sculptures, a memorial stone and artefacts, and a library for individual research for up to 20 students. Case Study 6 was problematic because its buildings were listed and it was, therefore, difficult to bring access arrangements up to modern requirements. The organiser was aware of the health and safety implications and took time to point out potential hazards to each school party. The organiser of Case Study 5 used a national park as an educational resource. She was fully aware of the health and safety implications. The remaining cases (4, 7 and 8) avoided these difficulties by working mainly within the education spaces provided by schools.

3.8.2 Access

Modes of transport to and from projects varied across the 50 projects: organised coach/minibus was the most common form (34 of 50 respondents, 68%); public transport was specified by 19 of 50 respondents (38%). Multiple modes of transport were often employed. Thirteen (13) of 50 respondents (26%) indicated that their participants made their own individual travel arrangements. The 13 open responses shed further light on issues related to transport. These included:

> *There will be a variety of means employed by different schools visiting different* […] *sites.*
>
> [Some participants] *walk.*
>
> *We do not operate a site but where we organise activity, we have operated a system to maximise the use of coaches by organising them and their route to fill the carrying capacity and we promote the use of public transport.*
>
> *Instant connection; CD and Internet*
>
> *We lay on coaches for trips out of the area.*
>
> [We] *have a minibus for use plus sometimes use of hired vehicles for larger groups.*
>
> *N/A as we have school based projects.*
>
> *The project worker travels to school groups.*

Twenty-four per cent (24%) (12 of 50 respondents) offered transport subsidies to visitors. Some detailed comments highlight the nature of the subsidies involved:

> *Schools from disadvantaged areas can apply for £80 towards the cost of a coach, five schools did so.*
>
> *Other groups are subsidised for whatever means of transport is most appropriate, eg taxis, minibus..*
>
> *We subsidise the cost of travel to museums (part of our artist residency programmes) through our funding from the HLF.*
>
> *We do offer subsidies through the separate Green bus scheme.*
>
> *We don't charge for our minibus use.*
>
> *Education Officer involved in raising funds for transport bursary from outside sources.*
>
> *HLF funding of projects has reduced cost of visit to centre by 50%.*
>
> *Schools can claim travel expenses from the project.*
>
> *When working with disadvantaged groups/schools, travel subsidy is vital* […and] *when working with target hard to reach communities. The budget allocated* […] *has been completely spent.*

Transport did not appear to be a problem for any of the case study projects. Some participants (eg in Case Studies 4, 7 and 8) were already in schools in which the activities were to take place. Occasional visits associated with these projects used public transport or children walked around the locale. Others (eg Case Study 2) targeted local primary school pupils, most of whom could walk to the museum. One project (Case Study 5) worked only with small groups and had a mini-bus in which to transport pupils. In Case Studies 1, 3 and 6 teachers organised coaches to take children to the sites. In all cases classroom assistants and occasionally parents accompanied school groups in order to meet the adult:pupil ratio of 1:3 for pre-school children, and 1:10 for other age groups.

3.9 Partnerships

The open responses to the questionnaire show the range of collaborative partnerships with which the 50 projects were involved. These include a range of Government departments and agencies, local authorities, other museums and galleries, schools, colleges, universities, and other charities and societies. Specifically these include:

- Gracehill Village Association/Mourne Heritage Trust/Caledon Regeneration Group
- Historic Buildings Council/Environment and Heritage Services
- Northern Ireland Court Service/Northumbria Police
- NI Department of Education/S QA/Bristol Community Education/Glasgow City Council
- National Portrait Gallery/The Lillie Art Gallery
- Forestry Commission

- Careers Wales
- Schools/College/EAZ
- Local ethnic community organisations/Local Festival Organisation/Local History Group
- University of Cambridge/Manchester University/Centre for Whistler Studies
- Norfolk Museums and Archaeology Service/ Leicester Museum Service
- Arts Council of England
- Woodland Trust/National Trust/Scottish National Heritage/RSBP
- Centre for Ecology and Hydrology
- Science Learning Centres
- Royal Meteorological Office
- BBC Natural History Unit/Channel 4 Education
- The Aegis Institute
- Community First/Right Track/Welcome to our Future
- Seven Waste Services
- Ashlym Organic Farm/Cream o' Galloway (Rainbow Farm)/Meadow Valley Urban Farm
- FACE (Farming and Countryside Education)
- Media Training (Community based work)
- Slough Writer's Group/Local poets/Freelance Creative practitioners/ Maddermarket Theatre
- Royal Naval College/Maritime Conservation Society
- British Museum/Hackney Museum/Docklands Museum/Reading Museum/ Glasgow Museum/Lackham Museum of Agriculture and Rural Life
- British Baha'i community/Bristol Pakistani Women's organisation
- Creativity and Arts team, DfES/DoE Environment and Heritage Service/ DCMS.

Details of how some of these various collaborative partnerships work are provided by the eight case study organisers. Case Study 1, worked in partnership with 65 schools, mostly from urban areas in nearby local authorities. It also received financial support from the Welsh Assembly, the Forestry Commission, Careers Wales, and cement manufacturers and quarries. No limitations appear to have been placed on the project's operation by its various funders.

In contrast, Case Study 2, was in receipt of a local authority grant, which required the museum to target schools within the civic area. Case Study 3 had co-operated with the BBC to produce a video about refugees. The project organiser also mentioned that schools, especially ones in deprived areas, had raised a considerable amount of money for the centre. Case Study 4 co-operated with five boroughs and was also working in partnership with the British Museum, the

Museum of London and the Imperial War Museum. The co-ordinator also mentioned that she had arranged for pupils to visit the Victoria and Albert Museum to see an exhibition which she thought was particularly relevant to the school's on-going project.

Case Study 5 worked closely with the Forestry Commission, and one of its rangers provided a specialist input on trees during the case study visit. Case Study 6 had developed relationships with Educational Action Zones in order to increase access for children from deprived areas. Case Study 7 was being piloted in five secondary schools. One of these schools reported that the project had stimulated it to form a partnership with a school in Kenya. This partnership provides topical material about sustainability issues in developing countries that can be used in the project. The project organiser thought that networking with Non-governmental Organisations (NGOs) and other pilot schools had broadened the school community's understanding of education for sustainable development, and had also inspired the teachers to get involved in the development and teaching of the module for Secondary 1 pupils.

Case Study 8 worked in partnership with the Department of the Environment Planning and Environmental Heritage Services and numerous housing and regeneration groups. The project organiser had formed a close relationship with advisors in the Education and Library Boards and the Catholic Education Board, which she believed contributed to the success of the project. It also ensured that information about the project was included in the ELBs' teacher training 'Discovery Days', and that it was disseminated through the Northern Ireland Environmental Link Education Forum.

3.10 Summary

All 50 HLF-funded projects returned completed questionnaires. These illustrate the variety of curriculum subjects and levels, educational sectors and delivery methods adopted by each. We think that collectively all curriculum areas were covered. Specifically:

- Most of the 50 projects focused on more than one educational sector: 84% (42 of the 50) focused on primary schools; 78% (39 of the 50) on secondary schools; 44% (22 of the 50) on FE;
- 38% (19 of the 50) offered continuing professional development for teachers in order to build up their skills and knowledge about heritage
- History including local history, art and design, science and geography were the subjects most commonly associated with the HLF-funded projects.
- Short sessions were the most frequently mentioned method of organising heritage educational activities (38 of the 50, 76%). In such cases, especially when large groups of children/young people are split up, we think that strategies, such as staff training, are needed to ensure a consistent experience for all learners.

- The next most frequently reported method of organising activities was work with a specific target group/s, eg. work exclusively with Key Stage 2 or with pupils with special educational needs: reported by 31 of the 50 (62%),
- A few (16, 32%) of the 50 projects worked long-term with one class for 8 – 10 weeks. We believe this enabled better relationships to be developed between heritage professionals and teachers, a point exemplified by case study evidence which will be discussed in Section 5)
- Internet working (by using electronic materials developed by projects and also resources available on the Internet) was more common with primary schools (8 of the 50, 20% of those projects catering for primary pupils) than with secondary schools (7 of the 50, 18% of projects for secondary pupils). Only 1 project of the 50 (5% of projects catering for FE) used the Internet with FE students, and only 1 for teacher training (similarly, 5% of projects catering for teacher training).
- Thirty-one (31) of the 50 projects (69%) provided pre-visit notes for teachers in advance of the heritage activity and 28 of the 50 (62%) rated these as successful or very successful.
- The 50 projects offered a variety of educational spaces in which pupils could learn: 74% (37 of the 50) had space suitable for informal learning, 66% (33 of the 50) for practical work, 14% (7 of the 50) had classrooms, and 22% (11 of the 50) had combined educational spaces. We think this latter may present project organisers with more potential difficulties than those who have spaces dedicated exclusively for educational purposes. However, none reported any difficulties.
- Transport to the 50 projects varied: the most commonly reported mode was coach/minibus organised by either the school or the project (34 of 50, 68%).
- Most of the 50 projects operated with either formal or informal partnerships with a variety of other organisations. These included government departments and agencies, local authorities, museums, universities, schools, and other charities or societies. The implications of this will be discussed in Section 6.
- The 50 projects employed a variety of ways of measuring the success of their activities and resources: *hands-on-access to resources* was rated ‘successful’ or ‘very successful’ by the greatest number of the 50 projects (32 of 50, 70%). Further evidence of the success of this methods was evident in the case studies, which is presented in a later section.

4: Resources and sustainability

4.1 Introduction

The previous chapter presented an overview of the various ways in which the 50 HLF funded projects organised and delivered their curriculum-linked educational programmes. Further details were added from the eight case studies which generally confirmed the emerging picture. This chapter moves on to consider the resources used to fund the educational activities of the sample projects, and looks at ways in which the 50 projects have addressed the difficult issue of sustainability in preparation for the cessation of their HLF time-limited grants.

4.2 Finance

The financial profile of the 50 projects varied with their size and underlying nature: HLF grants ranged from £7,000 to over £1 million. The eight case studies also varied in the size of the grant each had received from HLF: these ranged from £85,000 to employ an education officer to over £400,000 to an arts charity to create teaching modules on specific world cultural traditions and deliver these through artists in residence in schools. Just over half of the 50 respondents (52%) operated with a separate educational budget. Others (for example, because the sponsoring organisation was a small charity) included education as a heading within the organisation's annual budget. It could be argued that presenting separate budgets and audited annual accounts may be inappropriate for some very small projects, and full cost recharging would be over-complex in most cases especially when the size of the educational project and the HLF grant are small; however, without a separation of funds, it is difficult to identify the costs incurred and therefore the value-for-money of the impact achieved. For example, a member of staff may be paid through a museum's budget but give some of his/her time apparently freely to the HLF project, creating benefits without attached costs. There were certainly examples in the eight case studies in which the value of the input of resources was not recharged to the HLF funded project. For example, in Case Study 5, a ranger from the Forestry Commission accompanied a group of children for a morning walk. Similarly, park rangers in Case Study 1 and site attendants in Case Study 6 supported the HLF education projects by undertaking activities with small groups after a larger school party had been divided. In Case Study 7, only the salary of the project organiser was recharged to the HLF grant, whereas teachers' salaries continued to be paid by their local authorities. We understand that the HLF application process requires a contribution from the applicant, however, this mixture of pro bono/in kind access to staff and resources makes financial comparisons difficult.

Information from the eight case studies confirms that projects appear to be successfully attracting partner organisations. For example, Case Study 7 reported that a coalition of national organisations have come together to support the project. This includes: EcoSchools, International Development Education Association Scotland, Royal Incorporation of Architects in Scotland, Royal

Town Planning Institute Scotland, Royal Society for the Protection of Birds Scotland, Scottish Civic Trust, Scottish National Heritage, and World Wildlife Fund (Scotland*).* Although this is an impressive list it is more likely that each is contributing its expertise 'in-kind', which is difficult to quantify, rather than making a financial contribution to the actual income of projects.

Table 4.1, below, shows the enormous range of costs, which vary with the project size. In addition, the mean and median amounts are a useful cost profile.

Table 4.1: The cost profile of HLF-funded projects over the project period (N=50

		Range £	Mean £	Median £
Staffing	(31 responses)	277–87,500	29,000	20,000
Educational materials	(30 responses)	300–27,000	6,000	4,000
Marketing	(23 responses)	135–19,000	3,000	2,000
Staff travel	(24 responses)	46–7,000	2,000	1,000

Twenty-nine (29) of the 50 projects (58%) charge for educational activities, and details about project organisers' attitudes towards charging emerged from the case studies. Forty-two per cent (42%) don't charge which has implications for the continuing sustainability of projects. One, Case Study 2, suggested that it would be impossible to charge schools more as this would affect existing demand which was not always robust. The project received a grant from the local borough charity. Activities were free of charge to schools within the civic area, £1 per child for a two-hour session for schools within 5–6 miles, and £2 per child beyond a 6-mile radius. Another, Case Study 5 did not charge schools but expected a contribution to transport costs. Some participants were subsidised by other public funds. Educational Action Zones paid for pupils to visit the centre in Case Study 6. Some (Cases 4 and 8) had developed arrangements with local authority advisors which resulted in a subsidy for participating schools in deprived areas and/or payment to the project for inputs to continuing professional development courses. One headteacher (Case Study 4) indicated that he 'topped up', out of school funds, the authority's contribution for maxi residences, and was content to do so because he believed the whole school gained from participation.

