# SENSE OF PLACE TOOLKIT

## Guidance for Heritage-based Rural Regeneration Projects

International Centre for the Uplands - Cumbria

University of Cumbria

LEADER+

defra
Department for Environment Food and Rural Affairs

This project was part-funded by the European Agricultural Guidance and Guarantee Fund and DEFRA through the:

- Cumbria Fells and Dales LEADER+ Programme
- North Pennines LEADER+ Programme
- North Northumberland LEADER+ Programme

This Toolkit was written by Bowles Green Limited on behalf of the English Northern Uplands Sense of Place Project.

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The Authors would like to thank the Steering Group members, the organisers, hosts and participants in three days of reciprocal visits in Cumbria, the North Pennines and Northumbria, participants in the Sense of Place Toolkit and Project Evaluation Workshop (22 January 2008, Penrith) and all ho have contributed opinions, information and material to the project.

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# 1. INTRODUCTION TO THE TOOLKIT

## ***Sense of Place*** **Toolkit**

Representatives of rural, community heritage projects have identified a need for sharing experience and good practice. In response this ***Sense of Place*** Toolkit has been produced to provide basic guidance on a number of common topics and to share the experience of practitioners.

A programme of three reciprocal visits informed the preparation of the toolkit; they were attended by representatives of community rural heritage projects and organisations which provide support to such projects.

This Toolkit provides practical advice on developing and making the most of ***Sense of Place*** projects, including:

- Planning and managing a project
- Involving people in your project
- Interpretation – communicating '***Sense of Place***' to others
- Marketing and communications
- Business planning and fundraising
- Evaluating your project

The Appendix contains some useful resources.

The 'quick reference' table below shows what you will find in each section.

The Toolkit will be developed to take account feedback from users and to include new information, approaches and experience.

It is the intention of both the International Centre for the Uplands, University of Cumbria and Newcastle University to host the toolkit and to provide downloads on request. These sites will be linked to each other and to the Bowles Green consultancy. The International Centre will lead on revisions to the text and will provide a monitored message board service such that community groups can post comments and requests for information. The International Centre will maintain contacts with potential funding sources for Community Groups and may be able to advise on appropriate opportunities.

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| Section | Sub-section | What You'll Find |
|---|---|---|
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| | Fundraising Checklist | ▪ Steps in putting together a funding bid |

## Is the Toolkit for You?

A first glance at the Toolkit might look like hard work – especially for small scale projects, but, remember that 15 minutes spent now learning from the experience of others could save days of misdirected effort in the future. Here are some tips on how to make using the Toolkit easier:

- You don't have to read the whole Toolkit from start to finish – just pick out the sections that are relevant to you
- Use the quick reference table to find relevant sections
- Check the 'what's in this section' box at the start of each section
- Spread the load, ask different members of your team to read the sections that are relevant to their work
- Start with the Key Notes for Small-scale Projects at the end of each section

Remember, the Toolkit is a resource to help you make your project happen if that's what you want to do!

## Northern Uplands *Sense of Place* Project

The Northern Uplands ***Sense of Place*** Project aims to:

- Identify if, and how, elements in the cultural landscape of upland Northern England might contribute to community sustainability and development
- Explore the meaning of '***Sense of Place***' and 'cultural identity' to participating communities
- Identify potential community based landscape, cultural and heritage features, activities and organisations which can provide the basis for future development projects and actions in the participating Leader+ areas
- Provide events, training workshops and reciprocal visits for participating communities, organisations and individuals, around themes relating to cultural landscape and project development
- Test whether the concept of '***Sense of Place***' can be used as a future development tool throughout the Leader+ network across the UK and Europe

The project is funded through the three Northern England LEADER+ programmes (Cumbria Fells & Dales, North Pennines and North Northumberland) and administered by the International Centre for the Uplands – Cumbria, which is based at the Newton Rigg Campus of the University of Cumbria.

## Heritage – What do we mean?

Heritage is a much used and often mis-understood term. It has been become the basis of an industry which develops and manages heritage centres, attractions and events and so it is often perceived in these terms. When we use the word heritage in this toolkit we mean all aspects of the natural and cultural heritage of a place. This toolkit is to help communities use their heritage to the benefit of local residents and visitors. It considers ways to use heritage as a rural development tool and looks at ways to make your heritage relevant now and in the future.

## Sense of Place

***Sense of Place*** is everything that is distinctive about a place – landform, vegetation, land use, field boundaries and other features, buildings, settlements, history, traditions, dialect, industries, skills, food and drink, etc; things that resonate with both residents and visitors. It is sometimes called 'local distinctiveness', which Common Ground defines as 'being about places and our relationship with them…as much about the commonplace as about the rare, about the everyday as much as the endangered, and about the ordinary as about the spectacular' (visit www.commonground.org.uk/distinctiveness for more details).

***Sense of Place*** is often taken forwards in Europe under the name of Eco-Museés, which use ***Sense of Place*** in a creative way as a resource for rural regeneration.

**The Eco-Musée Concept**

Eco-musée philosophy and practice have been adopted worldwide for a variety of different purposes, including and often combining more than one of, the following:

- Tourism development and promotion
- Economic regeneration in rural areas
- Conservation of natural and cultural heritage
- Fostering a sense of local pride
- Promoting local cultural identity

Eco-musées have strong ties to sustainability, the appreciation of local distinctiveness, and the conservation of cultural landscapes; most eco- musées are dedicated to in-situ conservation and interpretation of 'cultural touchstones' within a defined geographical area, with benefits for local communities (www.ecomusei.net for further details). Examples in the North of England might be the Swaledale Breed of sheep, the lead mining heritage of the North Pennines or the heritage of the 'Golden Age' of Northumbria.

Eco- musées can be defined as ***'dynamic ways in which communities preserve, interpret and manage their heritage for sustainable development, based on community agreement'*** or, more simply, ***'community-led heritage projects that aid sustainable development'.***

Whilst there are eco-musées on most continents, there are none in the UK. Research in the Northern Uplands has shown that the term eco- musée is puzzling to people, suggesting that the reason for the apparent lack of enthusiasm for eco-museums is due to language rather than the processes involved.

In England and other parts of the UK, the phrases '***Sense of Place***' and 'local distinctiveness' have been used to describe much of what constitutes an eco-musée.

**The History of Ecomusées**

The term eco-musée was coined by Hugues de Varine in 1971 and developed by him with Georges Henri Riviére. The first two eco-musées were established in France in the mid 1970s, at Le Creusot (1974) and the Grande Lande in Gascony (1975).

Since then, the concept has found popularity throughout Europe and beyond and there are now some 400 eco-musées world-wide, along with increasing awareness of the concept and a number of national eco-musée networks.

**Making the Most of *Sense of Place***

***Sense of Place*** is a combination of all of the things that give a place its unique character, this includes:

- **Natural features** – the landscape, characteristic geological features, habitats, flora and fauna
- **Man-made features** – town or village plan, streets, mixtures of activities, local architectural styles and building materials, field boundaries, street furniture
- **Heritage, culture and traditions** – history, famous people, multicultural mix, traditional events and festivals, dialect, music, the arts
- **Produce and 'industries'** – food and drink, crafts, markets and shops

Key aspects of ***Sense of Place*** are as follows:

- It is initiated and steered by local communities
- It should allow for public participation from all stakeholder groups in all decision-making processes and activities in a democratic manner
- It should stimulate joint ownership and management, with input from all stakeholder groups including local communities, academic advisers, local business, local authorities and government structures
- An emphasis is usually placed on the process of heritage management, rather than on heritage products for consumption
- It is likely to encourage collaboration with local craftspeople, artists, writers, actors and musicians
- It often depends on substantial voluntary effort by local stakeholders
- It focuses on local identity
- If often encompasses a geographical territory which can be determined by shared natural and/or cultural characteristics
- It looks at continuity and change over time rather than freezing things in time
- It often consists of a network of different sites and buildings, sometimes with a central or gateway hub
- It promotes conservation of heritage resources in situ
- Equal attention is often given to tangible and intangible heritage
- It stimulates sustainable development and sustainable use of resources
- It allows for change and development for a better future
- It encourages on-going documentation of past and present lives and people's environmental, economic, social, cultural and political interactions
- It promotes research at a number of levels, including local and academic
- It promotes a wide range of approaches to research
- It encourages a holistic approach to interpretation
- It often attempts to illustrate connections between technology and the individual, nature and man, past and present
- If provides a meeting point for heritage and responsible tourism
- It can generate benefits to local communities including sense of pride, regeneration and income

*(Gerard Corsane, International Journal of Biodiversity Science Management, September 2006)*

***Sense of Place*** can be a powerful rural regeneration tool, as it can:

- Differentiate a place or an area from others
- Provide product development opportunities
- Provide the basis of themes for products and promotion

Furthermore, there are a number of ways in which local communities can derive benefits from local distinctiveness, including:

- Creating a shared sense of local community pride and confidence
- Increasing the shared knowledge of local culture to help conserve it for future generations
- Supporting local cultural traditions and traditional skills
- Enhancing the built and/or natural environment for use and enjoyment by local residents and visitors through conservation, renovation and development projects
- Building community capacity through volunteering and training
- Bringing new life and income into the community by attracting visitors
- Creating employment by stimulating demand for local produce from visitors and tourism businesses
- Supporting local producers

***Key Notes for Sense of Place***

- ***Sense of Place*** **is the sum of physical and intangible aspects that make places unique**
- **Identifying, developing and promoting it can deliver a number of benefits for residents and visitors**
- **This Toolkit has guidance on using *Sense of Place* as a tool for rural regeneration, along with examples from the North of England**
- **If your project is small-scale, you can still benefit from using the Toolkit – start with the Key Notes for Small Scale Projects at the end of each section**

# 2 PLANNING AND MANAGING A PROJECT

***In This Section***
- **What are the stages you are likely to encounter during a project?**
- **Objectives – what they are and how to set them**
- **Managing your project as it develops**
- **Health and Safety issues and how to deal with them**
- **Making your project sustainable**

***Sense of Place*** offers a wide range of opportunities for community-run rural heritage projects. This Toolkit does not deal with ideas for projects, though some of the examples quoted might provide inspiration.

**Is This the Best Thing to Do?**

This might sound like a strange question to ask, but a 'reality check' can help make sure you are on the right track and help save time on something which is just not feasible. Ask yourself:

- What is the project hoping to achieve?
- Can it be done? (Can the project achieve its obje4ctives and is it feasible?)
- Is your current plan the best way to do it?

