The Heritage Alliance

Innovation:
Explore

How can we improve the heritage sector's access to business support information?

Executive
Summary

What did we explore?

Through our Innovation: Explore work we have delved into the heritage sector's access to business support information, looking specifically at signposting behaviour by sector support organisations and how we can help to make sharing and finding trusted information easier. We also wanted to understand whether innovative solutions to this problem require a regional lens, looking at the North East as a pilot region in which to gather views.

Who did we bring on the journey?

We consulted sector support organisations, associations and networks within the Heritage Alliance membership, colleagues from heritage organisations in the North East of England, and our own staff and trustees to better understand current behaviour, key barriers, and what features a potential solution might have.

Total participant reach: 106

What have we discovered?

A variety of methods are being used to signpost business support information across the sector

There is common ground in the issues experienced nationally and the North East

4

Four primary barriers to access

6

Six design principles that could help to shape solutions and improve future access.

We're sharing our findings so that the wider sector can benefit from what we've learnt about current behaviours, common ground issues, and potential principles that could support effective information signposting in the future.
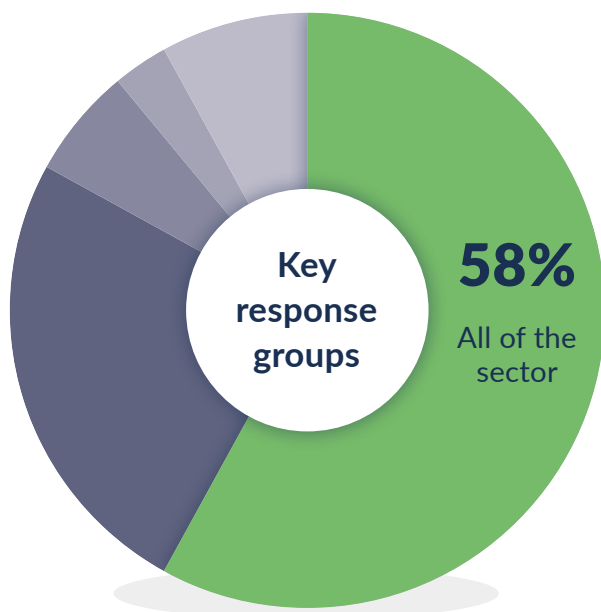
What is the
Problem?

Why is access to business support resources crucial to heritage sector resilience?

Business knowledge and non-heritage skills are important for building healthy and sustainable organisations across the heritage sector, but guidance, advice and training in these areas are not always available to organisations 'in house'. If the sector is to become more operationally resilient, access to existing information and best practice needs to be more easily accessible for organisations of all shapes and sizes.

We asked the sector who is responsible for ensuring resilience – attitudes show that the majority of respondents feel that everyone has a part to play.

Key response groups

58% All of the sector

"everyone, but we need leadership"

"we're all responsible for our own bit"

"we as a sector have to own it"

- Government **25%**
- Funders **6%**
- Professional Bodies **3%**
- Other **8%**

Why did we focus on signposting?

There is a lot of good guidance, training and toolkits tailored to the sector already out there, but organisations often lack a clear pathway to find them. Finding them and applying them is a key part of the puzzle, as identified by wider sector thinking.

Did you know?

Through our support programmes (funded by the National Lottery Heritage Fund), Rebuilding Heritage, Heritage Digital and the Digital Heritage Hub (managed by Arts Marketing Association) we produced over 140 resources tailored for the Heritage Sector.

What other sources say about the need for signposting:

DASH Report 2021:

"Recommendation for Organisations:

Signpost staff, trustees and volunteers to relevant online resources and communities that could provide them with useful information or support relating to effective use of digital, such as those supported via the Digital Skills for Heritage programme"

UK Heritage Pulse Spotlight on Partnerships:

"Limited capacity in heritage organisations is the main barrier to knowledge and resource sharing – but smaller organisations would benefit from support to make connections."