4.3 Resources

The 50 sample projects had very disparate levels of resources upon which the HLF-funded projects could draw. This is demonstrated in the case studies, some of which were based in already established museums, centres or country parks (eg Cases 1, 2, 3, and 6); others (eg 4, 5, and 8) were education projects proposed by arts or heritage charities or societies; and Case Study 7 originated in a national curriculum council. We believe that this distinction between those projects that are ' heritage site based' and those which engage primarily in 'outreach' (working in schools) is a crucial distinction one for curriculum-linked learning and, as such, will be explored further in Chapter 6. Here we report

respondents' perceptions of the resources they used, some of which were available free of charge for the project's use, eg. the natural and built environment, and others which required a contribution to the development of an educational space, eg. museums and heritage centre.

- The project organiser of Case Study 1 thought that the absence of an indoor educational space within a natural heritage area hindered flexibility of educational activities.
- Case 2 utilised the civic museum and its exhibitions, particularly one on the Second World War.
- Case 3 was based in a heritage centre but the organiser had identified that changes needed to be undertaken to its stairs in order to improve access for all.
- The resources of Case Study 4 were comprised entirely of the cultural knowledge, skills and experiences of project workers, and the various artists who worked in schools.
- Case 5 used the natural environment by organising visits or walks around the locale, looking for leaves, trees, and evidence of former land use such as mines.
- Case 6 was located within an industrial heritage site, in which all the buildings were listed as of historical interest. Therefore, modifications to improve health and safety and access were limited. The organiser reported that there was insufficient indoor education space to cater for the increased demand from schools during the summer months.
- Case 7 used the facilities of the pilot schools: these included classrooms, playing fields, libraries, whiteboards and fully equipped computer suites. All schools were connected via the Internet to the National Grid for Learning and supported by the curriculum council. The programme required four staff to support students in the ICT suite during the 12-week module.
- Case 8 utilised the built heritage and resources published about them but worked in space provided by participating schools.

4.4 Staffing

Project organisers reported that a variety of paid and voluntary staff were employed across the 50 projects: paid staff ranged from 0 to 12 people, and volunteers from 0 to 29 people. This is not surprising when the range of grants is considered: these extended from £7,000 to over £1 million. However, it is not clear whether all the staff were funded entirely on HLF grants or working exclusively on educational projects. (More financial details are given in the annotated questionnaire in Appendix A4.) Education Officer was the most frequently mentioned position (22 of the 50, 44%), followed by project manager/co-coordinators (10 of the 50, 20%). Some of the other specified posts, listed below, may actually perform similar or overlapping functions:

- Research Officer
- Head of Education
- Educational Guide/Tutor/Support Teacher
- Field Officer/Outreach/Community Liaison Officer
- Project Mentor
- Administrative Officer/Assistant/Secretary
- Information Officer/Web Designer/Publishing Manager
- Writer/Artist/Drama Specialist
- Exhibition Manager
- Museum Officer
- Key Worker/Learning Officer/Schools Officer
- Archival Assistant/Transcriber
- Archaeologist
- Training Officer/Education Leader
- Interpretation Officer/Historical Officer.

Staff were employed on a variety of types of contracts including: hourly rate, part-time and full-time, free-lance, and as consultants. The majority of projects (31 of the 50, 62%) employed at least one full-time member of staff. Forty-two per cent (21 of the 50, 42%) gave details of at least one part-time staff member. Salaries also ranged considerably with the highest annual wage paid to the post of Project Co-coordinator/Manager. Some responses did not include salaries and one reported that they were *'too embarrassed to give the wage because it was so low'*. At least 16 of the 50 (32%) of projects employed staff with teaching qualifications. The designated rate of pay for an Education Officer could sometimes be well below that of the starting salary for a newly qualified teacher (ie *c.* £19,000). However the median of the maximum salary per project was about £19,000. There was a feeling amongst case study informants, especially those who were qualified teachers, that they could earn more elsewhere. The Education Officer in Case Study 2 pointed out that she received approximately half what she would have expected by this stage as a teacher. This was confirmed by project organisers in Case Studies 4, 5 and 8, all of whom had been teachers. Case Study 8 also indicated that the project had been delayed because the originally-appointed project officer left to take up a teaching post. As she put it: *'the pull of a permanent pensionable post was too strong when you need a mortgage'*. The organiser in Case Study 4 pointed out that most of the project staff had post-graduate qualifications in arts administration in addition to teaching qualifications. This, she believed, contributed to the quality of the programme.

The majority of the projects (36 of the 50, 72%) had not experienced staff recruitment and retention difficulties. However, a minority (11 of the 50, 22%) identified the following specific problems:

> *Difficulty recruiting someone with the required skills for an Education Officer post. Had to re-advertise for an Education Manager post.*
>
> *In 1 recruitment bid for the Education Co-ordinator position and 4 separate recruitments for the Education Assistant position (in the past fiscal year alone)* […] *Low salaries meant that qualified candidates recruited to both* […] *posts turned down job offers* […] *Education Assistant who took the salary offered was inadequate to the job and was released* […].
>
> *Subsequent raise in salary to the Education Assistant post brought in a successful candidate to the post after 2 extra recruitments.*
>
> *Workload has been such that burn out is a danger and retention of staff is difficult.*
>
> *The scheduled 2.3+0.14 fulltime staff are in fact working the equivalent of 5.6 full time staff.*
>
> *It has been difficult to find volunteers who are experienced and knowledgeable enough to take a leading role in delivering environmental education.*
>
> *Volunteer staff do not want the responsibility of leading a group.*
>
> *The first post holder left within the first year due to moving away from the area.*
>
> *Project co-ordinator had to be re-advertised; the post holder left within 4 months of contract with 2 and half years to run.*
>
> *Problem retaining suitable archival assistant.*
>
> *Post has recently been vacated, leaving a 10-month F/T timescale. To attract more applicants I have changed job to part-time status over 20 months.*
>
> *Difficulty in recruitment of experienced staff.*
>
> *The first education officer was attracted to a permanent teaching post with security and pension.*

There appears to be two schools of thought about the role that teachers play in helping staff deliver HLF-funded projects. Case study evidence shows that some heritage professionals (eg Cases 1, 2, 6 and 8) worked closely with teachers to deliver the project's aims. In contrast the heritage sites (Cases 3, 4 and 7) were places to which teachers took school groups on visits, without necessarily contributing to the deliver of the project. This raises the issue of whether the projects offer a service to schools which can be jointly planned and delivered or merely a resource which teachers may use as they see fit.

4.5 Marketing

4.5.1 Methods of promotion used

Project organisers reported that they used a wide range of approaches to marketing and promoting HLF funded projects. The number and type of marketing techniques used varied with the type and scale of project. Direct mailing to targeted schools was the most popular method of marketing. Some

organisations had sought to 'piggy-back' on the marketing activities of partner organisations, as a cost-effective approach. Only seven (7) of 50 respondents (14%) mentioned a website, and one an e-marketing campaign. It should, however, be noted that some case study informants (eg Cases 1, 2, 3 and 8 stressed the importance of, and success gained from, using their personal contacts with schools and educational advisory staff.) Listed below is the complete range of marketing techniques in use by our sample projects.

Advertising, PR, press releases and articles in local and national radio, local and national TV, educational press, local and national press.

Signage and posters.

Leaflets, flyers, post cards, preview cards, bookmarks.

Direct mail to schools and LEAS, Phoning, Visits, Personal contact, eg with teachers, Evening events.

"Project was developed in partnership with target audience".

Employment of marketing manager.

Teachers INSETs and arts co-ordinator INSETs.

Website (7).

E-marketing campaign.

Presenting papers at conferences.

Word of mouth.

"Being a visible presence in the community"; "face-to-face advocacy".

Networking including:

- *Arts in Education Network meetings*
- *Arts organisations fairs and mail-outs eg Arts Council email list; arts jobs and arts news*
- *Use of publicity materials and channels provided by LEAs and other partners eg museum websites, Council fairs, and Nature Trust events*
- *Use of EAZ publicity channels*
- *Community group databases and centralised community group resources*
- *Use of e-mail systems and school mail systems.*

Case study informants provided further clues as to how HLF-funded projects are marketed. The organiser in Case 6 reported that *'in this region organisations such as the GEM and the Museums and Libraries Association (MLA) and the Cultural Diversity Network in Yorkshire provide opportunities for CPD and sharing good practice'*. And the education officer in Case Study 8 described her personal approach as:

discussions with the Education and Library Board advisors and the Catholic Education Board, personal calls, the delivery of resource packs to schools in each of the ELB areas, participation in teacher training 'Discovery Days' and through the Northern Ireland Environment Link Education Forum.

Education Officer, Case Study 8

It is, however, unclear from project organisers' responses whether the main purpose behind their various marketing activities was to raise awareness of their projects and disseminate good practice, increase the take-up by schools, generate an additional income, or some combination of all of these. We believe that these are not necessarily incompatible, but think that marketing for income generation is not well understood in the sample projects.

4.5.2 Target educational audience

Thirty-two (32) of the 50 projects (64%) reported that they targeted their marketing at primary schools; 54% (27 of the 50) targeted secondary schools; 26% (13 of the 50) targeted teacher training. Some focused their activities at more than one sector. The full range of target groups reportedly targeted by project organisers for their marketing activities is presented below:

- Colleges, including art and A level colleges (10, 20%)
- Higher Education (8, 16%)
- Families (8, 16%)
- Community groups and excluded communities (6, 12%)
- Youth Groups (3, 6%)
- The Asian community (2, 4%)
- Pre-school education (2, 4%)

LEA officers, artists, special schools, Saturday schools, excluded and 'hard-to-reach' communities, and basic skills were each mentioned once (2%).

The six remaining responses related to volunteers, adults, informal and other markets.

4.5.3 Target groups

The 50 project organisers targeted their activities at a variety of groups. These are shown in Table 4.2, below.

Table 4.2: Summary of groups targeted by HLF-funded projects (N=50)

	Yes	No
Males	6	25
Females	5	25
Minority ethnic groups	11	20
Rural communities	14	20
Inner city communities	11	19
People from a particular estate	6	21
Students with special needs	12	19
Specific age groups	20	13

NB: Many of the individual projects targeted more than one group.

Open responses included other groups: deprived areas, asylum seekers, special needs, and Asian families. A common theme was the need to be accessible to all which articulates well with policy priorities to encourage social inclusion (Department of Culture Media and Sport, 2003).

4.5.4 Visitor numbers

Information about visitor numbers was provided in a wide range of ways, including reference to the number of events held, the number of visits received, the number of visits paid (eg by an artist visiting a school), the number of teaching resources distributed, the number of website hits, total visitors of all ages, visitors since opening, visitors by Key Stage, visitors by age, or all of these. This reflects the diverse nature of the projects involved. Apparently comparable submissions report an average of 1998 visits over the previous six months (333 per month): this ranges from a low of 80 visitors to a high of 7,000. However, it is difficult to draw firm conclusions regarding the success of projects from these figures as to some extent the nature of the projects will drive visitor numbers and variations are probably inevitable. The more important question is whether there is unmet demand or overcapacity in some and whether each project is marketing the project to the best of its ability and resources but this would require an agreed baseline before comparisons could be drawn.

4.5.5 Level of usage

As can be seen from Table 4.3, below, usage of the 50 projects appears to be generally in line with capacity. A successful project should expect to be sometimes undersubscribed and sometimes oversubscribed; however, problems arise when it is either heavily undersubscribed (0 of the 50) or heavily oversubscribed (6 of the 50, 12%%). Oversubscribed projects can either seek funding to expand or cut back on activity.

Table 4.3: Level of usage of HLF-funded projects (N=50)

	No. of projects (%)
The project is heavily undersubscribed	0
The project is sometimes undersubscribed	11 (22%)
The project is about right in terms of capacity	17 (34%)
The project is sometimes oversubscribed	13 (26%)
The project is heavily oversubscribed	6 (12%)
Don't know	4 (8%)

4.5.6 Level of repeat visitors

The level of repeat visitors for the 50 projects shown in Table 4.4 seems somewhat variable and we think that the ten of the 50 (20%) projects which answered 'don't know' should make efforts to identify whether visitors return in order to aid their marketing efforts.