**Stages in Developing a Project**

Developing a project will involve a number of stages – each will bring commitments beyond having the initial idea. You should consider carefully the willingness and ability of your group to take responsibility for a project before you take a decision to develop it, bearing in mind that the tasks to be done will change, people will come and go, levels of support are likely to wax and wane and other factors affecting the project will change over time. Key stages are as follows:

- *The Idea* – having the idea in the first place involves creativity; for some, this is the easy part, for others creativity comes more slowly
- *Involving People* – to move a project forwards you will need to consult more widely to win the support of the community and key stakeholders
- *Planning* – planning to turn the idea into reality might involve specialist skills
- *Funding and Resources* – generating resources and funds can be a time-consuming business
- *Management* – managing the project will require commitment from people with a range of skills
- *Evaluation* – evaluation is important to inform management of the project and to satisfy the conditions of funders

Aspects of these six stages are explored in more detail in the remainder of this Toolkit.

**Setting Objectives**

*Introduction*

There is much confusion about exactly what objectives are and how they relate to a vision, aim and tasks or actions. The following able might help to clarify things.

| Name | Description |
|---|---|
| Vision | A description of where you plan to be in a given period of time – usually the long term. A vision is usually inspirational, aspirational, and can consist of one or two sentences or several paragraphs |
| Aim | What the project is trying to achieve overall |
| Objective | Strategic targets which, when delivered, will achieve the aim of the project |
| Task or action | Specific tasks or actions that need to be undertaken in order to achieve an objective |

The above structure could be described as a 'Performance Management Process' - a system for giving and receiving effective feedback on project delivery.

*Benefits of Objective Setting*

Setting objectives has a number of benefits, as follows:

- It sets specific targets for everyone involved in delivering the project
- It states how the performance is to be measured to assess progress
- It provides direction
- It allows progress, targets and successes to be monitored and measured by the managers of the project and by funders and other stakeholders
- It helps build working relationships and improves overall communication
- It helps to focus on specific task and reduces the potential to be sidetracked
- It can increase motivation
- It helps people working on the project to prioritise their time and other resources
- It provides a framework for monitoring and evaluation

*Smart Objectives*

All Objectives should be SMART – they should meet the following criteria:

| | | |
|---|---|---|
| **S** | **Specific** | Ensure there is no ambiguity in the objective – it has a specific outcome to be accomplished. The outcome is stated in a clearly defined manner |
| **M** | **Measurable** | Is there a form of measurement in the objective? If it cannot be measured it will be difficult to assess. |
| **A** | **Achievable** | Is it actually possible to achieve the objective given market conditions, time period, resources allocated etc? |
| **R** | **Relevant** | Does the objective meet the long-term activities of your group? |
| **T** | **Time Bound** | This means clearly stating when the objective will be achieved? |

*Steps to Keep in Mind When Writing Objectives*

You should try to think of the following when setting objectives:

| Check These Steps Have Been Taken | Implication If Not Done |
|---|---|
| Are the objectives linked to your Business or Development Plan? | The objectives will not help you to achieve your overall goals |
| Have the objectives been mutually agreed through consultation? | Some partners might not sign up to the objectives |
| Is the wording clear and concise? | The objectives will be difficult to understand & measure |
| Are they SMART objectives? | The objectives will not be effective as a means of driving and evaluating the project |
| Are your objectives prioritised? | Without this you risk inefficient use of resources and failure to concentrate on the most important aspects of your project |
| Are the objectives being used? | If not, they may de-motivate people and your project will lack progress towards its aim |
| Are they monitored regularly? | Without this you will not be able to measure progress and know how effective you are being |
| Are your objectives SIMPLE? A good reminder is KISS – Keep it Short & Simple | Can lead to lack of clarity and confusion or ambiguity |

*Things to Avoid!*

Try to avoid the following when writing objectives:

| Remember | Outcome |
|---|---|
| Don't set vague objectives | Everyone will have trouble interpreting & measuring them |
| Don't set vague or unrealistic targets | This will de-motivate people and it can be difficult to tell whether or not they have been achieved |
| Don't impose objectives | Everyone must agree to the objectives and take ownership of them |
| Don't make the process too complex or bureaucratic | Needs to be easy to use and relevant. Keep it Simple |
| Don't forget to refer back to the objectives regularly | Otherwise they are irrelevant and a waste of everyone's time and energy. People could be de-motivated at wasted effort and lack of interest in their progress |

**Management Issues**

Managing the planning and delivery of a rural community heritage project will require different skills at different stages. For example, in the first instance, there is a need for enthusiasm and persuasion to build support for the idea. Later on there will be a need for fundraising, financial management, project management and probably for interpretation, marketing and monitoring skills. In the longer term you will need to find ways of maintaining interest in the project from members of the community and stakeholders when the excitement of developing the project is gone and it is time to focus on the more mundane tasks such as maintenance.

Difficult decisions might need to be made in relation to changing the personnel on managing groups and bringing in (specialist) help from outside of the community. Whilst the latter can help with resourcing your project, it can bring other problems, for example loss of control.

As organisations from outside of the community (including external funders) become involved in your project, you might find that some will try to change your project to better meet their needs. In some cases this could benefit your project, but in others, it could mean the loss of some or all of your original objectives.

In addition to the issue of control, large projects mean a need for project management and financial management. Your organisation will need to be constituted in some way and to demonstrate good governance procedures in order to apply for and receive a grant. This might not be adequate for some of the larger funding grants and in this event, you must be prepared to work in partnership with another organisation, perhaps a local authority, which would become the 'accountable body' for the project

The Swaledale Sheep Breeders Association, a consortium of upland farmers in the Dales/ Pennines began work on several projects to promote the breed and contribute to rural regeneration following foot and mouth. A DVD and leaflet are soon to be published.

The Association also proposed a small visitor facility to interpret the breed and upland sheep farming to be located at the Auction Mart, in Kirkby Stephen, and asked Voluntary Action Cumbria to help with planning.

Funding was obtained for business planning and the funding agencies encouraged the Association to increase the size of the project to over £1 million. All of this took time, during which the project group was broadened with the addition of extra skills (business, education.etc) but at the same time, the funding priorities were changing and eventually, the funding application was turned down. This left the group with little to show for four years of work and a feeling of disillusionment with the funding agencies involvement in the project.

Worse still, space at the Auction Mart, which was being provided at no cost by the owners was, by this time, no longer available. The Association is now considering a Sense of Place-type project as a more achievable, realistic and less risky approach which can be managed by local people without the involvement of outside agencies

The project also encountered difficulties over one of its funding applications. The County Council agreed to act as the accountable body, but since the funder would only allow quarterly drawdowns and spending was on going, the fear of cash flow problems meant that this particular funding offer was not accepted.

**How Should You Organise?**

For small-scale projects, it is often best to work under the wing of an existing organisation, since the effort involved in setting up a formal organisation might well be greater than planning and delivering the project itself. Ask your local authority or Community Council for advice.

However, for larger projects, an independent organisation might be the best way forwards. There are many options from an informal partnership to a formally constituted body – a company limited by guarantee, trust, etc.

The decision will be yours, but expert advice is strongly recommended. Becoming an independently constituted body can have advantages when fundraising, for example, but the administrative commitments can be onerous.

Ask your Local Community Council for advice or contact the Directory of Social Change (an independent body which gives advice to the voluntary sector) at www.dsc.org.uk. If you are considering charitable status, take advice from the Charity Commission at www.charitycommission.gov.uk; there is a helpful page here on things to think about before setting up a new charity.

**Nenthead Mining Museum** welcomes adults and children – many in school visit parties to experience above and below ground lead mining heritage on a 200 acre site 80% of which has 'open access'. It has a legal requirement to meet mines as well as general health and safety requirements. The mine is inspected randomly at 24 hours notice by the Mines Inspectorate and once a year by a mining engineer and an electrical engineer.

Above ground there are buildings, water bodies, carriageway lines and the 'Power of Water' display, water wheels and channels viewed from elevated viewing platforms.

The North Pennines Heritage Trust, which runs the site invests heavily in health and safety. A professional risk assessment is undertaken once a year and the site has been divided into 18 zones to manage this process. The process is complicated by the range of users – leisure and education visits to the attraction, archaeologists, mine explorers and visitors to the wider site outside of opening hours. In addition, the number of staff on site has grown from 5 to 25 in 3 years, increasing the health and safety training requirement.

A risk assessment template (see appendix) has been developed – this is used as a focus for all health and safety activity – risk assessments for each activity in the 18 zones, annual up-dates and staff training.

See www.npht.com of contact the North Pennines Heritage Trust : E-mail: info@npht.com, Tel: 01434 382726, Nenthead Mines Heritage Centre, Nenthead, Alston, Cumbria, CA9 3PD

### Health & Safety

Health and safety legislation is a specialist area, which is beyond the scope of this guidance. Most local authorities have a health and safety officer, who might be able to offer advice or you could bring in a specialist consultant. Information is also available on the internet – the Health and Safety Executive's website is a good place to start (www.hse.gov.uk).

### Sustainability

Sustainability is also an important element of the ***Sense of Place*** approach. Try to make your project sustainable – environmentally, socially and financially. The accepted definition of sustainable development is 'development that meets our current needs without compromising the ability of future generations to n=meet their needs'.

*Environmental Sustainability*

Ensure your project has a light footprint – avoid negative impacts on the natural and built environment, minimise any emissions and use green technologies where possible (Nenthead Lead Mine has installed a turbine in partnership with a private business; this supplies most of the site's power and a revenue stream from electricity sold to the National Grid). Try to design sustainability in, for example by starting guided walks at bus or rail stops.

*Cultural Sustainability*

Where possible make sure your project makes a positive contribution to local culture and to the local community (see case study below)

*Financial Sustainability*

Few rural regeneration projects are entirely financially sustainable as most rely ion some element of external funding. However, since on-going, revenue funding is the most difficult to come by, try to make your project as self-sustaining as you can in the long term (for example by charging for a guidebook in order to meet the costs of reprinting)

**Rural Greens** is a Cumbria-wide project run by the Friends of the Lake District (FoLD). Partly funded by the HLF, the project helps rural communities to protect, manage and enhance their greenspaces by providing:

- Case Studies
- Legal aspects of Greenspace management
- General guide to Greenspace management
- Management for wildlife
- Training workshops, facilitation, etc

In the village of Maulds Meaburn, almost every house faces the large village green which has been the focus of a number of village activities. With changing land management (grazing) and a changing population (increase in the number of people moving into the village), resources available for managing the green were falling and the cultural significance of the green was not apparent to a growing number of residents.

FoLD worked with the community to develop a project which ells the story of the village through the village green. Essentially for the residents themselves, the project includes:

- An oral history archive
- A cross-generational project in which older residents of the village share their memories of the green with pupils in the village primary school
- A cross group project in which older residents share their memories of the green with newcomers to the village
- An archive of information/photographs, etc

Whilst the project is dependent on external funding, it is helping to reconnect this changing community with its main cultural asset; there are no high on-going maintenance costs to cover and residents are learning new skills to help deliver the project which will be available for future projects.