Historic Environment Forum, Heritage Sector Resilience Plan 2022-24:
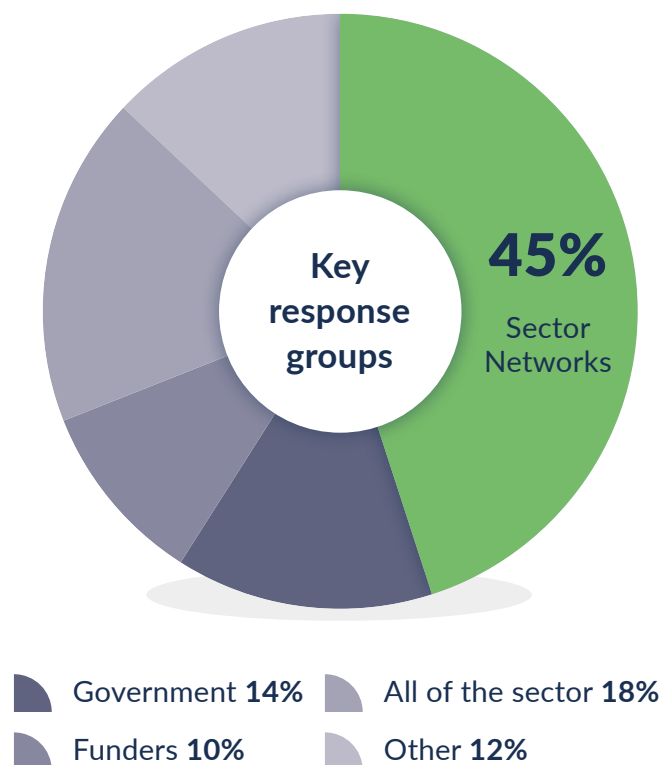
"Theme: Skills

Priority Actions for the Sector: 3. Mapping and signposting existing schemes, to develop non-heritage specific skills (digital, engagement etc). Use this map to identify gaps and horizon scan for future opportunities. [...]

Theme: Strong governance, business models and capacity

Priority actions for the Sector: 1. Improve targeting and accessibility of current support: Survey existing support, and signpost for heritage organisations. [...]

3. Demonstrate best practice: Build a collection of case studies to illustrate best practice for a variety of heritage organisations."

We asked the sector whose role it is to signpost information – attitudes show the majority of respondents feel that signposting is an activity for networks.

Key response groups

45% Sector Networks

"Umbrella groups"

"sector support orgs"

"trusted membership bodies"

Government **14%**   All of the sector **18%**

Funders **10%**   Other **12%**

Sharing Existing
Good Practice

10 useful signposting behaviours

As part of our consultation, we identified existing good practice that supports signposting of resources, tools and guidance across the sector. In Heritage, we are not new to signposting: most sector support bodies we spoke to viewed signposting as a crucial part of how they support members and networks.

1. Signposting Plus: explaining to your audience how to use the material and why it is relevant and needed.

2. Sector Events: using them to share messages, engage with external experts and growing reach.

**3. Tailoring:** repurposing materials to align with your audience's needs.

4. Clinics: providing CPD for your audience on specific topics, which will include signposting.

5. 'Someone Knows Somebody' Who Can Help: seeking advice from colleagues, drawing from a pool of existing contacts.

6. Local Business Networks: joining non-heritage networks and enterprise support systems.

7. Useful Sources: actively recommending useful social media accounts, umbrella bodies and funders to identify and signpost helpful material.
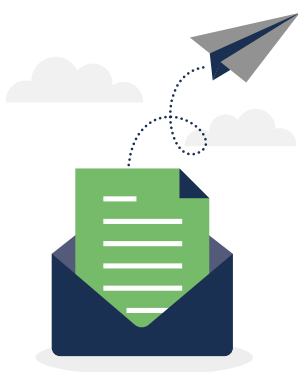
8. Newsletters: sharing good resources and information through members newsletters, blogs and individual webpages.