Table 4.4: Level of repeat visitors(N=50)

	No. of projects (%)
Up to 10%	6 (12%)
Up to 25%	3 (6%)
Up to 50%	9 (18%)
Up to 75%	7 (14%)
Up to 100%	2 (4%)
Don't know	10 (20%)

4.6 Sustainability and future plans

The crucial question of sustainability was a difficult question for many of the 50 project organisers to answer. We accept that sustainbility may be defined in different ways, from financial viability to continuation of the educational idea, and we also understand that it is not HLF's expectation that projects which receive short term funding will necessarily be sustained. It is evident from the questionnaires that the term was understood in a variety of ways. Thirty (30) of the 37 who answered the question (81%) were optimistic to some extent about the sustainability of their projects. However:

- Some of the responses appeared to us to be unsophisticated in their optimism; for example, some seem to think sustainability meant that the materials remained applicable and the schools remained interested, without any mention of how the project would be funded to go forward.
- Some also did not supply enough detail to be convincing that their optimism was well-founded; and
- Some projects were at an early stage and so were naturally optimistic about renewal and sustainability: as projects neared the end of their funded life, the mood of respondents tended to become more pessimistic and some project organisers expressed concerns about the continued employment of project staff

Some projects were in the process of thinking about funding renewal and so could not be definite about whether the project would be sustainable. Some therefore used the survey as an opportunity to make the case to HLF for renewed funding. Similarly, some projects which had not received renewed funding from HLF expressed their disappointment in their answers to these questions. Most importantly, many appeared to be depending on museums/ LEAs to continue funding the posts involved, and there appeared to be a great deal of doubt and uncertainty over whether this would be forthcoming. This was probably the key area of weakness in terms of sustainability. (In this respect, it is noteworthy that many respondents talked about 'the museum' rather than 'the project', that is, they saw themselves as part a museum more than part of a stand-alone HLF-funded project). This 'blurring' of the edges between the HLF funded projects and the host organisations is also evident in the use of staff across projects and organisations and the receipt of 'in-kind' contributions from

the applicant organisations. It makes it difficult to assess accurately the resources used by projects

For a number of projects, it was the scale of the project which would diminish with the end of HLF funding, rather than the project as a whole. This implies that some project organisers saw the museums/LEAs as the primary funder, with the HLF as an added-value secondary funder. This has implications for the perceived impact of HLF funding.

The eight case studies provide further details about project organisers' perceptions of sustainability. For some case study informants, sustainability meant finding alternative sources of funding to continue the project in more or less the same form as HLF had funded it. The Education Officer in Case Study 2, for example, was *'unsure about the future'* but she hoped the project would continue to be part-funded through the town's Museum Services budget. The organiser in Case Study 4, an arts charity, indicated that:

> *No major source of future funding has been identified* [...] *HLF funding has not opened any new avenues of funding but reinforced old ones and raised the profile of the work* [...] *the project has received a small grant from the Arts Council London to develop a seminar series for artists and we have been approached by other organisations interested in putting together partnership bids for future work.*
>
> Project Manager, Case Study 4

Others appeared to be content if aspects of the educational work of the HLF-funded project remained embedded in either the host organisation or the participating schools. It could be argued that this is a good project outcome, and one which might be acceptable to HLF. For example the organiser in Case Study 1 pointed out that some trails had been permanently established outdoors, and at the end of the project some of the educational resources would be housed in the Rangers' workshop to safeguard them for future use by teachers during school visits. The Park's Ranger Service also planned to continue to provide some of the educational activities developed by the Education Officer. The organiser in Case Study 8 indicated that the resources, ie trails and guides, developed with HLF funding would continue to be made available to schools on the society's website. The schools co-ordinator in Case Study 7 thought that:

> *The teachers in the* [pilot] *schools have changed their teaching practice as part of being involved in the project* [...] *two case studies are to be published about how the course has been taught in different ways in two pilot schools and this will share experiences with other schools in Scotland.*
>
> Schools Co-ordinator, Case Study 7

and the Environmental Education Organiser from the same project pointed out that:

> *There is some evidence that the project had affected the school's energy management policy* [...] *the school utilised some renewable energy sources and also a planned weather-monitoring project. We are planning that this is going to go on once* [HLF funding] *finishes. We have established an energy management team within the school.*
>
> Environmental Education Officer, Case Study 7

Some regretted the short-term nature of time-limited funding and indicated that either they or some of their project staff faced redundancy if alternative sources of funding were not identified. Some (Case Studies 2, 4 and 5) believed that it was impossible to be involved fully in the delivery of HLF-funded projects and also develop new grant proposals at the same time. The project organiser in Case Study 5 pointed out that *'the project ends in March 2005 and future funding has not been secured which means that staff could be made redundant'*. She thought that senior managers in her organisation should be developing new proposals. Sustainability of the post was an important issue for the Education Officer in Case Study 6. She wondered whether:

> *It is the organisations that miss out* [...] *I am young I can move on. For me it is a great opportunity* [...] *but what will be left after 3 years? So many posts are short term* [...] *in the end there will be the resource bank. The local schools in the EAZ come for free while the EAZ is funded* [...] *They have to reapply for funding every 3 years. Other schools buy the day off the shelf. I'd like to think that the local schools like what they get. They know me and I tailor the lessons to their needs.*
>
> Education Officer, Case Study 6

Some other project organisers (eg Cases 2 and 5) admitted to having no definite plans. The organiser of Case Study 2, a small local authority museum, reported that she had *'no definite plans for the sustainability of the project. As the project is sometimes undersubscribed, it is not feasible to charge users as this may decrease demand'*.

A few (eg Case Studies 3 and 8) wanted to widen their target group or develop new projects which built on the HLF-funding. The key strategy being pursued in Case Study 3 is to widen access by including primary schools, work with more disaffected young people, and encourage schools from further afield to visit the centre. Case Study 6, for example, pointed out that *'new partnerships are emerging, eg a drama project involving the Education Officer working with a local school's after-school club'.* The project organiser in Case Study 8 indicated that the society would:

> *Like to develop further the context of KS2 materials, target Key Stage 3 by focusing on skills and planning issues and prepare further materials in preparation for the curriculum changes which will be implemented in 2006.*

And finally, the project organiser in Case Study 5 described how she would like to take the project forward.

> *Staff would like to start new project based upon the 'forest school' idea, which uses forests where children build structures and use the outdoor environment to stimulate learning. The Forestry Commission would be willing to co-operate.*
>
> Project Organiser, Case Study 5

In general the relationship between HLF funding and sustainability of projects seems to be based upon the role the funding plays in initiating and sustaining the education project. Where HLF funding is seen as an extra, ie providing the added extras, used to pilot new work, develop specific areas of work, then the project is more likely to become embedded in the organisation once the project is

finished. In contrast where HLF funding is seen as the essential and funds the core education work there is a bigger problem about sustainability, succession planning and legacy

4.7 Summary

The findings from the survey of 50 HLF-funded projects, plus the open responses to the questionnaire and the eight cases studies, illustrate the variety of projects and the range of approaches taken to finance, resources, staffing and marketing by their organisers. In summary:

- The size of the 50 HLF-funded projects varied greatly: HLF grants ranged from £7,000 to over £1 million and in the eight case studies the variation ranged from £85,000 to over £400,000.
- Smaller projects tended not to maintain separate educational project accounts.
- The major indicator of success cited by project organisers was increase in take-up of one form or another, such as take up by schools, number of pupils visits, sessions delivered. Marketing to increase income seemed to be relatively under-developed.
- Sustainability was rarely mentioned as an indicator of success, but did appear more frequently as an aspect that could be improved.
- There was evidence that projects had established partnerships with a wide variety of agencies and charities but these tended to provide 'in-kind' support.
- Project organisers associated staff with a project's success. They welcomed the contribution of skilled staff but pointed out that in some cases staff lacked skills.
- The majority of projects (36 of the 50; 72%) had not experienced staff recruitment and retention difficulties, but 11 of the 50 (22%) had.
- There were two schools of thought about the role of teachers. While all agreed they should be involved in planning the project, several project organisers thought that teachers needed to be taught how to be more autonomous rather than expecting heritage project staff to do everything for the group. This raises the issue of whether the projects offer a service or merely a resource.
- The 50 project organisers expressed a range of views about sustainability of HLF-funded projects: most were optimistic. However, responses appear to be related to the stage the project has reached and the level of financial understanding of the project organiser. Many respondents assumed that the project would be mainstreamed into the museum or local authority's budget; however, we have no evidence to support this optimism.
- We formed the view that sustainability was related to whether the HLF grant was perceived to be essential to the project or funded extras to existing educational activities. In the later case, the activity seemed much more likely to be sustained within an organisation.

- The 50 project organisers expressed both positive and negative views about new avenues which had resulted from HLF-funded projects. The most positive perceived the HLF-funded projects as pilots for future development of ways or working with new or different client groups, resources, or Key Stages, which could be developed if new funding became available. The negative ones reported that staff had already been made redundant because no new funding had been forthcoming.

5: Outputs and outcomes

5.1 Introduction

As can be seen from the previous chapter, the 50 HLF-funded projects varied in size and the amount of resources they used to achieve their educational objectives. Organisers of the 50 projects were asked to identify the outputs which they thought had resulted from the HLF funding. In addition, evidence about the immediate and longer term outcomes for pupils, teachers and others was collected from organisers of the eight case study projects. This evidence is presented below and demonstrates a mixture of intended and unintended positive outcomes.

5.2 Outputs

Projects organisers were asked to indicate the materials, resources or processes which they considered to be outputs from their HLF funded projects from a list of possible outputs generated in consultation with HLF. Table 5.1 provides an overview of the outputs from the 50 sample projects. As can be seen, the most commonly mentioned outputs from the projects were *Hands-on access to resources* (34 of the 50, 68%); *Printed learning material for children/young people* (32 of 50, 64%); *Pre-visit notes for teachers* (31 of the 50, 62%), and *Outreach services to schools* (30 of the 50, 60%).

Table 5.1: Outputs from the 50 HLF-funded projects (N=50)

Output	Total no	%
Workshops led by artists	26	52
Lectures	15	30
Guided tours	26	52
Access to restricted collections	15	30
Hands on access to resources	34	68
Pre-visit notes for teachers	31	62
Printed learning materials for children/ young people	32	64
Website resources for teachers	17	34
Website resources for children	14	28
Interactive technology on site	13	26
Web cam installations	4	8
Outreach services to schools	30	60
Field trips	19	38
Courses for professionals	25	50
Courses for young people	9	18
Work placements for young people	21	42
Loan boxes	13	26
Worksheets	24	48
Investigative activities	28	56
Role play	15	30
Other	4	8

NB: Respondents could indicate more than one output.

Web cam installations (4 of 50, 8%); *Courses for young p*eople (9 of the 50, 18%); *Interactive technology* (13 of 50, 26%); *Loan boxes* (13 of 50, 26%) and *Role play* (15 of the 50, 30%) were the least commonly mentioned. From the case studies, there is some evidence (Case Study 2, 5 and 6) that some project organisers felt role play was more appropriate for primary school pupils. In addition, some project organisers (Case Studies 2, 4, 8) mentioned that they produced loan boxes, but none was evident during the case study visits. In some cases this was because, as the organiser in Case Study 4 explained, *'loan boxes were left as a legacy'* from the project rather than as an educational activity to be engaged in during the project; whereas in Case Study 8 copies of the society's built heritage publications and OS maps were provided to participating schools for their use during the project. Further details about these outputs and the specific areas of the curriculum that they target emerged from the eight case studies.

Case 1

Outputs from Case Study 1, a country park, included the development of an interpretation centre for use by the Education Officer and local schools: 65 schools, most from urban areas in nearby local authorities, had visited the park during the previous six months. The Education Officer had also developed specific curriculum-linked learning packs including: a *Footprints Trail* linked to science/biology; a *Warriors' Quest* to enhance literacy and numeracy activities; a *Fun with Numbers* trail linked to maths; a *History, Tourism and Leisure Background Notes* for an GNVQ in Leisure and Tourism.

Case 2

The main outputs from Case Study 2, a small museum, were the creation of a resource room on the first floor of the museum for use by the Education Officer and local schools (used by 1,417 students aged 5–19 between February and July 2004), and short practical investigative activities for school children that allowed them to capitalise on the museum's exhibits.

Case 3

Case Study 3, a heritage centre, provided an experience for secondary school pupils. An average of six groups ranging from 20 to 500 students visited the centre each week. Direct outputs from the HLF funding include a variety of publications including student guides and resource books, all of which could be taken away and used later in school. However, the Education Officer stressed that although the centre had produced high quality curriculum enrichment materials, *'the Centre is not just a resource: it is an experience',* an example of the added value which can be gained from some site visits.

Case 4

Case Study 4, an arts charity, organised maxi and mini residences for artists in schools. Using HLF funding, the project had worked in five LEAs and 20 schools during the previous year. From January to July 2004, 900 pupils aged 5 to 19 participated, 20 adults engaged in formal CPD courses and 40 teachers and artists engaged in non-formal education. Outputs from the observed maxi residency included a final dance performance by pupils for their parents, examples of pottery, and large felted mats based upon Chinese willow pattern design. The project had also formed partnerships with the British Museum, Museum of London, and Imperial War Museum. Learning resources were left in schools for teachers to use.

Case 5

Outputs from Case Study 5, a community enterprise company, included trail guides created by pupils and guides on how to create cycle ways and woodland parks from the remains of a former industrial landscape. During the previous six months 300 pupils (40 secondary school pupils and 240 aged 7–10) had been engaged with the project. There was evidence of follow-up work in schools which included drawings, paintings, written work, trail guides, display work, tree planting, making a play area, improving the school playground and oral history with older local residents.