Contact Jo Chaffer, Outreach Officer at Friends of the Lake District
www.fld.org.uk, E-mail: info@fld.org.uk, Tel: 01539 720788, Murley Moss, Oxenholme Road, Kendal, Cumbria, LA9 7SS

***Key Notes for Managing a Project***

- **Objectives are fundamental and getting them right in the first place is very important**
- **The nature of the work will change as your project develops and you might need to bring in additional skills as you progress**
- **Bringing in external partners and funders can help with resources but can also lead to a loss of control or change of direction and will need strong management**
- **Consider who will manage your project – is there a constituted body which can take it forwards or do you need to create a new one?**
- **Consider governance issues and will you need to work in partnership with an 'accountable body' to draw down funds and cash flow issues**
- **Take advice on health and safety issues**
- **Ensure that your project is sustainable in terms of the environment, socio-cultural aspects and finance**

***Key Notes for Small Scale Projects***

*At the beginning, ask yourself:*

- *What are we hoping to achieve?*
- *Can it be done?*
- *Is this the best way to do it?*

*Set one of a small number of objectives; quantify them; be sure they are achievable.*

*Remember your skills needs will change as the project progresses; try to make sure you have access to all of the skills you need before you start.*

*Beware of losing control of your project; larger organisations might want to turn it into something you had not envisaged. If this happens, think carefully about which way you want to go.*

*Think about who will hold and manage the finance for your project. Your local authority or other existing organisations might be able to help.*

*Consider the health and safety aspects of your project. The risk assessment in the appendix to this Toolkit will help. If in doubt, seek advice!*

*Where possible try to make your project environmentally, socially and financially sustainable – avoid creating a liability for yourselves or others*

## 3. INVOLVING PEOPLE IN YOUR PROJECT

***In This Section***
- **Who will you need to liaise with to generate support for the project?**
- **Consulting your stakeholders**
- **Consulting within your community**
- **Some consultation techniques**

### The Importance of Being Inclusive

Endorsement and wide participation by all of the community is a basic principle of the ***Sense of Place*** approach and projects in rural communities are unlikely to succeed without support from the community and key stakeholders (landowners, funders, the public sector, etc).

The extent of consultation and liaison required will depend on a range of factors including the size and nature of the community involved, the scope and complexity of the project itself and the wider context for the project – for example whether or not it incorporates contentious ideas or incorporates activities which are issues for others.

If local people don't value ***Sense of Place***, it will be difficult to motivate them to conserve its qualities and to develop and promote it. It is also good interpretation practice (see Section 4) to let local people decide how they and their locality should be presented to the outside world.

In most cases it will be important also to involve others, which we will call stakeholders – businesses, landowners and organisations from the public and voluntary sectors.

You will need to consider the following:

- Consulting the community and stakeholders at the outset to understand what people think about the project
- Finding ways of letting the community decide what it wants to do
- Managing the project in a way that involves the community and sustains the support of stakeholders

### Consulting Stakeholders

Stakeholders you might want or need to involve in your project include:

- The local authorities
- LEADER+ Groups
- Protected area management organisations – National Park Authorities or Area of Outstanding Natural Beauty Management Units
- Local Community Council
- Landowners
- Special interest groups (for example history or natural history societies and organisations)
- Conservation organisations (natural and built heritage)
- Arts organisations
- User groups – walkers, cyclists, horse riders, anglers, etc
- Etc

Projects will gain greater support if they fit with or help deliver stakeholders' policies. These change frequently as organisations adapt to meet changing market, economic and other conditions. Because of the frequent changes, the strategies are not named here, but the kinds of strategies and policies that might be relevant to your project include the following:

| Scale | Strategies |
|---|---|
| Regional | ▪ Regional economic strategy<br>▪ Regional spatial strategy (replacing regional planning guidance and structure plans)<br>▪ Regional tourism strategy |
| Local Authority | ▪ Local development framework (replacing local plans)<br>▪ Economic development strategy<br>▪ Community strategy<br>▪ Cultural strategy<br>▪ Local transport plan<br>▪ Biodiversity action plan |

In addition, subject to the type of project, and where you are located, a range of other national, regional, sub-regional and local strategies and plans might be relevant

Local authorities are often very helpful across a range of areas of need. However, officers sometimes don't communicate well between departments, so you will have to find out which officers deal with the areas you need help and contact them directly.

**Why Consult the Community?**

Consulting widely within your community is an important part of building support for a project, but is often done casually or not at all because of the perceived difficulties and risks involved.

To win community support for ***Sense of Place*** projects, it is important to understand:

- The attitudes of the whole community towards its heritage
- Ways in which ***Sense of Place*** can support the community's social, economic and cultural needs
- Ways in which the negative impacts of any proposed development (for example the consequences of increased numbers of visitors) can be minimised

The advantages of a project, which has widespread support from the community, are many, including:

- Willing involvement in and support for the project and its activities
- Political support and support from organisations such as local authorities
- A warm welcome for visitors
- Eyes and ears, to identify problems and opportunities

Most communities are complex, with many interest groups, often incorporating a range of views on local issues. Because of this, effective and inclusive consultation and involvement takes time.

It is helpful to understand the different degrees of contact within communities; these are summarised in the table below. Empowering communities to shape the project, in an inclusive way – participation in the table below – is central to the concept of ***Sense of Place***.

| Level | Degree of Involvement |
|---|---|
| Information | Providing information on what is happening |
| Consultation | Asking for views on one or more options |
| Involvement | Members of the community work together and possibly with other stakeholders to formulate options and strategies |
| Participation | Facilitation techniques enable the community to formulate options and strategies |

Some useful points to remember are:

- Identifying and gaining access to representatives of different interest groups in your community can be time consuming in the first place, but will save un-necessary conflict or feelings of exclusion in the future
- On-going time commitment – involving the community creates a need for continued contact and communication to keep people informed on progress
- Managing expectations – beware of creating expectations you cannot fulfil – this will lead to de-motivation and loss of support for the project
- Accepting some loss of control – all members of the community should be given an equal say in how the project is developed; this is likely to lead to some development of or change in the idea first put forward

**What is the Community?**

A community, like all groups of individuals, can be segmented in a number of ways. Different individuals and groups will have different attitudes and needs depending on a range of factors including local circumstances, previous experience, etc.

For the purposes of community consultation there are some key groups, including:

- Elected representatives – parish district and county councillors
- Community groups – youth groups, women's groups, neighbourhood groups
- Interest groups – for example history societies, and groups of ramblers, naturalists, etc
- Businesses
- 'Non-joiners' – individuals who are not represented by groups by choice or circumstances

There are likely to be other groups that will need to be consulted, though this will depend on the nature of your community and the project in question; these might include landowners, people born in the place and those who have moved in, different age groups, people working in different industries, etc.

Although businesses are occasionally in conflict with residents, they are a key segment. Businesses are important in their own right, as they have greatest contact with visitors and it is through businesses that many of the benefits of tourism are channelled. They are also important as intermediaries for reaching local people – through their employees and their customers.

| Segment | Key Issues |
|---|---|
| Elected representatives | ▪ Opinions of constituents<br>▪ Political issues, especially the impact on public spending |
| Community groups | ▪ Local issues, such as parking, congestion, provision of services |
| Interest groups | ▪ Specific issues, such as access, conservation of a building or site |
| Business | ▪ Maximising profit<br>▪ Planning and other regulations<br>▪ Availability of workforce and wage costs |
| Individuals | ▪ Issues relating to individual circumstances, such as employment opportunities, crowds and congestion |

**The Consultation Process**

*Surveying Community Attitudes*

The techniques used will be governed by the nature of the community at a particular place. However, a number of steps need to be taken, as follows:

1. Defining the community
2. Making the key issues relevant and interesting to motivate response/participation
3. Selecting a consultation technique
4. Implementing the consultation
5. Follow-up

*Defining the Community*

At the outset, it is important to understand your community, so that appropriate consultation techniques can be selected. For example, the structure and scale of the community and the importance of different issues will be different in a town, a village and a seaside resort.

Some segments of your community are not well organised or represented (for example retired people, women and disadvantaged groups) and some patience and creativity may be required to reach these groups. Others will be well organised and even forceful and you will have to find ways of managing the views of both.

Interest groups are sometimes made up of at least a proportion of people who live outside of the community in question, but who play an influential role within it, for example ramblers or conservation volunteers who might work hard to open and maintain access in an area, but who live elsewhere. They should not be overlooked.

In many rural areas, visitors themselves become a significant part of the community. Some buy second homes or static caravans and many will make repeated day or staying visits to the same destination, developing friendships with local people and introducing their children to the destination; they often also have strong views on aspects of ***Sense of Place***. People visiting friends and relatives are a significant proportion of all visitors and they can also have a special affinity with the place, which needs to be taken into account.

*Making the Key Issues Relevant and Interesting to Motivate Response/Participation*

If ***Sense of Place*** is difficult to explain to rural regeneration professionals, then the task of explaining the concept to the wider community represents a challenge. Relating your idea to one or more specific, local issues to capture people's interest and stimulate their involvement can be an effective approach.

In most places, there are issues that will concern at least a proportion of the community and several can be included in a consultation, to give something to all interest groups.

Where less is known about the attitudes of the community, it can be helpful to run some focus groups with a representative sample of the community to identify issues for survey.

Focus groups are structured discussions on a pre-determined range of topics with 8-12 people. This technique is commonly used by market research companies to identify issues for interview surveys. Participants are recruited to a specification and the discussion (usually recorded – audio and/or video) is conducted by one or more facilitators, following a topic guide. The discussion is subsequently analysed to generate findings.

A study to identify people's needs and preferences in relation to countryside recreation in the Lake District National Park found that focus groups yielded considerably more useful information than an interview survey, at considerably less cost.

*Selecting a Consultation Technique*

A range of techniques is available, but the underlying principle is that to get the best results, you need to go out and engage with people on their own ground. This could include:

| Segment | Key Issues |
|---|---|
| Elected representatives | ▪ Interviews/consultations |
| Community groups | ▪ Interviews/consultations with community leaders<br>▪ Attending group meetings |
| Interest groups | ▪ Interviews/consultations with representatives<br>▪ Attending group meetings |
| Business | ▪ Interviews/consultations with trade organisations<br>▪ Interview survey<br>▪ Postal survey |
| Individuals | ▪ Exhibitions (& associated consultation)<br>▪ Public meetings<br>▪ Public drop-in sessions<br>▪ Interview surveys<br>▪ Postal surveys |

Factors to consider when selecting your consultation process are:

- Size of the community – how many people are there? What are the different interest groups in relation to your project? How many people do you need to consult to get a representative view?
- Structure of the community – what are the 'hard to reach' groups? How do you ensure that all have the opportunity to be heard?

- Scale of consultation – how do you ensure that everyone can feel they have had an opportunity to make their views heard?
- What is your budget for consultation – how much time and finance do you have and what can you achieve with your resources?