9. Business Support Teams: working with these teams to direct enquiries for non-heritage expertise.
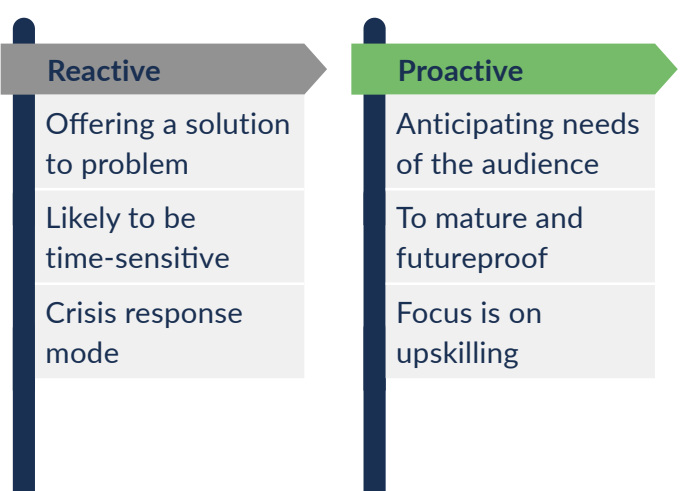
10. Ask the Expert: advising members to go to specialist sources for advice outside of an organisation's remit.

Not everyone signposts the same way

Sector Support Organisations supporting volunteer-led, micro and small organisations are more likely to support on a broad range of topics and do a lot of 'Signposting Plus'.

Accredited and Professional Bodies are more likely to advise their professional workforce to go straight to specialist sources and focus on providing advice within their own remit.