Case 6

Case Study 6, an industrial site, indicated that it had over 1300 formal education visitors during May/June 2004 but did not provide comparable statistics for the previous 6 months. It offers *Living History* activities to primary school pupils which included cooking on an open range, costume, role-play, and handling resources. The site had also established a bank of environmental science resources including a class set of thermometers and packs of cards with pictures representing different global weather conditions. During the observation visit, the Education Officer used a *Thinking Skills* framework developed in conjunction with a local teacher. This involved hands-on activities in groups, one output of which was the creation of a wet bulb thermometer. A final plenary session allowed students to reflect on what they had learnt and reinforced any new vocabulary learnt during the day.

Case 7

Case Study 7, a curriculum council project, was at an early stage of development as it had only recently been awarded a HLF grant. However, it was evident that the six pilot schools were taking different approaches to their Environmental Sustainability Education programme. So far, secondary pupils had produced a community magazine, an exotic garden, and a lunchtime radio station. CPD courses for teachers had also been provided by the partner organisations. One of the science teachers reported that she had found the World Wildlife Fund's course useful and also believed that the initiative was making it possible *'to change for the better'* teachers' and the local community's attitudes towards the environment.

Case 8

The HLF funding for the education project in Case Study 8, a built heritage society, had already ceased by the time of the observation visit in January 2005 and the project officer had been made redundant. She reported that outputs included an outreach service of investigative activities concerning the built environment for use with schools (21 schools to date had participated) and also three out-of-school events had been offered in partnership with other heritage organisations. Five hundred resource packs on *Homes Through the Ages* had been distributed to 700 Key Stage 2 pupils (250 during the previous 6 months) and 49 teachers. Fifty trainee teachers and 25 beginner teachers had taken part in continuing professional development activities. In addition, the project organiser had developed a series of local guides to the built environment in conjunction with individual schools. The society's research officer reported that work was continuing on the development of a website on which resources for pupils and teachers would be made available electronically.

5.3 Perceptions of success

How did the project organisers view these outputs? Were some perceived to be more successful than others? All 50 respondents to the questions on measuring the success of various outputs gave detailed responses: 32% (16 of the 50) attached evaluation reports and other documentation. The eight case study informants provided copies of progress reports that they had submitted to HLF and one, Case Study 4, included copies of an external evaluator's report on the project. These are difficult to compare as they vary in length and detail provided, and HLF might wish to consider the advisability of recommending that grant holders use a standard template for evaluation reports which summarises the evidence, rather than presenting copies of pupil questionnaires (eg as in Case Study 4). Many issues were raised by respondents, one recurring theme being that contacts had been established with various partners, including schools and community groups, but that a lead education officer was necessary to continue the ongoing development work. A majority of respondents rated most of their activities and resources as reasonably or very successful. The perceived success is shown in Table 5.2, below. However, in some cases respondents stated that they were not prepared to reply to *'irrelevant questions'* that were not applicable to their specific project. This may explain the relatively lower number of replies about some activities, such as lectures and hands-on resources. Notwithstanding the above, only four respondents indicated that they used Web cam installations, although all four rated the activity as 'reasonably'/'very successful'.

As can be seen from Table 5.2, the four most frequently mentioned activities were rated 'successful' or 'very successful' by over 90% of the projects using them, viz *Hands on access to resources* (32 of 34, 94%); *Printed materials for children/young people* (30 of 32, 94%); *Pre-visit notes for teachers* (28 of 31, 90%); *Outreach services to schools* (27 out of 30, 90%).

Table 5.2: Respondents' views on the level of success of their own resources/activities (N=50)

Resource/activity	No. indicating activity was partially successful	No. indicating activity was reasonably/ very successful	No. using resource
Workshops led by artists	0	26 (100%)	26
Lectures	1 (7%)	14 (93%)	15
Guided tours	0	26 (100%)	26
Access to restricted collections	2 (13%)	13 (87%)	15
Hands on access to resources	2 (5%)	32 (94%)	34
Pre-visit notes for teachers	3 (10%)	28 (90%)	31
Printed learning materials for children/ young people	2 (6%)	30 (94%)	32
Website resources for teachers	3 (18%)	14 (82%)	17
Website resources for children	4 (29%)	10 (71%)	14
Interactive technology on site	1 (8%)	12 (92%)	13
Web cam installations	0	4 (100%)	4
Outreach services to schools	3 (10%)	27 (90%)	30
Field trips	1 (5%)	18 (95%)	19
Courses for professionals	4 (16%)	21 (84%)	25
Courses for young people	2 (22%)	7 (78%)	9
Work placements for young people	3 (27%)	8 (73%)	21
Loan boxes	2 (12%)	11 (88%)	13
Worksheets	0	24 (100%)	24
Investigative activities	0	28 (100%)	28
Role play	0	15 (100%)	15
Other	0	4 (100%)	4

NB: Many respondents indicated more than one activity

A few respondents explained that their project was just beginning and that it was too soon to evaluate success. Other programmes were perceived to have benefited indirectly from the HLF funding. Some examples of positive indirect impact included courses for professionals, work placements for young people, investigative activities, and role-play. The qualitative responses illustrated respondents' perceptions about the levels of success of resources and activities that resulted from HLF funding. Activities which respondents though were very successful activities included:

Field trips to archaeological digs, and Stone Circles.

Provision of localised teaching guidance and resources based on the teacher evaluations of the first two themes.

Professional development, teaching about prejudice, persecution and genocide.

The field trip into the gardens to see the plants at [X] *Organic Garden.*

Field trips to farms.

Schools visit the centre to use the displays.

School visits to heritage sites.

Children come to historic park.

Archaeological investigations workshops.

Loan boxes, worksheets, investigative activities, and role play often form part of the resources that we naturally bring into a residency in a school depending on the needs of the school and the art forms and cultures being investigated. These materials are in the school for the length of the residency and are often left behind depending on the wishes of the pupils, teachers, artist and schools.

Two INSET events were held with 30 teachers at each one.

As can be seen these demonstrate the variety of project organisers' perceptions about what constitutes success. They also identified some activities which they perceived to be reasonably successful:

CPD training for teachers.

Field trips to local sites.

There was a limited amount of training undertaken using school loan boxes.

Curriculum course design for education for sustainable development.

5.4 Outcomes

Learning outcomes are usually defined as the knowledge, skills, attitudes or values that change as a consequence of participating in an activity. These may only emerge over time and may not have been evident during the case study visits. However, we are able to report that all of the 50 respondents to our questionnaire were enthusiastic about the HLF-funded education projects that they were organising. It was evident that each was committed to their particular heritage area, ie Historic buildings, monuments and archaeological sites; Industrial, maritime and transport; Intangible heritage; Land and biodiversity; and Museums, galleries, historic library collections and archives, and some reported that they were willing to accept lower wages than they thought they would earn in other sectors, particularly if they returned to teaching. The project organisers and eight case study informants found it relatively easy to identify a range of outputs from HLF funding, as described above. However, it is much more difficult to find evidence of wider outcomes, including curriculum-linked outcomes, partly because some activities are of a very short duration (eg an hour and a half in Case Study 2) and also because changes in children's knowledge, skills or attitudes may only be evident some time after a visit or activity and may also result from other influences. For each of the eight case studies we have tried to identify what we think the children, who participated in HLF-funded projects knew or could do as a consequence of their participation in the project, and also to note any changes in their attitudes. These are summarised in Table 5.3, below:

Table 5.3: Summary of educational outcomes from eight case studies

Pupils/teachers	Knowledge, skills and attitudes	Learning outcomes
Pupils' learning outcomes	Knowledge and understanding	• Increased knowledge within specific subject areas, particularly history, geography, art and design, science, environmental studies. • Increased local knowledge of natural and built heritage. • Increased knowledge of international heritage. • Increased understanding of sustainable development and energy conservation. • More developed understanding of place and time.
	Skills	• Improvement in collaborative group working. • Ability to work with a wide range of media, eg paint, paper, textiles, clay, wood, dance, music, nature. • Development of observation, practical and thinking skills. • Improved communications skills.
	Attitudes	• Willingness to participate in a new experience • Increase in self confidence and self esteem. • Feeling of enjoyment and satisfaction from learning. • Greater engagement of pupils, especially those with additional support needs or behavioural problems. • Development of empathy and understanding of others.
Teachers' learning outcomes	Knowledge	• Increased knowledge of range of heritage areas. • Increased knowledge of local heritage resources.
	Skills	• Ability to incorporate range of heritage areas into their lesson planning. • Increase in creativity.
	Attitudes	• Increased confidence to include heritage in teaching, especially in expressive arts. • Increase in value placed on heritage education as a way of enriching the curriculum, especially for pupils with additional support needs.

Case 1

Pupils who visited Case Study 1, a country park, were taught to build a fire and read a compass. Teachers reported that students had increased their knowledge of local geography, land use, and wildlife: this was demonstrated in the quality of information on students' wall displays and posters. Teachers were generally happy with the park's practical educational activities and reported feeling more confident in using the resources provided.

Case 2

In Case Study 2, a civic museum, children demonstrated an increased knowledge of how ordinary people lived in local family homes during the Second World War. The practical activities were considered by all informants to be more successful than the gallery work with worksheets. There appeared to be insufficient gallery exhibitions to occupy the time allocated to the worksheet tasks. Two unintended outcomes were evident: firstly, the parent helpers (one

an unemployed father and the other a school dinner lady) were introduced to the museum service; and secondly, pupils with additional support needs and boys were fully integrated into activities traditionally associated with women, ie darning.

Case 3

There was very strong evidence in Case Study 3, a heritage centre, that the educational activities affected pupils' knowledge and attitudes. Year 10 and Year 12 students thought that the day had been very informative and that they had learnt a lot about the history of the Second World War. Year 12 Students of German, who were undertaking an optional module about German culture in the centre, said that they would be following up the topics. Teachers thought that overall the day was useful, especially for Religious Education, German and History. Class teachers said that they would use the discussion time in the Personal, Social and Health Education class to follow-up on the topics raised at the centre. Teachers were impressed with the impact the centre's programme had on students' behaviour and motivation, in particular, personal testimony, had affected pupils' attitudes. (Some were observed to cry.) Teachers also reported that afterwards the attitudes of some difficult pupils to schoolwork markedly improved. They said that the pupils *'had made the link and seen* [its] *relevance because of hearing the accounts …'.*

Case 4

Year 4 and 5 pupils in a maxi residency organised by Case Study 4, an arts charity, demonstrated new skills during dance, textile, and pottery activities. Teachers reported that pupils' motor skills improved, as did their willingness to co-operate and work in a team. There was evidence in each classroom that teachers had embedded the project in the curriculum and extended topics through literacy, poetry, writing, history, geography, and expressive arts. The project also increased children's communication/ linguistic skills, especially for English as an Additional Language (EAL) pupils (64% of pupils in the school were from minority ethnic groups, 35% EAL, and 27% Free School Meals (FSM).) Teachers participated fully in all the activities and reported that working in conjunction with artists had increased their knowledge and confidence in visual and expressive arts.

Case 5

Outcomes from Case Study 5, a community enterprise, show that very young children from deprived areas can benefit from activities in the natural environment, which they would not normally visit. This increased the children's knowledge of their local area, its natural environment and industrial heritage, and also increased the communication skills and confidence of children with additional support needs. It also helped young children to overcome their fear of the woodland and forest areas. The project also increased teachers' local knowledge, eg one teacher visited a former quarry that she didn't know existed.

Case 6

Pupils in Case Study 6, an industrial site, increased their knowledge of how people lived and worked in the past, eg by seeing how power could be generated from a water wheel. One of the teachers was pleased with the activities, which she thought reinforced skills previously taught in school science lessons. She also thought that the climate cards would provide a useful background to her next environmental science lesson about weather systems. A parent valued the opportunity to see the children '*making complicated things'*, such as the wet-bulb thermometer.

Case 7

The observed group of Secondary 1 pupils in Case Study 7, a curriculum development project, were developing their ICT, art and design, and research skills as they produced a project newsletter. Afterwards the pupils, especially the boys, spontaneously commented that they had also developed their skills in how to work with others in groups. Evidence from around the school also showed that a change had occurred in the school's attitude towards energy management. Contact with a school in Kenya was beginning to impact on the attitudes' of pupils, many of whom teachers reported were previously not interested in energy conservation.

Case 8

There was evidence from the trail books produced by pupils in two primary schools associated with Case Study 8, a built heritage society, that the project had developed pupils' ability to observe, gather, record and present evidence from the built environment in their locality. Children increased their knowledge of the local built environment, particularly how ordinary people had lived and worked in the area, as opposed to '*the "jewels", the houses of nobles and well-to-do people'* usually found in textbooks. The projects also offered pupils opportunities to improve their artwork and literacy. Teachers reported that their own knowledge of the local area had increased, and they felt more confident about incorporating observational walks into their lesson plans.

5.5 Summary

- The 50 project organisers identified a range of outputs from their HLF-funded projects: the most commonly mentioned were *Hands-on access to resources* (34 of the 50, 68%); *Printed learning materials for children/young people* (32 of the 50, 64%; *Pre-visit notes for teachers* (31 of the 50, 62%), and *Outreach services to schools* (30 of the 50, 60%).
- Most of the 50 projects reported that they elicited feedback of some sort from participants.
- Four methods were noted 'successful/very successful' by over 90% of the projects using them. These were: *Hands on access to resources* (32 of the 34, 94%); *Printed learning materials for children/young people* (30 of the 32, 94%); *Pre-visit notes for teachers* (28 of the 31, 90%), and *Outreach services to schools* (27 of the 30, 90%).