> *Consultation on development and management options with the community and users at Talkin Tarn Country Park by Cumbria County Council consisted of a week-long exhibition in the visitor centre. In addition to a self complete survey form/comments sheet, an individual was on hand to answer questions and discuss people's response. The consultation was publicised in the local press, on radio and TV and on posters on-site*

*Implementing the Consultation*

Key questions to ask are:

- What are the key questions or issues to resolve? – what are you trying to achieve?
- Have all segments of the community had an opportunity to contribute?
- Which groups have not responded and why? – How can you engage them?

If you plan to run a questionnaire survey, it can be helpful to 'pilot' he questionnaire with a small number of people first to iron out any problems

| Technique | Points to Consider |
|---|---|
| Questionnaire survey | ▪ Will you survey everyone or obtain a representative sample?<br>▪ Can you use existing distribution mechanisms, such as the parish magazine?<br>▪ Can you 'piggy-back' on an existing survey?<br>▪ Can you make use of students, possibly as part of their existing course work? |
| Focus groups | ▪ Focus group discussions with representatives of each group can be more cost-effective than an extensive interview survey |
| Attending the meetings of councils, groups and organisations | ▪ The timescale becomes driven by meeting cycles<br>▪ An effective way to reach elected members and 'movers and shakers' |
| Public meetings | ▪ Can be risky – easily hijacked or disrupted by forceful individuals<br>▪ The views of less confident people are under-represented<br>▪ Can be useful to allow people to 'let off steam' at the beginning of a consultation process |
| Exhibitions | ▪ Good way to convey complicated ideas<br>▪ Need to choose effective venues – places where people go already |
| Drop-in session | ▪ Representatives of the project staff an exhibition at a public place over a period of time which gives people every opportunity to participate |

Publicity is important to raise awareness of a consultation – work with the local media and with local organisations to maximise awareness. In some cases the local media might become involved. An example is consultation on development ideas for Pannett Park in Whitby; the local newspaper distributed a questionnaire in one issue and newspaper distributors collected and returned completed questionnaires to the friends group.

*Analysis*

Analysis can be time-consuming and you should ensure that you have resources for this before you start collecting information. You can often get help with analysis of questionnaire surveys from your local authority or from a college – they usually have a copy of SPSS or SNAP, the two proprietary analysis software programmes – and in some cases can help with analysis. For example, in the Panett Park example noted above, Scarborough Borough Council input the data directly onto the Council system and then helped with the analysis.

*Follow-up*

Once the information has been collected and analysed, it is important to communicate the results back to those who provided it. It is equally important to continue to communicate what is to be done and what is being achieved.

**Critical Success/Failure Factors**

The likelihood of success can be increased and of failure minimised if the following critical factors are addressed:

- Be inclusive – make sure to contact all segments of the community and all relevant stakeholders
- Be prepared to act on the response – raising hopes and failing to deliver is asking for trouble
- Be prepared for surprises – the response might not be what you were expecting and you must be prepared to incorporate community needs into your plans
- Deal with the responses honestly – always be clear about what you can and can't do; unrealistic promises will lead to disillusionment and loss of support
- Communicate the results of your survey and continue to communicate successes down the line

The Golden Age of Northumbria is a project in development which aims to celebrate the time when the Kingdom of Northumbria was a major centre of European art, learning and religion, as well as the most powerful kingdom in England – from the early 7th century to the early 9th century.

The initial idea was put forward at a seminar held by Berwick Borough Local Strategic Partnership. A series of public meetings (involving 61 community groups) and a questionnaire managed by Berwick Local History Society brought together a wide range of project ideas from community groups, schools, church groups, etc into a 2-year programme of events, open days and activities based around the feast days of the Northumbrian Saints and organised into four themes based on key figures from the period – Cuthbert, Bede, St Oswald and St Aiden.

The Society then co-ordinated a bid for Heritage Lottery Funding of £49,600 to cover the cost of organising and promoting the events programme, with all of the matching funding provided by way of volunteer time.

The aims of the programme are:

- To stimulate local pride, understanding and knowledge of the area's unique Anglo Saxon and early Christian heritage
- To involve local communities through active participation in celebrating and interpreting project themes
- To facilitate wider access to material and sites associated with the Golden Age of Northumbria
- To provide sustainable tourism through celebrating the Anglo-Saxon heritage of the area

More information: Derek Sharman, E-mail: timetoexplore@btinternet.com, Tel: 01289-330218

***Key Notes for Involving People in the Project***

- **It is necessary to involve the community and stakeholders to win support for your project**
- **Working with external organisations can bring pressure to change the nature of the project**
- **Empowering the community to shape the project is fundamental in Sense of Place projects**
- **There are different degrees of engaging your community, but only participation will involve them fully in the process**
- **There are different ways to consult with and engage your community and different groups might need handling differently**
- **Make sure everyone has the opportunity to contribute and find ways to contact poorly organised or represented groups**
- **Be prepared to adapt your project ideas to reflect the views of your community**
- **Communicate the results of any surveys or consultation back to your community and keep them informed of subsequent activity**

***Key Notes for Small Scale Projects***

*Your project is more likely to be a success if has wide support from the community and stakeholders*

*Make a list of the organisations you will need to contact to gain support for and help in delivering your project.*

*Show stakeholders how your project fits with their policies and helps to deliver their objectives.*

*Work out how to involve other members of your community in all aspects of the project. Try to involve them rather than just telling them what you are doing.*

*Find ways to sustain community and stakeholder interest and support through the life of the project. Communicate progress and successes as the project develops.*

*Think about the different groups within your community, for example elected members, businesses, community groups, 'non-joiners', and devise methods to reach them.*

*Make sure you act on responses. Be prepared for surprises and always respond honestly.*

## 4. INTERPRETATION - COMMUNICATING *SENSE OF PLACE* TO OTHERS

***In this Section:***

- **How to communicate *Sense of Place* through 'interpretation techniques'**
- **What is interpretation?**
- **What techniques are available and what are the advantages and disadvantages of each?**
- **How to decide which technique(s) to use**
- **Examples of creative interpretation in the Northern uplands**
- **Where to find out more**

### Interpretation

All ***Sense of Place*** projects will need to use interpretation techniques to convey the significance of place to their audiences. This section explains the concept of interpretation and gives an introduction to some of the interpretation methods you could use.

### What is Interpretation?

Interpretation is 'the art of helping people explore and appreciate our world'. It is a communication technique that helps your audiences to get the most out of the natural and cultural heritage resource. It is a proven way of presenting heritage so that people:

- Are attracted to it
- Can understand it
- Are told a story
- Can relate it to something in their lives
- Learn something they didn't know before
- Grow in their appreciation of whatever the story is about

If you think about a time when you have really enjoyed a guided or self-guided tour of a particular place, for example, it's probably because it did some of these things. Interpretation makes learning fun and enjoyable – so much so that it doesn't really feel like learning!

*Examples of Types of Interpretation*

There are two main types of interpretation:

<u>Personal Interpretation</u>

This is when people deliver the messages. It includes guided tours and numerous kinds of events such as craft sessions, story telling, live music, theatre, etc. Because people relate best to other people, personal interpretation is usually the most successful at telling a story. Personal interpretation takes lots of on-going (revenue cost) resources including time, money and training. However, on the plus side, it is a flexible approach that can change to meet changing circumstances, and it can result in increased community capacity (as local people learn the techniques) and employment opportunities.

Non-personal Interpretation

This is where ‘objects’ deliver your messages, for example publications, graphic panels, public art and audio tours. It is usually more expensive to set up (capital cost) intensive but has a lower on-going cost – usually some maintenance and eventual replacement. Overall it is usually cheaper to use, non-personal interpretation though it tends not to engage the audience so well and once produced, usually stays the same for quite a while.
The most suitable kind of interpretation for your project will depend on things like the resources you have available, the nature of your story and the places you choose to tell it. To help you choose what is best for you, Table 1 illustrates the advantages and disadvantages of the most common Interpretation methods.

**Which Method is Right for Your Project?**

To get it right, you need to do a little common-sense planning: the why, who, when, where, what and how of interpretation.

1. Think ***Why*** You Want to Tell a Particular Story

Your reasons might include some or all of the following; enhancing the visitors' experience, attracting more visitors, getting visitors to stay for longer, getting visitors to behave in a particular way or travel in a particular direction, having something else to be proud of in your area or to raise funds.

2. Think ***Who*** You Want to Aim Your Message At

Is it a story your intended audience is interested in? It's all very well you wanting to tell a story, but if nobody is interested in it, all your work will be wasted.

You also need to know quite a bit about your current or potential audience so you can ensure what you offer is relevant to them:

- Why do they come (or why do they go to similar places)? Finding this out could help you to identify relevant stories
- How old are they? Knowing this will help you use suitable levels of information and appropriate examples and comparisons
- Do they travel singly, in peer or family groups? This will tell you whether you need a product to be enjoyed by individuals or an interactive group
- Where are they from? This will indicate how you can reach them once your product is up and running
- What interests them and what do they like? You can use this information to design something you know they will like or catch their attention with something they are interested in and use it to introduce what you want to get across
- How long do they stay? If everyone is already staying a week, you might not have much chance of getting them to stay longer
- How often do they come? If they come regularly, you might want to change your interpretation periodically so people have a reason to keep coming back
- Have they any particular constraints such as mobility-impairments or language needs, which you could try to accommodate? This might give you an edge over your competitors

The Disability Discrimination Act (DDA) 1995 makes it a legal requirement for ‘service providers’ to make reasonable adjustments to provide physical and intellectual access to services for people with disabilities. To ensure that you do not inadvertently break the law, you should ensure that any interpretation is accessible by keeping it clear and multi-sensory. The best way to do this is to involve disabled people in its production. Most local authorities have an officer dealing with disabled access and usually they can offer guidance.

You also need to think *who* else needs to be involved in helping to produce any interpretation, not least because involvement encourages ownership.

### ***What*** **Stories Do You Want to Tell?**

It can be hard to agree or finalise this, but it may help if you try to complete the following sentence:

'The one thing we want users to learn about our project is…'

Once you've done this, you're starting to develop your main **theme.** A theme is a statement, usually in one or two complete sentences, which summarises the story you want tell. As an example, the following theme was used for exhibits in Keswick's Moot Hall Information Centre;

'Keswick developed where and how it did because of the outstanding natural resources in the surrounding land'.

Using this main theme to hold everything together, the exhibits then explored different aspects of the theme such as mining, tourism and farming (these lower level ideas are known as 'topics'). Outside of large interpretive centres or unless you have a large area with several sites it is best to stick to just one theme.