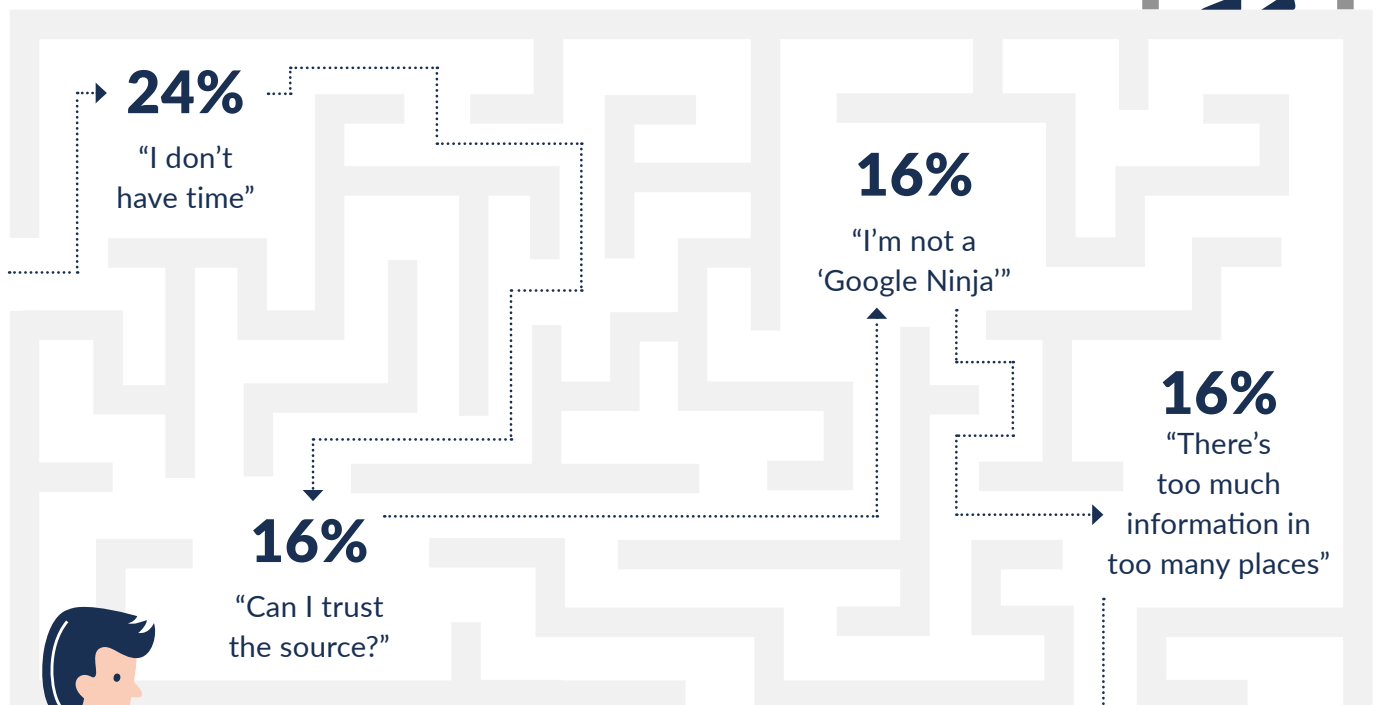## Two Different Ways to Signpost

Reactive	Proactive
Offering a solution to problem	Anticipating needs of the audience
Likely to be time-sensitive	To mature and futureproof
Crisis response mode	Focus is on upskilling

The Key
Barriers

What's getting in the way of sharing business support information?

Despite signposting and collaboration resonating as an important activity for the sector, our consultation has helped to uncover some of the key challenges our colleagues are facing when it comes to finding and sharing quality business support material.

Common views expressed through our consultation groups revealed four main barriers to accessing information:

24%
"I don't have time"

16%
"I'm not a 'Google Ninja'"

16%
"There's too much information in too many places"

16%
"Can I trust the source?"

Other interesting barriers the sector told us about:

"It doesn't feel relevant to my sub-sector"

"Great resources are promoted when they're launched, but you don't hear about them after"

"It's a not a priority unless there is a crisis"

"I don't know how to use it"

"I don't know what I need"

Key finding

There was strong overlap in the barriers experienced by both North East stakeholders and national stakeholders. The same key barriers came up frequently in both sets of responses; capacity stands out even more strongly amongst regional stakeholders, with 36% of the barriers mentioned relating to time.

Regionality and Heritage-flavoured Material

As part of our conversations with colleagues in the North East, we looked at whether a solution that improves access to business support information ought to be tailored to regional needs, and whether it is important that resources have a 'heritage-flavour'.
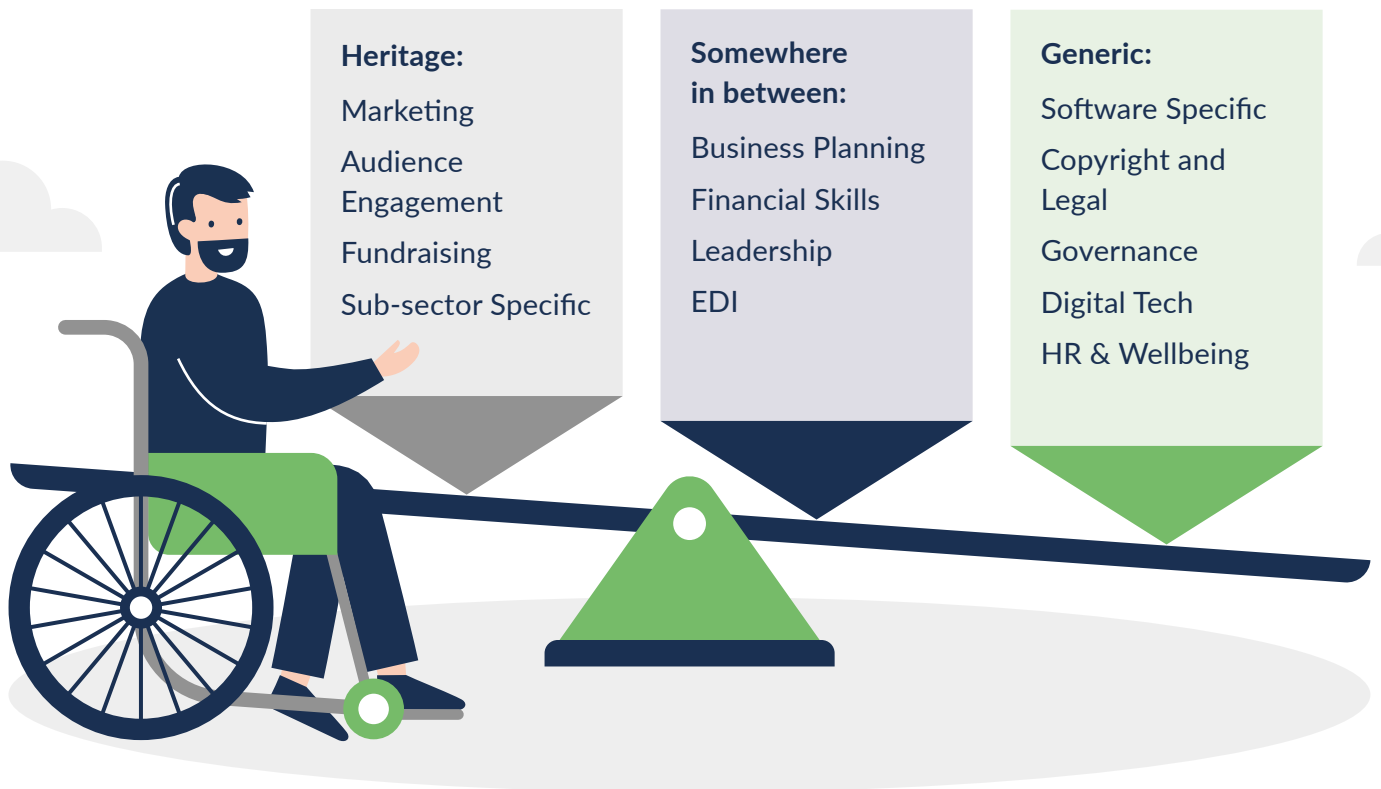
To enable access to these business support topics, is a regional approach or a national one better?