- It was more difficult to find evidence of learning outcomes from HLF-funded projects, partly because of the short duration of some of the activities, the range and breadth of project aims and also because educational outcomes are influenced by numerous factors.
- There was, however, evidence from the eight case studies that HLF-funded projects were impacting on pupils' curriculum-linked knowledge, and also their skills and attitudes. Changes in skills and attitudes were more evident than increases in subject knowledge.
- Typically pupils knew more about how people lived and worked in the past as a consequence of participating in a HLF-funded project.
- This knowledge was often very localised (eg Case Studies 1, 2, 5, 6, 8) gained by seeing or handling evidence of how people in the past lived and worked, but some pupils also gained an international perspective on the heritage of other countries (eg Case Studies 3, 4).
- Some curriculum-linked knowledge was issue-based (eg sustainable development in Case 7); whereas other projects enriched curriculum learning in history, art and design, geography, environmental studies, science, and maths.
- The sample HLF-funded projects seemed to be particularly successful in improving pupils' cross-curricular skills. These included literacy, numeracy, observation, thinking skills, group work and motor skills.
- There was evidence that participating in HLF-funded projects impacted on pupils' attitudes. Pupils enjoyed the experiences of visiting heritage centres/sites and also of working with heritage professionals. Teachers reported improvements in pupils' behaviour and self-confidence.
- Teachers also thought that their own skills and knowledge of various heritage areas increased from contact with HLF-funded projects, as did their confidence to incorporate new ideas into their teaching, especially in expressive arts.
- The introduction of parents and other members of the community to different areas of heritage was an unintended benefit of some HLF-funded projects (eg museums in Case Study 2; other cultures in Case Study 4; nature trails in Case Study 5; and built heritage trails in Case Study 8).

6: Emerging themes

6.1 Introduction

This final chapter focuses on the factors which contribute to the success of heritage education projects. Firstly, success criteria reported in three recently published studies of learning from museums and galleries are considered; secondly, those to emerge from this current study are presented; and finally, the conclusions and implications for policy and practices are suggested. The conclusions draw on evidence from the questionnaires completed by the 50 project organisers about the ways in which success is measured in the sample HLF-funded projects. The open responses and the case studies illustrate the range of approaches adopted.

6.2 Success criteria: Recent research findings

Three recently published studies shed some light on the factors, which may contribute to successful heritage learning (Downing *et al*, 2004; Hooper-Greenhill *et al*, 2004; and Morris Hargreaves McIntyre, 2004). In their study of 300 young people participating in the *Image and Identity Scheme* initiated by a consortium of six museums, Downing *et al* (2004) suggest that young people can learn effectively from museums, provided that there is:

- A strong theme
- Enjoyment in learning
- Use of galleries as locations for learning
- Encouragement to exhibit their own work
- Encouragement of young people to visit galleries; and
- The time needed to tailor effective projects to the time available.

In a qualitative study of the views of 60 children and young people in Manchester and Shropshire, Morris Hargreaves McIntyre (2004) argue that if museums and galleries are to increase their educational potential, they need adequate funding to allow them to:

- Work in partnership with other agencies and also young people
- Promote the removal of barriers to schools
- Make greater use of ICT
- Build capacity in the heritage sector
- Offer CPD to museum staff
- Embed *Inspiring Learning for All* (MLA, 2004) in their work because it provides a framework for outcomes-based learning from heritage.
- Improve the museum environment; and
- Support lifelong learning.

From a much larger study based on questionnaires completed by approximately 9000 school pupils and 500 teachers, and also on contact with numerous community workers, artists, writers and photographers, Hooper-Greenhill *et al* (2004) identify five factors which they think are associated with successful museum learning projects. These are:

- Limited innovation
- Strong museum-related ideas
- Appropriate management
- Project workers with appropriate skills and experience; and
- Participants' and partners' needs are meet.

Although not all of these criteria are relevant to heritage projects aimed at curriculum learning, there is some overlap between these indicators and the ones suggested by organisers of the 50 HLF-funded projects surveyed in the current research. These are considered below, firstly by looking at the ways in which project organisers elicited feedback and the criteria developed to assess projects.

6.3 Ways of assessing success

Most of the 50 project organisers in the current research used feedback of some sort, usually standard evaluation forms, to determine the success of their HLF-funded education projects. In addition to evaluation forms many encouraged informal feedback from teachers and participants (and, in one case, parents). For example, the education officer in Case Study 2 asked the pupils at the end of each session: 'What have you learnt today?' Other organisers maintained regular contact with headteachers, advisors and teachers. For example, Case Study 4 organised weekly monitoring meetings with the teachers involved in the maxi residency and also posted weekly updates on the staff room notice board so that other teachers were aware of progress. Participating teachers also provided feedback to their colleagues, headteachers and LEA. Some education officers reported that they interviewed participants, monitored the number of web hits, posted feedback forms on websites, and collated comments from project steering groups, photographs, records of work, children's letters and visitors' books. Participants' comments were made into booklets; and pupils and teachers were also involved in further development of resources, and surveys. Information was collected from letters of thanks received from schools and comment forms in museums. Some projects undertook peer reviews, or used external evaluators for a final review. Some used market researchers on a continuous basis. As can be seen project organisers used a wide variety of methods to determine the success of their HLF funded projects and although this is to be encouraged as it allowed projects to be responsive to pupils/young people's needs, it often resulted in the collection of large amounts of data which were difficult to analyse. HLF might wish to consider developing a standard evaluation template to facilitate this process and ensure consistency.

6.4 Indicators of successes

From these various sources of feedback, the 50 project organisers were able to identify the factors which they believed contributed to the success of their HLF-funded projects. In sum, these are:

- *Marketing*: expanding audiences; more repeat visits; improved take-up by schools; development of new programmes; increased access to collections; engaging the excluded; positive experiences; school enthusiasm; raised awareness; development and high take-up of learning resources.
- *Educational*: increased out-of-classroom teaching; taking thinking skills beyond formal education into lifelong learning; giving children an accredited qualification; increased teacher confidence.
- *Staffing*: enthusiastic heritage staff; offering staff training and development, including development of work experience placements to widen heritage staff's and teachers' perspectives.
- *Working in partnership*: partnership working with many agencies; community involvement; increased local profile; contribution to LEA objectives.
- *Creativity*: continued existence of artworks produced by pupils.
- *Evaluation*: positive evaluation by others.
- *Financial*: sustainability of project; securing additional funding; completing the project on time.

It is interesting to note that only two of the 50 organisers gave *sustainability* or *securing additional funding* as signs of a successful project and we suspect that this is related to the difficulties project organisers reported in securing funding for the continuation of their projects

6.5 What could be improved?

How can HLF-funded projects be improved? This question was put to the 50 organisers, and 43 of the 50 (86%) identified ways in which they believed improvements could be achieved. The following areas for improvement were suggested:

- *Staffing:* more staff to meet demand; projects should use fixed-term contracts for newly qualified staff, rather than employ consultants in order to give staff work experience and build capacity.
- *Training*: improved staff skills; more INSET for teachers to enable them to act independently of museum staff; more use of self-directed resources by teachers.
- *Funding*: longer-term funding; more funding; sustainability (one respondent); rolling the project forward (one respondent).
- *Resources*: better facilities, more classroom space and storage areas; outdoor shelters; improved access; websites; improved take-up of loan boxes.

- *Marketing*: better publicity coverage; reaching hard-to-reach audiences.
- *Communication*: communication with the community; within the organisation, a greater understanding of the project and HLF's requirements.
- *Transport*: including the cost of transport as the project is not accessible to some socio-economic groups (one respondent).
- The avoidance of 'tight deadlines' which allows the project organisers sufficient time to plan activities.

Some of the case study informants suggested that the terms and conditions under which staff were employed on projects could be improved. For example, the project organisers in Case Studies 2, 4, 5, 6 and 8 thought that fixed-term funding resulted in the lack of a career structure for education officers. Case Study 2's organiser also indicated that the lack of supply cover for her post could result in the cancellation of school visits.

6.6 What helped?

Forty-five (45) of 50 respondents (90%) identified factors that had helped them implement their HLF-funded projects. The following factors were cited:

- *Partnerships*: support from partners including Education Action Zones (EAZs), LEAs and museum staff; support from site owners and local people; working closely with teachers; the HLF steering group; the HLF grants officer; access to resources of other organisations already working in the field.
- *Marketing*: market research: dialogue with target audiences; word of mouth.
- *Funding*: obtaining initial and additional funding; schools' flexible budgets; funding from other sources.
- *Staffing*: the right staff; staff dedication, professionalism and enthusiasm; teamwork; use of experts; involvement of professional role models; support from consultants.
- *Educational*: knowledge of schools/curriculum.
- *Resources*: improved facilities.

6.7 What hindered?

Forty-four (44) of 50 respondents (88%) regretted the fact that certain factors had hindered the development of their projects. The following factors were cited:

- *Partnership issues*: difficulty of co-ordinating partners and participants; lack of understanding from potential partners; lack of a core focus for the project; '*a lot of strands to the project – not possible to focus on any one target group*'; difficulty of working effectively with teachers.

- *Staffing*: continued involvement with other projects; confusion of responsibilities with consultants; staff changeover six months into project; being a one-person department with little back-up from a shrinking number of museum staff; staff needs underestimated; use of short-term contract staff; distance between project and London-based project designers.
- *Financial*: budget constraints; funding too short-term; lack of core funding; demands of other funders; too little funding for further promotion; lack of the continued funding meant that the last year of the project ran into difficulties; management costs not met by HLF; reliance on external funding.
- *Educational*: difficulty marrying prescriptive curriculum to activities; difficulty of delivering the programme within the academic year; need to trial educational materials – '*too lengthy*'.
- *Resources*: lack of time; very administratively heavy at times; poor underlying documentation of collections (in relation to assembling loan boxes); lack of basic facilities; lack of space; copyright issues; difficulty of accessing affordable translation services; lack of a contact database to manage schools contacts; demand exceeding capacity/volume of work involved.
- *Contingency:* weather; travel restrictions due to foot and mouth outbreak.

Difficulties with staffing were highlighted by some case study informants. The organiser in Case Study 4, an arts charity, pointed out that: *'supply teachers could create problems for the projects, especially with behaviour management in schools'.* This was confirmed during the observed visit, when the school admitted that the timetable had been altered so that the researcher did not observe the artist working with a class which had a supply teacher.

6.8 What would you do differently?

Forty (40) of 50 respondents (80%) identified ways in which they would overcome these difficulties if they were to begin another HLF-funded project. These suggestions might be of help to new project organisers. The following advice was given:

- *Planning*: do not try to do too much; be less ambitious; allow more time for assembling resources ('*think of a timescale and double it'*); better time management; undertake more front-end evaluation; undertake any conservation work required at the beginning of the project; refine details of delivery; involve schools in initial planning; involve front-line staff in working up applications; visit other sites first.
- *Partnerships*: spend more time developing partnerships; define role of partners at a very early stage; be more aware of the problems raised by having a number of different funders.
- *Management*: ensure that one person has overall responsibility for the project; use fixed-term contract staff; include a budget for sufficient staff to support educational visits; bring in a writer from the beginning; hire more

staff; engage in more skill sharing with teachers rather than direct delivery to pupils, in order to make the project more sustainable; be prepared for paperwork.

- *Marketing*: develop a small-scale repeatable programme of events that schools can relate to.
- *Financial*: allocate funds for a 'cross-partner' [multi-partner use] vehicle; request more capital funding; revisit and improve the budget as lessons are learned; include impact of expansion of project in application, ie costs of increased premises.

As can be seen, most of these suggestions from the 50 project organisers focus on how the planning, organisational, marketing and financial aspects of HLF-funded projects might be improved: there appears to be an implicit assumption, that if these issues are addressed then educational outcomes will improve. This may or may not be the case. In contrast, feedback from participating teachers tended to focus on possible educational improvements. For example, a teacher participant in Case 6, an industrial site, thought that *'on reflection there could be more whole-class discussion at the site using some of the students' newly acquired vocabulary about types of climate'.* Another teacher participant, in Case Study 2, suggested that the time allocated to pupils working on worksheet activities in the museum gallery was too long, given the size of the museum's collection. Teachers in Case Study 4 were more proactive, and were able to offer their educational expertise as they worked alongside the project's artists. This created a better articulation of heritage and curriculum-linked learning.

6.9 Conclusions

HLF funding was being used in numerous creative ways within the 50 sample projects to offer pupils educational opportunities based upon HLF's five heritage areas. The degree to which each project was successful in impacting on curriculum-linked learning was to a certain extent dependent upon the particular combination of idiosyncratic factors present within that project: the skills and enthusiasm of staff, the resources available to them, and their established networks varied enormously. However, from the available evidence, we think that certain factors increase the likelihood of a heritage project impacting successfully on curriculum-linked learning. These are:

- *A strong idea*: the starting point for successful projects (exemplified in Case Studies 3, 4, 7 and 8) was usually a strong idea that was capable of being developed into a sustained educational theme which linked to what schools were trying to achieve for their pupils. Case Study 3 concentrated on personal testimony; Case Study 4 on Chinese cultural heritage; Case Study 7 on sustainable development; and Case Study 8 on the local historic built environment. These strong ideas not only provided a focus for project organisers, making it easier for them to manage, but also created a more direct link with areas and subjects in the school curriculum.