It can be easier to list all of your topics and develop the overall theme from there

Once you know your why, who and what of interpretation, you can set project **objectives** against which you can later measure your success. These objectives usually define what you want the user to learn, feel and do. Examples from the Moot Hall included that after using the exhibits:

- The majority of users would know that Keswick's development was tied to the resources in the surrounding land (**Learn**)
- The majority of users would **feel** that the area was a special one worthy of protection
- The majority of users would go out to see the surrounding countryside (**Do**).

### ***When*** **Will You Tell The Story?**

This question is especially important at sensitive sites. You might want to tell the story of a Natterjack toad's life cycle but not want to focus on the spawn, which could be stolen. In that case, you might decide that instead of putting up a panel, which could draw attention to the spawn, you will organise a toad watch during mating 'season' when the toads' noisy calls are wonderful to hear.

Another simpler example is that you might choose to organise a bird 'watch' at dawn - just because the birds are so audible then.

### ***Where*** **Will You Tell The Story?**

This might seem obvious, but you need to think about where the best place is to explain your story. As an example, if it's about your village as a mining community, it might not be safe to direct people to mine remains. Equally so, it's not fair to tell people about something of interest which people can't go and see.

### ***How*** **Will You Tell The Story?**

You now have almost enough information to decide which method is best for what you want to do. To help you make the final decision, you need to know what resources you're likely to have available to develop and maintain or manage the interpretation.

Advantages and Disadvantages of Common Interpretation Methods

| Method | Advantages | Disadvantages |
|---|---|---|
| Guided tours | ▪ First-hand delivery<br>▪ Flexible<br>▪ High quality and effective if with skilled/trained guides<br>▪ Can present a complex story<br>▪ Can generate revenue if charged for<br>▪ Because held at certain times, can minimise damage to a sensitive resource | ▪ Administration needed to manage attendance<br>▪ Need significant marketing<br>▪ Only reach a fairly small audience<br>▪ Relatively high cost per participant<br>▪ Significant health and safety planning required<br>▪ Messages only delivered during event itself |
| Small scale events such as nature-art workshops | ▪ Hands-on so more memorable<br>▪ High fun factor<br>▪ Attractive to family groups<br>▪ Flexible<br>▪ Because held at certain times, can minimise damage to a sensitive resource | ▪ Administration needed to manage attendance<br>▪ Need significant marketing<br>▪ Only reach a fairly small audience<br>▪ Relatively high cost per participant<br>▪ Significant health and safety planning required<br>▪ Messages only delivered during event itself |
| Theatre presentations | ▪ High entertainment value<br>▪ Can present a complex story<br>▪ Can generate revenue if charged for<br>▪ Because held at certain times, can minimise damage to a sensitive resource | ▪ Administration to manage numbers<br>▪ Need significant marketing<br>▪ Significant health and safety planning required<br>▪ Can be expensive<br>▪ Messages only delivered during event itself |
| Graphic panels | ▪ Year-round and on-site delivery of message<br>▪ Can reach large and specific audience<br>▪ Can help orientate visitors<br>▪ Need no supervision<br>▪ Can easily combine text and pictures<br>▪ Can be used to indicate ownership/management | ▪ Urban clutter – inappropriate in some locations?<br>▪ Maintenance tends to be neglected<br>▪ Static and inflexible unless designed to accept changes<br>▪ Sometimes prone to vandalism<br>▪ Hard for users to remember any orientation information once away from the panel<br>▪ Can only really communicate one main thing/theme |

| Method | Advantages | Disadvantages |
|---|---|---|
| Publications | ▪ Portable presentation of routes can aid orientation as well as appreciation and understanding<br>▪ Can generate revenue if sold<br>▪ If sold via rural services can help generate additional business<br>▪ Can contain more detail than a panel & can easily combine text and pictures<br>▪ Can be produced in several languages<br>▪ Can be retained as a souvenir<br>▪ Can be re-used or recycled | ▪ Hard to deliver on un-staffed countryside sites<br>▪ Administration required for sales, distribution, updates and reprints<br>▪ Can be discarded as litter<br>▪ Tendency to print too many |
| Audio tours | ▪ Important for visually-impaired visitors<br>▪ Can create characters for users to relate to and learn from<br>▪ Narrative style suits story-telling<br>▪ Can be multi-lingual<br>▪ User can select sequence and timing with digital versions | ▪ Relatively expensive to rent or buy<br>▪ Administration required to loan hand/head sets<br>▪ Older tape versions have pre-set sequence<br>▪ Isolate users |
| Computer 'inter-actives' | ▪ Potential to meet modern visitor expectations<br>▪ Can deliver different levels of information for a range of users<br>▪ Can offer interactivity in small space<br>▪ Can include sound, text, still and moving images | ▪ Break down a lot! Need specialist technical support.<br>▪ Expensive to produce and run<br>▪ Hard to meet high performance expectations of the computer game generation<br>▪ Hardware soon becomes obsolete |

**Making it Happen**

It is good practice, and fitting with ***Sense of Place*** thinking to allow local people to decide what stories they want to tell and to be involved in the how, who where and when of interpretation. The guidance contained in 'Involving people in your project' above will help you to do this.

Interpretation is a specialist area and you might like to bring in specialist help. Some organisations have interpretation officers – National parks, AONB Units, the agencies, conservation organisations, etc. and they may be willing to provide some guidance. Alternatively, a list of services and suppliers, including specialist consultants, along with useful articles and links, can be found via the Association of Heritage Interpretation (www.heritageinterpretation.org.uk).

## Case Studies

### Kirkby Stephen Poetry Path

The poetry path was developed by the East Cumbria Countryside Project (ECCP) working with farmers near Kirkby Stephen. Its aim was to re-iterate the role of farmers as custodians of the landscape following foot and mouth disease. A creative alternative to graphic panels (which can be intrusive in a rural setting) the poetry path links 12 poems carved into stone features which have been carefully located in the landscape. The poems, one for each month of the year, written by local poet Meg Peacocke evoke the life of a fellside farmer – hay-making, harvest, hedge-laying, lambing, etc. The stone features and calligraphy were chosen and carved by sculptress/typographer Pip Hall and consist of stand-alone features or incorporated into walls, bridges and even a waterfall.

Whilst public art can be contentious, the Kirkby Stephen Poetry Path is valued by local residents and visitors; it has successfully interpreted the upland farming year in an enjoyable and sympathetic manner. It is one of several similar projects in the Eden Valley developed by ECCP, including 'Eden Benchmarks' (10 carved stone sculptures which also serve as benches beside footpaths) and Andy Goldsworthy's 'sheepfolds' (a series of environmentally responsive sculptures at former sheepfold, pinfolds and washfolds).

A booklet describing the Poetry Path is available from Kirkby Stephen Tourist Information Centre.

See www.visitcumbria.com/pen/poetrypath.htm or http://www.edenarts.co.uk/publicart.htm, or contact the East Cumbria Countryside Project on 01228 561601

### Alston Oral History Archive

The Alston Oral History Archive has been developed by Alston resident Simon Danby. Simon began collecting old photographs from around Alston Moor since 1988, initially inviting people to bring them along to his photography shop

Some years later, he began recording people's recollections and experiences, at first on tape, then mini-disk and now using digital recordings. Digital technology (as a means of recording and storing images and sound) enabled Simon to create a searchable database combining the two which has grown into a rich collection of ***Sense of Place*** for the area.

A number of organisations in the North of England have developed similar archives, including Durham, Northumberland and Tyne & Wear museum services, Beamish Museum and the North West Sound Archive in Clitheroe, but the Alston archive demonstrates that this is possible on a local scale with relatively limited resources.

Developing the Alston archive has raised a number of questions and issues which anyone considering this approach must consider:

- Who is the archive for?
- Who owns the archive? The interviewee has copyright of the words (this can be waives or passed on by agreement) but the recordist has copyright of the recording
- How broad and how detailed do you want the archive to be? For example you could limit all interviews to five minutes, or you could interview the same person several times
- How will you select people to interview?
- Think about where the programme will end before you start
- Be sure to tell people what you will do with their words
- Be prepared for interviews – use notes to ensure you don't dry up mid-interview
- Be careful to avoid slander and take care with locally contentious issues

The equipment needed is not expensive; a digital recorder costs less than £300 and there is a range of free and low cost software (for example 'i-tunes', which is free and 'Photo to Movie' which costs $39. Guidance on procedures and the law is available from the British Museum.

An oral archive, with or without linked images, is a great way to understand how history impacts on the lives of 'ordinary' people, how different members of the community see events and deal with life in the Northern uplands.

Further information from: Simon Danby, E-mail: simondanby@zoom.co.uk, Tel: 01434 382626

***Key Notes for Interpretation***

- **Interpretation helps your audiences to get the most out of the natural and cultural heritage resource**
- **There are many methods of interpretation and you need to identify the best one for your circumstances**
- **Personal interpretation – delivered by people is the most effective, but it only reaches a small number of people and takes lots of on-going resources**
- **Impersonal interpretation, delivered by objects cost more to begin with, but it reaches more people and is usually less expensive to maintain**
- **You can do this by considering the following:**
    - **What resources do you have available in the short and longer term?**
    - **What stories do you want to tell?**
    - **Who do you want to tell them to?**
    - **When and where do you want to tell your story?**

***Key Notes for Small Scale Projects***

*Interpretation is a communication method that helps audiences get the most out of natural and cultural heritage resources.*

*There are many different types of interpretation (guided and self guided trails, panels, leaflets, audio guides, events, sculpture, etc) so it is important that you plan carefully to ensure you have selected the best method(s) for your project.*

*To plan your interpretation you should answer the following questions:*

- *Why do you want to tell a story*
- *Who do you want to tell it to?*
- *What story will you tell?*
- *When will you tell it?*
- *Where will you tell it?*
- *How will you tell it?*
- *What resources do you have (people, finance, spaces, etc) available for development and to cover on-going costs (such as maintenance or re-printing)?*

*Don't be afraid to call in expert help – interpretation is a complicated business and a little guidance at an early stage can be very worthwhile in the long term*

# 5 COMMUNICATIONS

**In this section:**
- **Why do you need to communicate**
- **Setting communications objectives**
- **Elements of the communications process**
- **Making it happen**
- **Monitoring your effectiveness**

## Introduction

All projects need to engage in some form of communications at different stages of planning and delivery, for example:

- To promote the idea within your community
- To promote the project to stakeholders and funders
- To promote the project to visitors to the area

As with management of the project, communications needs will be different in different stages, as summarised below:

| Project Stage | Target Audiences | Objectives |
|---|---|---|
| Developing the idea | Local community | ▪ Involving the community in developing the project idea |
| Involving people in the project | Local community | ▪ Assembling a team to manage the project |
| | Stakeholders | ▪ Securing landowner support<br>▪ Creating awareness of the project amongst key stakeholders<br>▪ Identifying sources of help |
| Planning | Local community<br>Stakeholders | ▪ Information on development of the project |
| Funding and resources | Potential funders | ▪ Creating awareness of the project<br>▪ Creating a positive image for the project amongst potential funders<br>▪ Paving the way for funding applications |
| | Volunteers | ▪ Creating awareness of volunteering opportunities<br>▪ Attracting volunteers to the project |
| Evaluation | Local community<br>Stakeholders<br>Funders and potential future funders | ▪ Promoting successes and achievements<br>▪ Encouraging continued support for the project |

## Communications Objectives

When setting your communications objectives you must think clearly about what you are trying to achieve and you should consider:

- Why do you want to communicate?
- What are you trying to achieve?