National

Copyright & Legal

Financial Skills

Specific Software

Business Planning

Training

Governance

Mixed approach

EDI

Digital Skills

Fundraising

Leadership

Stakeholder Management

Regional

HR & Wellbeing

Audience Engagement (national support to deliver locally)

Marketing

Key finding

Standard information and resources that support organisations to develop structures and processes resonate more strongly as something that could be delivered nationally. Support around people – audiences and workforce – could benefit with being rolled-out regionally to reflect the local picture.

Must something be 'Heritage-Flavoured'?

Heritage:

Marketing

Audience Engagement

Fundraising

Sub-sector Specific

Somewhere in between:

Business Planning

Financial Skills

Leadership

EDI

Generic:

Software Specific

Copyright and Legal

Governance

Digital Tech

HR & Wellbeing

Key finding

Whilst the benefit of using heritage case studies was a frequent reflection, business support resources are generally applicable across the board and do not need to be industry-specific to be useful. However, certain skills, such as understanding audiences and identifying funding streams would benefit from being targeted to the sector.

"I go to someone who knows my world"

"Case-studies from outside the sector will fall flat"

Six Design Principles
Identified by the Sector

What traits and features should a solution to this problem have?

So what features would help to make signposting – and information access more generally – easier for our colleagues? An objective of our consultation was to explore views from across the sector to learn what solution characteristics colleagues felt would be valuable.

We reviewed key barriers, preferred solution traits and stakeholder reactions to four broad prototype ideas. Six key categories have emerged that could be usefully seen as potential design principles for the sector:

1. Saves the sector time

Options that **provide efficiencies** for colleagues is an unsurprising trait, whether that be through bringing information together in one place to avoid having to signpost to multiple sources, or **reducing time spent** searching the web for quality resources.

A time saving solution might also recognise the reality that often colleagues are looking to signpost information to colleagues who **require a fast result.**

"Time saving"

"Simple for busy people"

"Curated information"

2. Reliable quality assurance

"Peer reviewed"

"Transparent and reliable"

"Recommendations based"

Some form of **mechanism for verification** and **quality assurance** appears to be an important feature for ensuring that stakeholders feel confident about sharing what's available.