- *A clear link between the heritage resource and the curriculum*: although we accept that children and young people can appreciate and gain pleasure and develop affectively from heritage resources by seeing, touching or hearing about cultural artefacts, we think that these should be carefully chosen so that they link directly to areas of the curriculum and support the development of a strong idea.
- *A strong partnership between heritage organisations and schools*: All 50 HLF funded projects reported that they worked in partnership with other organisations, typically citing other heritage organisations or agencies. Ironically, most believed that partnerships both increased the success of projects but also contributed to their failure if they were not managed well. We formed the view that projects which worked in partnership with schools were more successful in achieving their educational outcomes than those which established partnerships with other agencies or museums in the heritage sector and offered schools an already developed 'menu' of heritage activities. Joint planning and communication with teachers are key to success. Other heritage partners may increase the level of resources and access available to the HLF-funded projects, but this may only exacerbate the problem of embedding heritage into curricular learning if the essential links with schools are under-developed.
- *Enthusiastic staff who have high quality skills and knowledge*: All of the 50 projects stressed the importance of being able to draw on the skills and knowledge of well-qualified, enthusiastic staff. Case Study 4 in particular attributed its success to the arts management expertise of project managers combined with the artistic talents of the various artists that pupils and teachers were able to recognise. Some project organisers were concerned that fixed-term contracts not only demotivated staff but also inhibited capacity building in the heritage sector. From the case studies, we formed the opinion that projects which could draw on the expertise of heritage professionals and had access to staff with teaching skills (eg Case Studies 2, 4, 5, 7 and 8) were better able to tailor their efforts for maximum impact on the formal curriculum.
- *Outreach* work (ie working beyond the confines of museums, galleries, historic sites or national parks): For many of the HLF-funded projects the starting point appears to have been a particular museum, gallery, historic site, or national park which the project organisers wished to make available to schools. We do not under-estimate the value of these new experiences for children and young people. However, the dangers inherent in this approach are that success becomes defined in terms of attendance figures (ie the number of pupil/visits per week), which diverts attention from educational outcomes, and teachers are also expected to make the connections to the curriculum through pre- and post-visit work in the classroom. We think that projects based on outreach work with schools (eg Case Studies 4, 5, 7 and 8) in which heritage professionals and teachers worked collaboratively produced outputs that were better integrated into curriculum-linked learning than those which were based on heritage buildings or historic sites. Transference of learning from the visit to the

museum, gallery or historic site to the curriculum was, therefore, not a problem.

- *Experiential learning:* Hands-on activities were identified by most survey respondents as the most successful activity offered by the 50 HLF-funded projects. This is confirmed by case study informants, teachers and pupils. We conclude that projects which offered pupils the opportunities to learn experientially, rather than aiming to improve their theoretical knowledge, were enjoyed more by pupils, and therefore were more likely to have a lasting effect on what pupils think and feel about heritage. Although the published literature suggests that constructivist approaches to heritage education in which children/young people are encouraged to develop their own meanings for heritage sites and artefacts are successful, it was difficult to detect any evidence from this study that project organisers were using such an approach. It would require heritage professionals asking not only 'What have you learnt today?' but also 'What does it mean to you?' We did, however, see excellent examples of experiential learning, eg. Case Studies 1, 6 and 8, in which children were seeing, touching, researching, analysing, interpreting, drawing, painting, dancing, writing about and generally participating in heritage education linked to curriculum topics. These have the potential to develop the three domains of learning: cognitive, affective and psychomotor.
- *School-based INSET*: Nineteen of the 50 HLF funded projects indicated that they offered teachers continuing professional development. Typically, this took the form of teachers' packs and/or formal CPD courses. Some informants (eg Case Studies 4 and 8) mentioned that these were organised in conjunction with LEA advisors, and Case Study 4 also charged teachers and artists for CPD. A very strong case can be made for developing teachers' professional knowledge and skills in the heritage areas further. Some of the participating teachers pointed out how little time is devoted to this topic during initial teacher training. However, from the case studies we observed in which teachers worked alongside artists or heritage professionals (Case Studies 4, 5, 7 and 8) learning experientially rather than attended formal CPD courses, teachers appeared more confident about integrating what they had learnt into their teaching practices, especially in the expressive arts.
- *Support from headteachers and LEA advisors*: A number of informants indicated that their projects were supported by LEA advisors and/or headteachers. Case Study 8 operated with very well established contacts with the Education and Library Boards. One headteacher thought that although the maxi residency took up a lot of school time, the 'spin off' benefits for the whole school were worth the investment. We think that HLF projects are more likely to have a lasting impact in schools in which LEA advisors and headteachers support the heritage partnerships and create an ethos in which staff are encouraged to participate and to share what they have learnt with other staff.
- *Joint monitoring and evaluation*: Most of the 50 HLF-funded projects received feedback on their activities from participants. Implicit in soliciting feedback is a willingness to modify and develop the projects further to

meet the needs of participants. One project organiser reported modifying project activities by reducing the time allocated to sessions and the amount of detail on worksheets. We think that regular joint monitoring and evaluation between project organisers and teachers using agreed indicators of success would increase the chances of HLF-funded projects improving pupils' curricular knowledge and cross-curricular skills and attitudes. Further guidance on this can be found in two publications: *What Did You Learn at the Museum Today?* (Hooper-Greenhill *et al*, MLA, 2004) and *Inspiring learning for All* (MLA, 2004) which provides a framework for outcomes based education.

6.10 Implications

There are clear implications for policy and practice which project organisers highlight. The evidence suggests that in order to establish strong curriculum links, heritage education project organisers should:

- *Consult*: with organisations already in the field; with teachers; with the community; with other recipients of HLF funding; work with similar organisations to share good practice; keep everyone informed; and importantly '*make life easier for teachers who are under enormous pressure'; 'make* [the project] *fun'*.
- *Plan*: six months in advance; advertise opportunities to teachers before the beginning of the academic year; talk to HLF as soon as possible about potential funding; fit with the LEA objectives, the school curriculum and the needs of visitor groups; make a monthly action plan; have a good resources budget; don't forget hidden costs, eg stationery, phone, travel; develop a good wet-weather plan; prepare for long-term commitment and mid-term 'blues'; be prepared to work around obstacles.
- *Grow*: *'slow but sure'*; build on what you know; be very clear about objectives and learning outcomes; define target audience and promotion budget; '*know your audience*'; have a strategy for sustainability; concentrate on quality time with a few schools over time to really make an impact; be willing to change as you learn more; be focused; be realistic; involve the audiences at all stages and listen to them; keep good records.
- *Use of staff*: ensure that there is a clear allocation of responsibilities, job descriptions and person specification; clear procedures and management structure; have a good project leader; be realistic about calls on time; use professionals to ensure your project resources stand out; use consultants; use other's expertise; give teachers some ownership and do not do everything for them; *'do not rely on teaching staff for the project to succeed*'.

In addition, we think that policy makers may need to rethink and better articulate their concept of sustainability. The term was not well understood by the 46 of the 50 respondents (92%) who answered the survey question. Some thought that new avenues for development had arisen from HLF-funded projects. One respondent said she did not understand the question and in several cases, it was left blank. A number responded negatively that no future avenues

for development had opened up as a result of the HLF funding. Some respondents said it was too early to comment. Others stated that they saw the project as a pilot for trialling approaches to delivery, fund-raising and partnership working. Some simply said '*yes*' or '*hopefully*' or '*would like to do more'*. There was, however, evidence from some of the case studies (eg Case Studies 2, 7 and 8) that teachers' practices had changed as a consequence of participating in an HLF-funded project and, therefore, the projects' ideas would be taken forward without recourse to further grant-aid.

6.11 Summary

In summary:

- Most of the 50 projects elicited feedback from participants, although the methods used varied widely depending on the type of project and the commercial expertise of management. HLF might wish to encourage project organisers to use fewer, more easily managed methods.
- The major indicator of success cited by the organisers of the 50 projects was an increase in take-up: sustainability was rarely mentioned as an indicator of success, but did appear more frequently as an aspect that could be improved. Projects should be encouraged to establish educational success criteria.
- Partnership working was identified by project organisers as both a helping and hindering factor. There was, however, some evidence that partnership working had been harder to manage than anticipated, although it was often cited as a factor that helped the project. The roles of different partners should be made more explicit.
- Similarly, staffing was both a helping and hindering factor. Staff skills had not always been as required, but skilled staff were frequently cited as critical to the project's success. There may be a need to develop staff capacity within heritage education.
- The majority of projects (36 of the 50: 72%) had not experienced staff recruitment and retention difficulties but 11 of the 50 (22%) had. Some were concerned about the use of fix-term contracts of employment. Staff terms and conditions within heritage education may need to be reviewed.
- Organisers highlighted the importance of better/more planning, consulting stakeholders, and partnership working if they were to begin another HLF-funded project. HLF may wish to offer business planning guidance to potential applicants.
- There were two schools of thought about the role of teachers. While all of the sample organisers agreed they should be involved in planning the projects, several thought that teachers needed to be taught how to be more autonomous, rather than expecting project staff to do everything for the group. Teachers and heritage professionals should work in partnership.

- The 50 project organisers expressed a range of views about the sustainability of HLF-funded projects: most were optimistic. Many respondents assumed that the project would be mainstreamed into the museum or local authority's budget; however, we have no evidence to support this optimism. HLF may wish to clarity its concept of sustainability.
- The 50 project organisers expressed both positive and negative views about new avenues which had resulted from HLF-funded projects. The most positive perceived the HLF-funded projects as pilots for future development if funding were available. In contrast some had already made staff redundant because they had been unable to generate new sources of funding at the end of their HLF grant. The role of short-term funding may need clarifying.

We conclude that to increase the likelihood of impacting on pupils' curriculum-linked learning projects need:

- *A strong idea*
- *A clear link between the heritage resource and the curriculum*
- *A partnership with schools*
- *A combination of skills and knowledge*
- *Outreach work*
- *Experiential learning*
- *School-based in-service*
- *Support from headteachers and LEA advisors, and*
- *Joint monitoring and evaluation*.

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Appendix A1: Details of literature search strategy

A1.1 Search strategy

Three databases, the British Education Index (BEI), Educational Resources International (ERIC), and the Social Science Citation Index (SSCI), were searched electronically and current periodicals were also hand searched iteratively in order to identify articles and reports about the links between heritage and formal education. The criteria for inclusion of studies in this review are as follows:

- Studies concerned with 'heritage' (including the use of museums, galleries, libraries, natural environment, industrial archaeology, documentary collections and oral traditions).
- Studies emanating from the UK, other European countries and the USA: evidence from developing countries or articles not written in English have been excluded.
- Policy documents and reports from, for example, the Department for Culture, Media and Sports and Office for Standards in Education (Ofsted)/Her Majesty's Inspectors of Education (HMIE).
- First-hand descriptions of incorporating heritage into the curriculum.

Preference was given to reports published in peer reviewed journals within the past 10 years. We have also attempted to include articles from journals which serve a range of different academic disciplines and curricular areas, such as history, environmental studies, art, music, language, and tourism.

A1.2 Search terms

#	Search term	ERIC	BEI	A&HCI / SSCI
#1	heritage	417	31	2,720
#2	cultur*	18,717	2,451	21,958
#3	school* OR pupil* OR education* OR learn* OR curricul*	159,887	47, 584	54,400
#4	(#1 OR #2) AND #3	15,864	2,090	3,319
#5	visit* OR trip* OR participation* OR inclusi* OR exclusion OR public OR curat*	26,689	2,447	26,880
#6	museum* OR galler* OR site* OR archiv* OR librar* OR collection* OR environment* OR natur*	37,527	3,955	11,824
#7	#5 AND #6	5,932	244	1,655
#8	#4 AND #7	534	24	48
#9	#8 NOT higher education	381	21	47

Notes:
ERIC = Educational Resources Information Centre
BEI = British Education Index
A&HCI = Arts and Humanities Citation Index
SSCI = Social Sciences Citation Index
* = wildcard search character(s) to allow for different word endings, plurals etc.