- Which groups do you want to reach?
- What is the timetable for getting your messages out?
- Are your objectives realistic and achievable?
- Can you quantify and qualify your aims?
- How does communication relate to the rest of your programme?

**Planning your Communication**

Your communication is likely to be most effective if you spend a little time on research and planning.

*Research*

You may not have enough resources for primary market research, but try to understand your target audience; think of them as individuals - who exactly are they? Obtain what information you can on who they are (age, sex, geographical location, lifestyle, etc.), on what their perceptions are of your project, and on what motivates them. This will help you to devise more effective messages and help you to deliver them at a time and place when the intended audience is likely to be most receptive.

Take the time to research which publications, radio and TV programmes and other media are seen by your target audiences, and which organisations already communicate with them. Identifying and using these channels will enable you to target your messages more effectively.

*Messages*

Think carefully about the messages you wish to communicate. They will be best received if they are clear and relevant to the target audience. You should consider the appropriateness of your message for the communications medium you plan to use; for example in a television interview you will need to stick to concise 'soundbites', but in a magazine feature you can cover a series of messages in more depth. Remember to think about the perceptions of the target audience and the way in which they are likely to receive the message. Using strong images can often be more effective than lots of words.

Make sure that you communicate the benefits of what you are proposing to your audience in words and/or images, which are relevant to them. If the message includes a call to action, such as visiting or volunteering, make sure that it is easy to remember and to do!

*Target Audience*

Select your target audiences and use what you have learnt about them to work out the best way to reach them with the resources you have available. Often it will be possible to work with others to help make this happen – for example with a local newspaper for the community and with tourism businesses and the tourist information centre to reach visitors to the area. Your local authority or other stakeholders might be able to help with advice and other support – for example most local authorities have communications officers or departments and most local authorities and tourist boards compile and promote events guides.

*Delivery Method*

Clearly, different media are more or less suitable for different tasks and for reaching different audiences.  The media suitability and reach grids included in the appendix give detailed information on the suitability of different media for different messages and audiences.  For example, posters are a good way to raise awareness about specific issues in your local area, whereas the Internet is a better way to deliver more complicated information to a more geographically dispersed audience.

You can measure the likely cost effectiveness of different media by considering the number of individuals who will be exposed to the message (the reach) and the number of times each individual is exposed to the message (the frequency) of each option.  Usually this information is contained in a 'media pack' available from publishers, broadcasters, etc. along with the costs of advertising space.

More difficult to define is the quality of the exposure to the message, but as a general guide, more fleeting types of exposure (e.g. television and radio) are only suitable for simple messages whilst longer exposures (e.g. newspapers, direct mail, the Internet) are better for more complex messages.

*Resources*

It is important to consider resources (finance and time) from two angles.  Ideally you should ask 'what resources do you need in order to achieve your communications targets'?  However, this ideal is normally constrained by budgets. Remember, though, to budget for all aspects of the communications exercise including design, reprographics and printing, the cost of delivering the message (e.g. mailing, advertising, internet page, etc.).  Remember to include the cost of monitoring your work.

**Making it Happen**

Communicating in a planned way can be challenging.  It can be helpful to appoint one person or a small team to look after all aspects of communication.  This can help avoid the potential for mixed messages if journalists speak to different people in your organisation.  However, bear in mind that this person or team will need to be able to take calls, answer e-mails, etc which could arrive on a regular basis.

If no-one in your group has communications skills, it is worth seeking help – can you source some training for a willing volunteer, can another organisation help you and is there a stage at which you need to buy in some professional advice?  Bear in mind that one newspaper article containing the wrong messages can ruin many months of hard work.

**Monitoring your Effectiveness**

Monitoring is often forgotten or ignored as all available funds are used for delivery. However, it is not possible to stress the importance of monitoring too much.  By monitoring your work and reviewing the results, you will learn valuable lessons for maximising the effectiveness of your communications and for planning future initiatives.

Often it is possible to build in some simple monitoring technique for example coding a tear off return slip to monitor direct mail or advertising campaigns or simply asking those who respond how they found out about your project.

Try to consider the monitoring opportunities at all stages of planning your communications - a little effort will pay off in the long term.

***Key Lessons from Communications:***

- **Your target audiences and the messages you want to get across will change as the project progresses**
- **Different audiences will react to your messages in different ways; finding out a little about them can help you to be more effective**
- **Work out the best ways to reach each target audience – there are many communications media and all have their strengths and weaknesses – pick the best media for your project and your circumstances**
- **Frame messages that are relevant to the target audience**
- **Consider appointing a communications officer or team to handle this whole area**
- **Consider training, help form other organisations and professional help**

***Key Notes for Small Scale Projects***

*You will need to communicate with others in order to progress your project, for example to raise resources and generate support. A little planning can help increase your effectiveness.*

*Your communications needs are likely to change during the project. Think about the different audiences you need to reach at different stages in your project.*

*Set clear objectives for your communications.*

*Think carefully about the audiences you want to reach – what are the best methods, times and messages to use to catch their attention?*

*Think about appointing one person to handle all media/public enquiries. This way you'll be sure to communicate consistent messages.*

## 6 BUSINESS PLANNING AND FUNDRAISING

**In this Section:**
- **Why write a business plan?**
- **Key elements of a business plan**
- **Getting help**
- **Raising funding**
- **Making a funding bid**

***Business Planning***

**What is a Business Plan?**

Business plans have many names, but essentially a business plan is a written statement of how you propose to use the resources you have to achieve a particular outcome.

It will be based on the best information you have at the time of writing. As you move through your project and understand things better you will find it helpful to up-date your business plan.

Business plans are produced by all kinds of organisations (large and small businesses, local authorities, charities, government agencies, etc) – not just businesses as a statement of what they want to achieve and how they will do it.

**Why Write a Business Plan?**

At the start of a development project, it is important to be clear about what you plan to do, how, in what order, etc. A business plan is a common sense way to achieve this. Using your business plan to guide your work will ensure that you use your resources effectively and efficiently.

In addition, many funding organisations will insist that a well-thought-out business plan is in place before they give funds to you.

**Key Elements of a Business Plan**

First of all, your business plan should be easily understood by anyone who has an interest in the project, so avoid jargon and keep the working simple.

A good basic structure is as follows:

- *Cover page* – eye-catching and professional – create a good first impression
- *Contents page* – clearly laid out
- *Introduction* – explaining what the plan is for and how it is structured
- *Main body of the plan* – see below
- *Acknowledgements and endorsements* – thank those who helped produce the plan and include copies of any letters of support, etc
- *Appendices* – the detail which supports your plan

If your project is large scale or complex and your business plan becomes a large document, it will be helpful to produce a summary version, which will give people an understanding of your plan without the detail.

The contents of the main body of your business plan will depend on the nature and scale of your project. However, if possible, it should include all of the following:

- Project aim
- Mission statement
- Description of your project
- The context for the project
- Legal and other considerations
- Market demand
- Competing and complimentary projects
- Finance
- Management
- Communications
- Monitoring

*Project Aim*

It is important to state the aim of the project at the beginning. The rest of the business plan will show haw you plan to achieve the aim.

*Mission Statement*

A mission statement can be helpful. This is a form of words, which might be a sentence or two or it might be several paragraphs, which describes the purpose and ethos of your organisation.

Some people find producing a vision can also help – this is a description of how you see your community or area of interest in, say, ten years time.

*Description of Your Project*

Give a succinct description of the project towards the beginning of the plan. This will make sure the reader understands what you are trying to achieve and broadly how you will do it as she/he works through the rest of the plan.

*The Context for the Project*

Describe the wider context for your project. Make sure you include a summary of the strategic context – the relevant policies and plans that your project will help to deliver. It can help to produce a table demonstrating strategic fit either here or at a later stage in the plan; this would include a list of relevant policies and a note on how your project will help to deliver each one.

Identify competing and complimentary projects and explain how these will affect your project and visa versa – funders will want to know that you arte generating new outputs rather than 'displacing' them from other projects.

You should also describe issues such as landownership and management, and any issues relating to this, any wider issues which you plan to address through your project.

*Legal and Other Considerations*

Describe and legal obligations which arise from your project and how you propose to meet them. This section should cover generic responsibilities such as health and safety, the Disability Discrimination Act, wider discrimination legislation, environmental responsibilities, etc.

You should also show how you propose to meet any specific requirements that might arise from your project. Also include here any planning considerations – funders will need evidence that you have planning permission for any development you are asking them to fund.

*Market Demand*

You should describe who will be attracted to your project, providing information on your target markets (for example ‘day visitors to the North Pennines’, ‘school pupils in key stages 1 and 2 in Northumberland’ or ‘people with a special interest in history’).

Provide information on the size and profile of your target markets and any information you have on how and when they will be receptive to your offer.

Primary market research can be expensive, but if you can supply real evidence of demand for your project, this will strengthen the business plan.

**Maritime Maryport**

To inform planning of a heritage centre at Maryport Harbour, a programme of research was commissioned as follows:

- Face to face interviews with day and tourist visitors within 1 hour’s drive to test response to product development options
- Telephone interviews with teachers at schools within 1 hour’s drive to research education needs
- Telephone interviews with residential centres within 1 hour’s drive to understand their needs
- Telephone interviews with coach operators who organise trips to the area to test their response to development options and research specific needs for groups

*Competing and Complimentary Projects*

*Finance*

The financial section is especially important. It should include details of:

- The capital costs of the project and how you propose to meet them
- The revenue costs of the project and how you propose to sustain these in the longer term

You should provide a detailed cash flow in the form of a spreadsheet which shows all cost and revenue items on an annual basis for an appropriate period (ideally at least 5 and preferably 10 years. Include the spread sheet in the appendix and show a summary in the main body of the report showing sub totals (for example staff costs, running costs, marketing costs). Remember to include maintenance costs.

Show the assumptions you have made in estimating cost and revenue items, for example any costs from similar projects.

You also need to include sensitivity tests – you can use your spreadsheet to calculate these. Sensitivity tests measure the impacts of the 'what-if's'. You need to show the funders that you have considered these and understand the impacts and what to do about them. For example the impacts of '10%, 20% or 30% fewer visitors than you projected because of weather, rising fuel costs, outbreak of terrorism, etc', or 'a 10% lower level of spending by visitors because of a slow down in the economy', or a 25% reduction in the projected number of school groups because of changes in education policy'.