Transparency around sources and allowing for appropriate **vetting of material** would also be helpful in saving time for colleagues, **doing part of the leg-work** required in terms of recommending a reliable source of support.

3. Efficient maintenance and product evolution

Related to reliability, **ensuring that information is up-to-date** and that any system of sharing information is **maintained** is a crucial feature for the sector. Solutions that haven't factored in evolution or adaptability are unlikely to support sustainable information sharing.

"Adaptable and scalable in approach"

"Replicable, re-usable options"

"Relevant and up to date"

4. Reflects sector voices and experience

The **wish to co-curate** information appeared across responses, demonstrating that a sense of **shared ownership and responsibility** would be valuable for the sector.

Responding to barriers around a **lack of 'sector-specific' materials** and that some organisations are having to take time out to 'tailor' resources for their members, ensuring that the material available **resonates with sector experiences** appears to be an important principle to include.

"Workforce curated"

"Peer-to-peer element"

"Case study approach"

5. Inclusive and accessible

"Clear language and processes"

"Affordable"

"Differentiated pathways"

Stakeholders clearly value an approach that would **ensure the breadth of the sector can access the material easily,** and that a system which **recognises the diversity of needs, experience and capacity.**
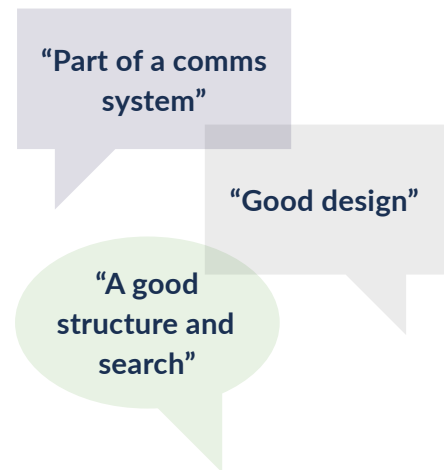
Other key findings

There is currently strong sector discomfort around AI as a mechanism for improving access to information. In our prototyping activity, 56% expressed a negative reaction to an AI driven idea, and a further 30% expressed some degree of uncertainty.

6. Strong design and promotion

A **well-designed** solution or product should also be **linked to a system of promotion or communication.** This would help to draw users, build confidence in the resource, and resolve a persistent issue of new material being 'launched' and then lost.

"Part of a comms system"

"Good design"

"A good structure and search"

Other key findings

National and Regional colleagues share similar experiences and value similar features.

Top common traits across all our consultation groups include: *Inclusive and accessible, reflects sector experience, saves the sector time.*

Summary
of activities

Who did we talk to?

Sector Support organisations within the Heritage Alliance Membership

Heritage Organisations in the North East

Heritage Alliance Staff

Heritage Alliance Trustees

How did we explore the issue?

1 Sector-wide survey
44 participants

2 Sector Events
31 participants

5 1:1 interviews

6 Focus Group sessions
34 participants

=

2 x Heritage Alliance Member Sessions

3 x North East Stakeholder Sessions

1 x Heritage Alliance Staff and Trustee Session

4 prototyping concepts, generating **288 stakeholder reactions**

A regular opportunity to speak to someone in person (but costs might be involved)

A 'Wikipedia' style page, where you and others in the sector can contribute or signpost great resources

A formal online registry of materials

An AI chatbox that you can consult to help find what you need.

106 organisations reached

The Heritage Alliance would like to thank all participating colleagues for providing their valued time and insights to help us explore this issue for the sector.

About The Heritage Alliance

The Heritage Alliance is a membership body which represents the independent heritage movement in England. Our membership of over 200 organisations represents the interests of over 7 million volunteers, trustees, members and staff.

Building on our insights into the sector's distinctive needs, the Heritage Alliance works in partnership to provide sector support programmes that inspire, lead and build the capabilities of our members and the wider sector to be more sustainable and resilient.

Our Innovation: Explore work was delivered with support from the National Lottery Heritage Fund.