Appendix A2: Overview of revised sample of 50 educational Heritage Lottery Funded projects

No.	Region/country	Project title	Applicant	Educational Sector	Heritage areas	Grant awarded	Status completed
1	London	Wildlife for All	RSPB and Royal Parks Agency	P&S	Land	323,500	No
2	London	Heritage Open Days Audience Development Program	The Civic Trust	P&S 16+	Build	335,000	No
3	London	National Gallery Touring Exhibition Partnership	The National Gallery	P&S 16+	Mus	363,500	No
4	London	Cultural Cooperation Year Round Education Project	Cultural Cooperation	P&S	Intang	409,000	No
5	London	Hackney Building Exploratory Project	Hackney Building Exploratory	P	Mus	65,300	Yes
6	London	Victorian Thames	Thames Explorer Trust	P	IMT	40,300	Yes
7	North East	Tynedale Learning Links project	Tynedale Council	16+	Build	48,200	No
8	North East	Summerhill Landscape Interpretation project	Hartlepool Borough Council	P&S	Land	80,000	No
9	North East	Marking the Wall: Education and Outreach	Newcastle City Council	16+	Build	335,000	No
10	North West	Forest of Bowland Community Education Officer	RSPB	P	Land	77,200	Yes
11	North West	Alderley Edge Landscape Project: Heritage & Educational Resources (AELPHER 2000)	Manchester Mus, University of Manchester	P&S	Mus	90,000	Yes
12	North West	Access Heritage: Stockport	Stockport Met Borough Council Heritage Services	P&S 16+	Mus	90,000	Yes
13	North West	Cuerden Valley Park Restoration	Lancashire Wildlife Trust	P	Land	1,100,500	No
14	North West	Hands-On Heritage	Groundwork West Cumbria	P	Land	87,000	No
15	South East	Priestlands Heritage Project	Hampshire Gardens Trust	P&S	Land	72,400	No
16	South East	Hawthorns Urban Wildlife Centre	Southampton City Council	P&S	Land	83,668	Yes
17	South East	Haslemere Educational Mus	Haslemere Educational Museum	P	Mus	88,000	Yes
18	South East	Community Heritage Project	Slough Museum	P&S	Mus	58,200	Yes
19	South East	A Sense of Time and Place	Learning Through Landscape	S	Land	89,900	Yes
20	South West	National Organic Education	Soil Association	P&S	Land	72,400	No
21	South West	Chippenham Museum & Heritage Centre: Next Phase	Chippenham Town Council	16+	Mus	260,500	Yes
22	South West	Archaeology, A levels and archives	Museum of South Somerset	S&16+	Mus	15,940	Yes
23	South West	Dorset Community Museum Access Programme, 1999	Dorset Community Museum	P&S	Mus	88,000	Yes
24	West Midlands	Life Long Learning – Naturally! – Hereford	Madley Environmental Study Centre	P&S 16+	Land	83,200	No

Key:
Stages: P=Primary; S=Secondary; N/S=Not Specified; 16+=Post-16

Heritage areas: 1. Build = Historic buildings, monuments and archaeological sites; 2. IMT = Industrial, maritime and transport collections and sites; 3. Intang = Intangible heritage, such as cultural traditions, oral history, language; 4. Land = Land and biodiversity including parks, designed landscapes, countryside, habitats, and priority species in the UK Biodiversity Action Plan; 5. Mus = Museums, galleries, historic library collections and archives.

No.	Region/country	Project title	Applicant	Educational Sector	Heritage areas	Grant awarded	Status completed
25	West Midlands	Vegetable Kingdom	Henry Doubleday Research Association	P&S	Mus	988,000	No
26	West Midlands	Natural Connections – Birmingham and the Black Country	Wildlife Trust for Birmingham and the Black Country	P&S	Land	79,700	Yes
27	East Midlands	Beth Shalom	Holocaust Centre, Beth Shalom	P&S	Mus	314,000	No
28	East Midlands	Nature Detectives	The Woodland Trust	P&S	Land	373,500	No
29	East Midlands	Education Service (Guru Nanak Sikh Museum	Guru Nanak Sikh Museum Leicester	P KS2	Mus	89,800	No
30	East Midlands	Making Natural Connections	Derbyshire Wildlife Trusts	P&S	Land	89,900	No
31	East of England	Tate Partnership Scheme	Norwich Museums Service	P&S 16+	Mus	31,500	No
32	East of England	Introducing Traditional Building Skills to school children	CITB	P	Intang	69,001	No
33	East of England	'Imagine' Outreach Thetford	Norfolk Museum Service	P	Mus	86,300	Yes
34	East of England	Museum of Classical Archaeology	University of Cambridge	P&S 16+	IMT	35,500	Yes
35	Yorkshire and the Humber	Abbeydale Industrial Hamlet, Sheffield	Sheffield Industrial Museums Trust	P	IMT	89,400	No
36	Yorkshire and the Humber	New Horizons, Craven Museum	Craven District Council	P	Mus	79,800	No
37	Yorkshire and the Humber	Clarke Hall – Giving the Past a Future	Clarke Hall Educational Museum	P&S 16+	Build	336,600	No
38	Yorkshire and the Humber	Thackery Medical Museum	Thackery Medical Museum	P&S	Mus	—	Yes
39	Scotland	Nadair Trust Landscape Partnership Programme	NADAIR Trust	P&S	Land	2,003,000	Yes
40	Scotland	Sustainable Development in Scottish Secondary Schools	Learning and Teaching Scotland with consortium	S	Land	227,395	No
41	Scotland	The Recording, Conservation & Promotion of the Oral & Cultural Traditions of Scottish Travellers	The Elphinstone Institute; University of Aberdeen	P&S	Intang		No
42	Scotland	North Ayrshire Museum and Education Outreach	North Ayrshire Council	P&S	Mus	79,500	No
43	Scotland	Hunterian Art Gallery Goes Into Schools	HAGGIS	S	Mus	–	No
44	Wales	Comeston Environmental Enhancement Project	Vale of Glamorgan Council	P&S KS1–3	Land	85,000	No
45	Wales	North East Wales Joint Area Museum Education Service	Conwy County Borough Council and Denbighshire County Council	P&S 16+	Mus	190,700	Yes
46	Wales	Bodelwyddan Castle Trust	Bodelwyddan Castle Portrait Galleries Refurbishment	P&S	Mus	255,500	Yes

No.	Region/country	Project title	Applicant	Educational Sector	Heritage areas	Grant awarded	Status completed
47	Northern Ireland	NIFC: Development Officer	Northern Ireland Film and Television Commission	S	Mus	95,200	No
48	Northern Ireland	Trees of our Future	Conservation Volunteers Northern Ireland	P&S	Land	109,500	Yes
49	Northern Ireland	An Creggan Education Services	An Creggan Visitor Centre	P	Land	100,000	Yes
50	Northern Ireland	Ulster Architectural Heritage Society Education programme	Ulster Architectural Heritage Society Charity	P	Build	87,300	Yes

Appendix 3: Profile of revised sample of 50 educational Heritage Lottery Funded projects[1]

Regions/countries	Total No.	Heritage areas											Grant size £	Completed No.
		P	S	P&S	S&16+	16+	P,S&16+	1. Build	2. IMT	3. Intang	4. Land	5. Mus		
London	6	2		2			2	1	1	1	1	2	40,300–409,000	2
North East England	3			1		2		2			1		48,200–335,000	0
North West England	5	3		1			1				3	2	7,000–1,100,000	2
South East England	5	1	1	3				1			3	2	58,200–89,900	5
South West England	4			2	1	1					1	3	15,940–260,500	3
West Midlands	3			2							2	1	79,700–988,000	1
East Midlands	4	1		3							2	2	89,800–373,500	0
East of England	4	2					1		1	1		2	31,500–86,300	2
Yorkshire and the Humber	4	1		1					1			2	79,800–336,600	1
Scotland	5		2	3						1	2	2	79,500–2,003,000	1
Wales	3			2							1	2	85,000–255,500	2
Northern Ireland	4	2	1	1				1			2	1	87,300–109,000	3
TOTAL	50	0	2	11	0	2	1	6	3	3	18	21		21

Key:
Stages: P=Primary; S=Secondary; N/S=Not Specified; 16+=Post-16

Heritage areas: 1. Historic buildings, monuments and archaeological sites; 2. Industrial, maritime and transport collections and sites; 3. Intangible heritage, such as cultural traditions, oral history, language; 4. Land and biodiversity including parks, designed landscapes, countryside, habitats, and priority species in the UK Biodiversity Action Plan; 5. Museums, galleries, historic library collections and archives

[1] Breakdown is incomplete as information is not specified by all projects.

Appendix 4: Annotated questionnaire

UNIVERSITY of GLASGOW

the SCRE Centre research in education

Evaluation of the impact of Heritage Lottery Fund funding for curriculum-linked learning for 5–19 year olds

Annotated Questionnaire for Project Co-ordinators

Unless otherwise specified the number of respondents is given for each question
Response rate of 100%: 51 responses from 50 projects
[Percentages can be calculated by doubling raw returns]

Section 1: General information

1.6 Were you involved in submitting the HLF application?

Yes 25 No 25

Section 2: About the project

2.1 When did the HLF funding of your project begin and when did/will it end?
Please give a month and year if possible

.

START RANGE:	END RANGE:
Sept 1995 – June 2004	March 1997 – June 2007

2.2 What does/did your HLF award fund? *eg staff, materials, spaces. Please give details.*

What/who? STAFF	For what purpose?	Range of costs
Staff: 46 responses Other types of resources: 46 responses	44 responses	£11,000–£12,000,000

2.3 What are/were the key educational aims of your HLF project? (eg to offer a targeted programme of half day workshops using handling objects for Key Stage 2 pupils within a 50 mile radius of our site) *Please write below.*

49 open responses

2.4 How is heritage learning organised in your project? *Please tick all boxes that apply.*

short sessions	38	long-term with one class	16	developing classroom teachers' skills	26
work with target groups	31	*Other please specify:*	18 open responses		

2.5 Are you aiming to provide heritage learning which is…? *Please tick one box.*

additional to the curriculum	2	embedded in the curriculum	15	both	33

2.6 What curricular subjects does/did the project best articulate with? *Please tick all boxes that apply.*

Main curriculum areas and other subjects	Nursery/ Primary only	Secondary only	FE only	Teacher Training only	Combination of levels
English	6	2	1	0	12
Mathematics	2	0	0	0	7
Science	9	2	0	0	17
Design & Technology	7	4	0	0	6
Information & Communication Technology (ICT)	2	0	0	0	4
History	8	1	0	0	23
Geography	9	2	0	0	15
Modern Foreign Languages	1	1			1
Art & Design	6	2	1		21
Music	2	2			3
Physical Education	1				1
Dance	2	2		2	2
Drama	7	2		1	6
Citizenship	4	2			15
Personal, Social & Health Education	5				7
Religious Education	6	1			4
Creativity/Creative Development	6	2			14
Literacy	7				16
Numeracy	4				12
Architecture	4				3
Craft	7	2			10
Environmental Studies	6	1			17
Education for Sustainable Development	3	1			15
Fashion	3	1			5
Local History	9	3			20
Archaeology	6	1			14
Oral History	6	1		2	7
Social History	6	2			12
Photography	2	1		1	7
Video	1	1	1	1	6

Other *(please specify)* 6 open responses

Main curriculum areas and other subjects	Nursery/ Primary only	Secondary only	FE only	Teacher Training only	Combination of levels
Other activities					
Continuing Professional Development for teachers	4	1	1	5	14
Individual research	2	1	2	2	8
Laboratory work	1	1			
Seminars & lectures	1		4	1	8
Loan boxes	2			1	10
Dressing up/role play	9				10
Working on the Internet	2				8
Storyteller	3				14
Pond dipping	3	1		2	10

2.7 To what extent are the educational spaces at your site suitable for different learning styles? *Please tick one box per line.*

	Very suitable	Adequate	Poor	Not applicable
Formal	22	11	3	13
Informal	28	9	1	11
Self-directed	15	15	2	15
Theoretical	7	13	6	20
Practical	21	12	7	10

2.8 If funded by HLF, how successful are/were the following resources or activities?' *Please tick one box per line.*

	N/A	Partially successful	Reasonably successful	Very successful
Workshops led by artists (eg writers, painters and musicians)	17		3	23
Lectures	25	1	4	10
Guided tours	17		8	18
Access to restricted areas/collections	26	2	6	7
Hands-on access to resources/ materials	12	2	5	27
Pre-visit notes for teachers	14	3	16	12
Printed learning materials for children/ young people	12	2	12	18
Website based resources for teachers	25	3	4	10
Website based resources for children/ young people	27	4	3	7
Interactive technology on site	28	1	6	6

cont'd	N/A	Partially successful	Reasonably successful	Very successful
Webcam installations on site	36		1	3
Outreach services (include visits to schools)	15	3	6	21
Field trips*	24	1	1	17
Courses for professionals* (eg teachers)	18	4	10	11
Courses for young people*	29	2	3	4
Work placements for young people	27	3	3	5
Loan boxes	27	2	5	9
Worksheets	16		7	17
Investigative activities	12		7	21
Role play	24		2	13
Other*	17		1	4

• *Please specify:* 26 open responses

2.9 What other organisations, if any, are/were involved in delivering your project? *Please write below.*

39 open responses

Section 3: Marketing

3.1 How have you promoted your HLF project to your target audiences? *Please write below.*

51 open responses

3.2 Which educational visitors/participants are targeted by your HLF project? (eg primary, secondary, college students and teachers) *Please write below.*

50 open responses

3.3 Does your HLF project target particular groups? *Please tick the relevant boxes below.*

	Yes	No
Males	7	30
Females	6	30
Minority ethnic groups	14	23
	14 open responses	
Rural communities	15	24
Inner city communities	13	22
People from a particular estate	8	23
Students with special needs	16	21
Specific age groups	22	16
	28 open responses	

3.4 What information, if any, is/was sent out in advance of an educational visit? *Please write below.*

48 open responses

3.5 Please give a figure for the number of visitors/project participants in the last 6 months (or in the last 6 months of the project if it is complete) aged 5–19 and in formal education? *Please write below.*

47 open responses

If you keep records of your visitor numbers and would be willing to share the figures with us, please append a copy to your completed questionnaire.