Show the impacts of negative and positive impacts (higher numbers and spending levels than you projected and describe strategies for dealing with these eventualities.

*Management*

Describe how the project will be managed. An 'organagramme' showing the relationship of individuals and organisations can be helpful. To show how they relate to each other.

Describe your governance procedures being clear about decision making, spending, re4cord-keeping, etc.. A funder will want to be convinced that you are a competent organisation to manage their funds.

Also describe the key people and highlight any relevant experience, for example previous projects completed, expertise in relevant fields, etc.

*Communications*

Explain how you will promote your project, both in the planning stage and when it is up and running. You might feel that a separate communications plan is warranted, in which case provide a summary here.

Show:

- Your target markets
- Targets for each market segment (these can be quantitative – e.g. attract 50 school groups per year and qualitative – e.g. 50% of visitors to Maryport will be aware that Fletcher Christian was born here')
- How you intend to reach your target markets
- Link back to the finance and management sections

*Monitoring*

Explain your proposals for monitoring your project so that you can evaluate it against your aim and measure your intended outputs.

Include details of any information baseline data you have obtained or collected and describe the system(s) you will put in place to measure your performance and your impacts.

**Funding and Resources**

Most projects are dependent on external resources and funding in addition to volunteer effort from within the community and finance generated directly by the project – for example in sales of guidebooks or admission to events. Whilst funding will be very important to making a project happen, it will also be important to get whatever help you need to guide implementing the project – this could be:

- Planning advice
- Technical advice on design, construction, interpretation, etc
- Support with some aspect of the project – communications, project management, writing funding bids, etc
- Volunteers to work on your project

Here are some commonalities between raising funds and drawing in other kinds of help. For example you must:

- Demonstrate a need for the project
- Demonstrate support for the project
- Show that it will deliver benefits appropriate to the level of effort being put in
- Show that you are competent to manage the project and any assistance given
- Communicate the effects of the help given back to those who gave it and beyond

Fundraising requires some specialist skills and knowledge, not least an understanding of the objectives of funding organisations and positioning your project in line with local, regional and sub-regional strategies.

Capital funding is relatively easy to come by, but on-going revenue funding for projects is more difficult to find and so planning to minimise revenue costs is important.

### Getting Help

It is important that you recognise the right time to bring in professional help. As seen above, calling in external organisations too soon can influence a project before the community has decided on what it wants. However, leaving it too late can result in costly mistakes.

**Interpreting Flodden Field**

Flodden was one of the most decisive battles between Scotland and England. It influenced the relationship between the two countries for a generation and it was fought at a turning point in warfare methods. 2013 sees the 500th anniversary of the battle yet until recently; there was no interpretation for visitors.

An interpreted trail has recently been installed by a community group from the nearby village of Branxton. One of the biggest challenges they faced, as people with a lot of knowledge of the history and the site but no professional interpretation expertise, was when to call in the professionals.

A substantial amount of time was used up in writing information for visitors to be reproduced on interpretation panels located around the battlefield when, in fact, it would have been more time-efficient to have worked with an interpretive designer from the start.

Unfortunately, pressure from a funding organisation to develop a larger scale project had made the group wary of working with external organisations. On the other hand, the group appointed an understanding contractor (also locally based) who was able to gain the confidence of the group and work with them to provide well-written and designed panels.

## Raising Funds

There are a number of key points to keep in mind when fundraising:

- Fundraising is finding the right source of support, monetary or otherwise, to make your project happen
- You are selling an idea – competing with other good causes selling theirs
- Fundraising is time-consuming; plan as far in advance as possible
- Getting the money/support is only one part of the process; you also need to show funders that you have delivered and made sure they have got what they expected from the deal
- Sometimes is can take more effort than is worthwhile – consider the cost of the time you expect to spend on fundraising **before** you proceed
- Research your donors! The more direct and personal your approach the more likely you are to succeed

**Threlkeld Mining Museum** near Keswick is located in Threlkeld Quarry. The museum is privately owned and provides a visitor centre with an exhibition on local geology, mining and quarrying, a self guided trail, an artificial underground experience and a collection of cranes ad other industrial vehicles.

The museum is run on a shoestring core of four volunteers. The owner and museum have taken a conscious decision not to apply for grants and other funding because the time spent on completing application forms and the conditions which are attached to many funds are perceived to be too great a cost for the rewards.

The museum is a good example of a low budget operation providing a visitor experience that is highly regarded by its customers; however, it is totally dependent on the continuing commitment of a small number of individuals who are passionate about sharing their knowledge of the local mining industry.

*Some principles of fundraising*

The most obvious principle is that *people* give to *people* who ask on behalf of other *people* (or schemes) which *need help*. This means that fundraisers need communication skills.

Potential funders will have their own experience and views on the issues of your fundraising proposal. You must show commitment and enthusiasm to your scheme and be truthful; you cannot ‘sell’ a scheme with half-truths. You should identify the specific benefits and present them in the most graphic and pictorial way possible, to enhance your appeal. Your approach must be of a high standard.

*Sources of funding:*

There are five main sources: statutory funding, trusts and foundations, giving by companies, giving by individuals and giving by other institutions. Knowing where to start can be daunting. These are outlined here:

<u>Statutory Bodies</u>

Includes EU funds, the Rural Development Programme for England, Regional Development Agencies, the lottery funds, Local Authorities etc. Public sector funding agencies have standard procedures for applications. You must show that your project meets the specific funding criteria and supports the organisation’s policies.

Trusts and Foundations

A large number of Trusts and Foundations provide funding for a wide range of activities. Most fund only specific activities and some have geographical and other limits. Normally you can approach trustees to discuss how best to present applications. Timing is important, as some trusts only meet infrequently to consider applications.

Companies

Most large companies allocate an annual budget for charitable and community support. Some divide their budgets to enable them to support different types of projects. They also give their support in different ways such as: cash giving, sponsorship, advertising, joint promotions, staff secondments and gifts in kind.

Many companies also have sponsorship budgets, often managed by the marketing or PR department. Sponsorship requires a 'contract' as it is a partnership between both parties; contracts need not be complicated and can be as informal as an agreement of who will what, in a letter.

Giving by Individuals

You can encourage individuals to support your project in a number of ways, for example producing guides and other materials for sale, establishing a 'friends of' group, holding events, etc

Giving by Other Institutions

The relevant types are: membership bodies, local groups and churches. Membership bodies such as Rotary are already raising money for local causes and can be easily and informally approached usually by personal contact known to members of staff.

None of the above is likely to provide 100% of your funding needs and it will be necessary to 'match' funds to make up the total you need in the form of a funding package. Some organisations will accept the value of volunteer time as the equivalent of 'match funding'.

*Managing Your Fundraising*

Start by drawing up a list of everything you need to deliver your project – money, people's time, equipment, etc. Then draw up a list of possible sources. The appendix contains useful contact details for information on sources of grants and other funding, but include sources of advice, support, help in kind, volunteers, contact details for professional fundraisers, etc. identifying the benefits each potential donor/funder will get from supporting your project can help you decide where to focus your efforts.

Most donor/funding organisations are happy to discuss potential bids informally, doing so can save both parties a lot of time. Make sure you identify the right individual to talk to – if possible, speak to other organisations that have applied for the same funds.
Most public sector organisations and many grant giving charities have application forms and specific information they ask you to provide in support of your bid. In

any case, you should be as creative and positive as possible, whilst being sure you don't promise anything you can't deliver.

It might be possible to invite the donor/funder to visit your project, or you might be invited to make a presentation of your proposal. Take any such opportunities you can and plan them carefully – a dummy run with someone ho is familiar with the application process can be helpful to identify the kinds of questions you might be asked.

Make sure that you understand all of the conditions of the grant you are applying for and that you are able to fulfil them. Many organisations have conditions that you must give evidence of outputs – for example increased numbers of visitors; you can only measure this if you know how many visitors you have already.

It is important that you make your intention to apply for funding known to the funding organisation at an early stage and that you maintain regular contact until your bid is submitted and you have a decision. Thus will ensure you are aware of any policy changes that could affect your bid.

*Writing a Good Proposal*

- Highlight the following fundamental points:
    - The strengths of your project
    - The credibility of your organisation
    - The specific benefits to the potential donor/funder's' interests
    - Show how the project delivers regional, sub-regional and local policies
- Make it clear exactly what the donor/funder will be paying for
- Highlight your key selling points
    - What is unique?
    - What is special?
    - What is different?
    - Why it is necessary?
    - What will it achieve?
- Demonstrate the 'gap' if nothing were to be done
- Describe the outputs (e.g. additional number of visitors) and the outcomes (e.g. greater appreciation of the heritage leading to more support for it)
- Show cost-efficiency – for example show how much additional funding the grant will 'lever out' from other sources
- Describe any evidence that your project will become self-sustaining, or close to it, that it will continue beyond the funding period.

**The North Pennines Heritage Trust** has been awarded funding for a five year education project during which it will develop the area's lead mining heritage as an educational resource through school visits and an outreach programme.

The bid was for a reducing level of annual grant which is to be replaced by revenue generated by the process – income from visits to Nenthead Mines, delivering sessions in schools and hire/sales of educational resources.

At the time of writing, sixty per cent of funds are generated through the outreach programme and the five year project is on target to achieve its income projection of 50% of funds generated from fees and charges by 2008.