12 attached records

3.6 Which of the following statements is closest to the position of your project regarding usage by educational visitors/participants? *Please tick one box.*

The project is heavily undersubscribed	
The project is sometimes undersubscribed	11
The project is about right in terms of capacity	17
The project is sometimes oversubscribed	13
The project is heavily oversubscribed	6
Don't know	4

3.7 What percentage of your formal learners in the last 6 months represent(ed) repeat visits/participants? *Please tick one box.*

Up to 10%	6
Up to 25%	3
Up to 50%	9
Up to 75%	7
Up to 100%	2
Don't know	10

Section 4: Finances

4.1 Do/Did you operate with a separate budget for educational work? *Please tick one box.*

24 No

26 Yes *If yes, please give details below*

22 open responses

4.2 Does/Did your project produce educational income? (eg charging schools for visits or materials) *Please tick one box.*

29 No

22 Yes *If yes, please give details below*

22 open responses

4.3 How much do/did you spend on each of the following as part of the project in the last financial year?

		Range £	Mean £	Median £
Staffing –	31 responses	277–87,500	29,000	20,000
Educational materials –	30 responses	300–27,000	6,000	4,000
Marketing –	23 responses	135–19,000	3,000	2,000
Staff travel –	24 responses	46–7,000	2,000	1,000

Section 5: Staff

The following questions relate to staff employed as a result of HLF funding.

5.1 How many staff are involved in the project's education work? *Please write below.*

Range of number of paid: 0–12	Range of number of volunteers: 0–29
(47 responses)	(21 responses)
Mean=3; Median=1	Mean=5; Median=5

5.2 Please complete the following table with details of each staff member.
We have completed the first three entries as examples.

Type of post		Range of Employment status		Range of Maximum Salary per annum	Highest qualification	
Education Officer	22 responses	FT	31 responses	£14,000–35,000	Degree	11 responses
Project Manager	10 responses	PT	21 responses	Mean=£21,000 Median=£19,000 (32 responses)	Teaching	16 responses
Other	22 responses	Other	13 responses		Combinations/Other	14 responses

5.3 Has the project experienced particular staff recruitment or retention difficulties?
Please tick one box.

36 No

11 Yes *If yes, please give details below*

Section 6: Access

6.1 What means of transport do visitors aged 5-19 in formal education use to reach your site? *Please tick relevant boxes.*

Organised coach/ minibus	34
Individual travel arrangements	13
Public transport bus/train	19
Other *please specify*	13 open responses

6.2 Does your project offer transport subsidies to visitors?

30 No

12 Yes *If yes, please give details below*

18 open responses

6.3 What does your education space <u>most</u> resemble? *Please tick as appropriate. Tick whether you believe the space to be good, adequate or poor. Also please tick if the space was HLF funded.*

	Space most resembles
a classroom	7
a seminar/lecture room	
a gallery or education area	9
an outdoor space	5
a studio	
an office	1
other space	2
combination	11

Please specify 17 open responses

Quality of space:

Good	16
Adequate	7
Poor	3

6.4 How do you rate the quality of the following facilities in term of design, location, capacity and suitability for your target audiences? *Please tick one box per line.*

Facility	Good	Adequate	Poor	Not applicable
Cloakroom or alternative	7	5	11	28
Toilets	3	20	10	18
Refreshment facilities	6	7	7	31
Space to eat packed lunch	12	6	14	19
Access for those with special needs	11	13	8	18
Storage space	5	10	16	20
Furniture that suits different kinds of user, eg age and size	5	16	7	23
Health and safety arrangements	23	11	2	15

Section 7: Measuring the success of your project

7.1 Outside the formal monitoring requirements of HLF, what procedures are in place to collect feedback from your education participants? *Please write below.*

51 open responses

7.2 What do you regard as the successes of your HLF funded project? *Please write below.*

50 open responses

7.3 Which aspects of your HLF funded project could be improved? *Please write below.*

43 open responses

7.4 What has helped the project? *Please write below.*

45 open responses

7.5 What has hindered the project? *Please write below.*

44 open responses

7.6 From your current position, what would you do differently if you were starting the project again? *Please write below.*

40 open responses

7.7 What advice would you give to someone planning a heritage learning project? *Please write below.*

46 open responses

7.8 What will/did happen when the HLF funding ends/ed? *Please write below.*

51 open responses

7.9 How sustainable will the project be/was the project? *Please write below.*

50 open responses

7.10 Have new avenues opened for development as a result of your project funding? *Please write below.*

46 open responses

7.11 Would you be willing for us to quote from your comments in any publication resulting from this research? *Please tick one box.*

By name	25	Anonymously	21	Not quoting at all	4

THANK YOU FOR COMPLETING THIS QUESTIONNAIRE

Now please return it in the pre-paid envelope provided to: Julia Davidson, The SCRE Centre (University of Glasgow), 61 Dublin Street, Edinburgh, EH3 6NL
by [date]

Appendix A5: Case Studies

CASE STUDY 1	
Focus of project:	Environmental enhancement and education programme
Heritage area	Land and biodiversity including parks, designed landscapes, countryside, habitats, and priority species in the UK Biodiversity Action Plan.
Region/country:	Wales
Target user groups:	Primary, secondary and special schools, and further education colleges
Informants:	Education Officer, 2 teachers from a family/school links programme, 5 parents, 5 Year 3/4 students: 4 girls and 1 boy
Photo/ Observation activities:	Half day visit for a Maths trail
Transport used on day of visit:	Minibus
Indoor space:	Interpretation Centre with visual displays which provide information about flora and fauna, and two interactive computer workstations.
Awarded:	£85,000 for an Education Officer and Interpretation Centre
Start date: October 2001	End date: October 2004

CASE STUDY 2	
Focus of project:	Development of education centre and resource room in civic museum
Heritage area:	Museums, galleries, historic library collections and archives
Region/country:	South West
Target user groups:	Primary and secondary pupils (K1, 2, & A/AS levels) and further education students, and their teachers
Informants:	Education Officer, Museums Officer, Teacher, Teaching Assistant, 2 Parents, 2 groups of 12 Year 5 pupils
Photo/observation activity:	1/4-day education session on World War II
Transport used on day of visit:	Local schools walked to the museum
Indoor space:	First floor education room plus use of ground floor museum space
Awarded:	£260,000
Start date: September 2002	End date: August 2005

CASE STUDY 3	
Focus of project	Appointment of education staff and development of educational resources in heritage centre
Heritage area:	Museums, galleries, historic library collections and archives
Region/country:	East Midlands
Target user groups:	Secondary and special schools, disaffected youth, adults, and senior citizens
Informants:	Director, Senior Education Manager, Research Fellow, 2 Education Officers, 5 teachers, 7 Year 10 boys and 20 Year 12 boys and girls.
Secondary data:	Draft Evaluation Response of students after visits to the site
Photo/ Observation activities:	In the morning, the Y10 students were divided into three groups and rotated around 3 educational activities: A video and group discussion in the main hall; a tour of the site and an exhibition. The Y12 students undertook private study in the Centre's library. After lunch there was a plenary session in the main lecture theatre.
Transport used on day of visit:	Chartered bus
Indoor and outdoor spaces:	Lecture hall, library, exhibition rooms, bookshop, café and gardens
Awarded:	£314,000
Start date: October 2001	End date: September 2004

CASE STUDY 4

Focus of project:	Cultural heritage
Heritage area:	Intangible heritage, such as cultural traditions, oral history, language
Region/country:	London
Target group:	Primary & secondary schools (Key Stage 1, 2, 3, 4) and CPD for teachers and artists
Informants:	Acting Head of Education, Headteacher, 1 focus group of 3 teachers, 1 artist, 4 groups of P 4 and 5 pupils
Photo/observation activities:	Artist maxi residency in primary school
Transport used on day of visit:	Outreach in schools
Indoor space:	None of own, use school halls and classrooms
Awarded:	£409,000
Start date: April 2003	End date: February 2006

CASE STUDY 5

Focus of project:	Environmental education
Heritage area	Land and biodiversity including parks, designed landscapes, countryside, habitats, and priority species in the UK Biodiversity Action Plan
Region/country:	North West
Target groups:	Primary and secondary schools, Key Stages 1, 2 3 & 4 Science, History, Art & Design, Drama, Citizenship, Personal, Social & Health Education, Craft, Education for Sustainable Development
Informants:	Project Manager, project worker, teacher, two classroom assistants, National Trust worker, two groups of Year 1 pupils (4 girls; 5 boys)
Transport used on day of visit:	Host organisation's mini-bus
Indoor space:	None; uses natural environment
Awarded:	£87,000
Start date: April 2002	End date: March 2005

CASE STUDY 6

Focus of project:	Industrial heritage
Heritage area:	Industrial, maritime and transport, collections and sites
Region/country:	Yorkshire and the Humber
Target user groups:	Primary, secondary and special schools, disaffected young people and community groups, minority ethnic groups and Pupils with English as an Additional Language.
Informants:	One Education Officer and another member of staff, 2 teachers, a teaching assistant, a special educational needs assistant and 3 adult volunteer helpers (one mother, one father and one grandfather). Two classes of Year 5 students from a local primary school visited the project, one class in the morning and the other in the afternoon: this involved a total of 21 girls and 24 boys.
Photo/ Observation activities:	Activities focused on science and involved the use of a thinking skills framework with a whole class introduction followed by group work and a final plenary session.
Transport used on day of visit:	Local public bus
Indoor and outdoor spaces:	Office, shop, classroom, outdoor courtyard, gardens and stone workshop buildings dating from the eighteenth century.
Awarded:	£89,400
Start date: September 2002	End date: September 2005

CASE STUDY 7	
Focus of project:	Sustainable development
Heritage area	Land and biodiversity including parks, designed landscapes, countryside, habitats, and priority species in the UK Biodiversity Action Plan
Region/country:	Scotland
Target user groups:	Secondary school students and the school community
Informants/Observation session:	Principal Education Officer and Schools Co-ordinator, Environmental Science Education Organiser, 3 teachers from Science, English and Design and Technology, Librarian, Computing Support Officer, and students in two mixed-sex secondary schools.
Secondary data:	Dissemination; Newsletter March 2003
Photo/ Observation activities:	Two S1 classes: one class was working in small groups in the computer suite designing a websites about the past and the future in the local area; in another S1 class pupils were observed giving group presentations to the rest of the class, using an electronic whiteboard, to demonstrate some of the material on their websites.
Indoor and outdoor spaces:	Library and classroom with computer suites; intranet and external server available for use by students and staff both in school and also at home.
Awarded:	£227395,000
Start date: November 2000	End date: September 2005

CASE STUDY 8:	
Focus of project:	Built heritage
Heritage area:	Historic buildings, monuments and archaeological sites
Region/country:	Northern Ireland
Target group:	Primary schools, Key Stage 2
Informants:	Chair of Education Sub Committee, project manager, development officer, researcher, headteacher (teaching head in 135 pupil primary school and 1 teacher
Indoor space:	None, uses primary schools and built environment
Awarded:	£87,300
Start date: January 2001	End Date: June 2004

A5: Overview of case study projects

Case Study Code No.	Regions/ countries	Focus of projects	Brief description	Educational sectors	Heritage Areas	Grant awarded	Status: completed
1	Wales	Environmental Enhancement	Development of the natural heritage environmental education programme through improvements in interpretative material, employment of an environmental education officer and creation of improved access routes.	P&S	Land	85,000	No
2	South West	Museum education	Refurbishment of first floor public galleries, fitting out of education centre with lecture theatre and resource room	P & 16+	Mus	260,000	No
3	East Midlands	Heritage centre	To appoint education and media staff, and the management & development of education resources	P&S	Mus	314,000	No
4	London	Cultural heritage	To create teaching modules on specific world cultural traditions and deliver these through artistic residences schools.	P&S	Intang	409,000	No
5	North West	Natural Heritage	Work with local schools to increase access and understanding of local natural heritage.	P	Land	87,000	No
6	Yorkshire and the Humber	Heritage site	Creation of multi-cultural education and also an access programme to develop new audiences	P	IMT	89,400	No
7	Scotland	Sustainable Development	Pilot sustainable development education programme in secondary schools.	S	Land	227,395	No
8	Northern Ireland	Built heritage	Development of the educational programme based upon build heritage with particular emphasis on Key Stage 2.	P	Build	87,300	Yes

Key:
Stages: P=Primary; S=Secondary; N/S=Not Specified; 16+=Post-16

Heritage areas: 1. Build = Historic buildings, monuments and archaeological sites; 2. IMT = Industrial, maritime and transport collections and sites; 3. Intang = Intangible heritage, such as cultural traditions, oral history, language; 4. Land = Land and biodiversity including parks, designed landscapes, countryside, habitats, and priority species in the UK Biodiversity Action Plan; 5. Mus = Museums, galleries, historic library collections and archives.