**Key Lessons from Business Planning and Fundraising:**
***Business Planning***

- **A business plan is a statement explaining your project aim and how you intend to reach it with the resources you have**
- **It is a requirement of many funders and will help demonstrate your competence**
- **It will help you to manage your project, for example by identifying things that could go wrong**
- **Your business plan should include:**
    - **Aim**
    - **Mission (or vision)**
    - **Description of your project**
    - **Context for the project, including policies, competitors, etc**
    - **Legal, planning and other considerations**
    - **Market demand**
    - **Finance, including a cash flow projection and sensitivity tests**
    - **Management**
    - **Communications**
    - **Monitoring proposals**
- **A variety of help is available to your project in addition to grants of money – but you have tom ask for it**
- **Sources of finance include statutory bodies, trusts and foundations, companies, individuals and other institutions**
- **Capital funding is easier to obtain than revenue funding**
- **Make a list of all the help you need and identify organisations who can give it to you**
- **Research the organisations so you can show how they will benefit by helping you**
- **Make contact at an early stage and find out if your project is of interest**
- **Make sure the rewards are worth the effort you will have to put in**
- **Be sure you can meet all of the funder's conditions, especially in relation to monitoring outputs**
- **Don't let the tail wag the dog – seek the funds and help you need, don't just apply because the money is there**
- **Maintain contact throughout the bidding process, make a presentation, hold a site visit**

**Make a positive, creative bid, but don't promise what you can't deliver**

***Key Notes for Small Scale Projects***

*Even if your project is a small-scale one, having a business plan will show potential funders that you are serious and professional, and it will give you a basis for planning and evaluating your project.*

*Your plan does not have to be a weighty tome, but it should include at least a brief description of the following:*

- *Your aim*
- *A summary description of your project*
- *The context for your project (demand, legal and other statutory considerations, competing and complimentary projects)*
- *A cash flow forecast for capital and revenue funding*
- *How you propose to manage the project and the experience of key people*
- *An assessment of the risks – the 'what ifs'*
- *Your targets ad how you will show you have met them*

*Similarly, even small projects will benefit from a thought-out approach to raising funds and other resources.*

*Remember there are lots of sources of funding and most come with some strings attached – i.e. you will need to show how you will meet the aims of the funder. In some cases much evidence is required and collecting it can be an onerous task – be sure you can meet the funders requirements before you apply. You may also need to funders' requirements to retain documents for audit purposes, sometimes for several years.*

*To write a good proposal, you need to:*

- *Highlight the strengths of your project*
- *Demonstrate the credibility of your organisation*
- *Show how your project meets the funder's particular needs/objectives*
- *Highlight your 'unique selling points' – what is unique? What is special? What is different? What is necessary?*
- *Describe the outputs and the consequences of 'doing nothing'*
- *Describe how your project will be sustainable after the funding runs out*

# 7 EVALUATING YOUR PROJECT

***In This Section***

- **What is evaluation**
- **Common problems with evaluation**
- **Considerations when planning your evaluation**

It is helpful, at the outset, to establish what is meant by some key terms: 'monitoring' and 'evaluation', and the difference between 'outputs' and 'outcomes':

- *Monitoring* – measuring the impacts of your project activities (for example recording the number of people attend your events, or the number of people buying a guidebook for a self guided trail)
- *Evaluation* – Measuring your performance against your aim, objectives and targets (by using the monitoring information you collect)
- *Outputs* – the results of your project (for example the number of peoples taking part in health walks)
- *Outcomes* – are downstream consequences of the outputs (for example lower health service costs as a result of increasing the number of people taking regular exercise)

Clearly it is easier to evaluate your outputs than your outcomes. In evaluation, the 80-20 rule applies; that is, 20% of the effort generates 80% of what you need to know. Many organisations collect data through evaluation schemes that they will never use – again the keep it short and simple maxim is useful.

*Some Problems with Evaluation*

- No budget is allocated to evaluation during project planning, which means it cannot be done properly
- No baseline data have been collected so there is nothing to compare the monitoring results against
- Too much information is collected
- The information collected is not used
- Monitoring and evaluation are seen as burdens imposed by funders
- Evaluation is done as an after thought or half-heartedly
- Seeing evaluation as an assessment of success or failure

*The Evaluation Process*

The most important thing about evaluation is to decide why you are going to do it – be clear about what you want to learn about your programme.

Most funders will require evaluation to demonstrate that project outputs are achieved and many will dictate the level or type of monitoring required. Clearly you need to take account of the requirements of funders, but it is equally, if not more important that you decide what you need to know in order to make management decisions about your project – evaluation will provide you with this.

Useful types of evaluation include:

- The impact of your project on what people do (for example, more people visiting a place, visitors spending more money in a place, etc)
- The efficiency of your project results achieved for £s spent
- Verifying that your project is doing what you set out to do

In addition, it can:

- Encourage you to focus on what your project is about
- Provide information about your project that you can use to promote is to others – the community, potential future funders, etc
- Enable you to compare your performance against that for similar projects
- Provide information that will be useful to people planning or running similar projects elsewhere

In reality, what you evaluate will depend on a combination of what you want to monitor and what resources are available, but it is usually the case that the clearer you are about what you want to evaluate, the less it will cost in terms of money and time.

*Planning Evaluation*

You should consider the following:

- What do you want to be able to do once you have evaluated your project?
- What is the audience for the evaluation?
- What kinds of information are needed to make the decisions you want to make?
- What sources can you get this information from?
- How can you collect the information (cost-effectively)?
- When is the information needed?
- What resources are available for evaluation?

Most projects need to evaluate one or more of the following:

- Achievement of aim/objectives
- Effectiveness/efficiency of your processes
- Outputs and outcomes

The following table provides some guidance on research methods you might use.

| Method | Purpose | Advantages | Challenges |
|---|---|---|---|
| Self-complete questionnaire survey | To quickly and/or easily get lots of information from people in a non threatening way | ▪ People can complete anonymously<br>▪ Inexpensive<br>▪ Easy to compare and analyse<br>▪ Good for quantitative data<br>▪ Can copy questions from other surveys | ▪ Might not get considered responses<br>▪ Wording of questions can bias responses<br>▪ They are impersonal<br>▪ The sample is self-selecting and might not be representative |
| Interview survey | To fully understand someone's impressions or experiences, or learn more about their answers to questionnaires | ▪ Can collect quantitative and qualitative data<br>▪ Interviewer can prompt to increase quality of response<br>▪ Interviewer can be flexible and probe for more detail | ▪ More costly than self-complete surveys<br>▪ Qualitative data can be hard to analyse<br>▪ Interviewers can bias client's responses |

| Method | Purpose | Advantages | Challenges |
|---|---|---|---|
| Documentation review (finances, memos, minutes, etc) | To understand how a project works without interrupting it | ▪ Can obtain comprehensive and historical information<br>▪ Doesn't interrupt the project or visitors' routine<br>▪ Uses existing information | ▪ Can be time-consuming<br>▪ Information might be incomplete<br>▪ Inflexible means of data collection<br>▪ Restricted to what already exists |
| Observation, (occupational mapping) | To understand how people use a project (for example interpretation) | ▪ View people actually using interpretation, events, etc<br>▪ View experiences as they are occurring Can adapt to events as they occur | ▪ Can be difficult to interpret observations<br>▪ Observers can influence behaviour of project participants<br>▪ Can be expensive |
| Focus groups | To explore a topic in depth through group discussion | ▪ Can gain reliable, detailed responses<br>▪ Can be an efficient way to obtain depth of information in short time<br>▪ Opportunity to probe responses more deeply<br>▪ Flexibility | ▪ Can be difficult to analyse responses<br>▪ Need a good facilitator to keep discussion on track and ensure all participate<br>▪ Small sample size<br>▪ Can be expensive and complicated to organise |

Monitoring can be costly and time consuming and so it is important to take full account of monitoring requirements during project planning and to allow for the costs of monitoring during budgeting.

Find out if any data is being collected which you could use to help evaluate your project – for example existing counts of visitors or surveys, which already take place which you could add questions to. Most local authorities have an economic model to estimate the volume and value of tourism – one of these STEAM, which is used by many authorities, can be used to estimate impacts on a smaller scale, for example for a specific area or project – check with your local authority's tourism or economic development department. If in doubt, get some help. Many local authorities have research expertise and can provide advice or help with surveys.

The Cross Lakes Shuttle is a though ticketing project for bus and boat operators in the south of the Lake District, which allows visitors to travel by a combination of modes between Bowness and Coniston. The project was set up in 2002 by a public and private sector partnership.

The aim of the project is to reduce the number of car journeys on congested roads in the area. A programme of evaluation was built into the first three years of the programme to measure outputs (number of car journeys saved) and to evaluate aspects of the project. Over the three years, the evaluation results were used to:

- Increase the effectiveness of promotion
- Change the timetables operating times and routes to meet visitors needs more effectively
- Identify target market segments most likely to use the service

Some significant changes were made to the project as a result of the evaluation, including re-focussing the promotion away from cyclists – originally thought to be a key target market, but who failed to respond to the project, changing the promotion methods used, away from radio advertising and towards more promotion in hotels and B&Bs, and changing he timetable and routing.

As a result of the monitoring, the Cross Lakes Shuttle is one of the most successful schemes of its kind in the country, has won awards and is on the way to breaking even ahead of schedule.

More information: www.lake-distirct.gov.uk and barney.hill@lake-district.gov.uk

***Key Notes for Evaluating Your Project***

- **Evaluation will be required by funders; it can also help you to manage your project**
- **Be clear about what you need to evaluate and what you will do with the information once you have it**
- **Try to incorporate any monitoring into tasks that are already being done**
- **Find out if there is existing information collection which you can use**
- **There are many methods of collecting information for evaluation; each has advantages and disadvantages**
- **Consider what you need to know, who you can get the information from, how you can get it, when you need to get it and what resources you have available**
- **Above all, plan for evaluation from the start**

***Key Notes for Small Scale Projects***

*Evaluation will help you to know how effective you have been and is a specific requirement of many funders (particularly public sector organisations)*

*Evaluation is often an after-thought and, as a result, becomes a problem. Plan for evaluation in advance to avoid this situation.*

*Make sure you allow for evaluation in your financial projections and business planning.*

*Only collect information that you are going to use – you can waste a lot of effort on collecting data, which is of interest, but of no great help.*

*Find simple, low-cost ways of collecting the information you need, including looking at what information is already being collected and using this if appropriate.*

*Act on what you have collected to communicate success, address any weaknesses, identify opportunities for developing your project, etc.*

# APPENDIX

## Resources

### International Centre for the Uplands – University of Cumbria

The International Centre for the Uplands – Cumbria was set up in 1974 as a response to the vulnerability of upland landscapes to economic pressures and a recognition of the need to develop ways of recognising the inter-dependence of the different strands of the rural economy.

The Centre was managed by the University of Lancaster until September 2007 but became the International Centre for the Uplands, University of Cumbria on 1 October 2007.

The International Centre for the Uplands has managed the Northern Uplands Sense of Place Project with financial administration provided throughout by Lancaster University.

As part of the Faculty of Science and Natural Resources the Centre continues its broad remit of supporting upland communities in developing a voice in the policy arena by implementing relevant applied research, challenging thinking, celebrating the landscapes and communities in the uplands and looking broadly at national and international experiences in order to help develop a sustainable future for these precious landscapes. The Centre now includes teaching staff and offers graduate, post-graduate and Continuous Professional Development training.

### Northern England Leader+ Groups

The current Leader+ programme comes to an end in 2008; however, a new programme will then replace the old one – check the websites for news.

### Cumbria Fells and Dales

Cumbria Fells & Dales LEADER+ group is dedicated to the regeneration of rural Cumbria. We have committed almost £2.5 million in supporting nearly 200 projects, large and small, all of which add value to local products" in a variety of innovative ways. Over the past few years, Cumbria as a whole has been picking itself up and trying to move in the direction of sustainable local development. LEADER+ is at the heart of these exciting changes.

The Cumbria Fells and Dales LEADER+ Programme is committed to giving help and financial support to farmers and local producers who are seeking new and different ways in which they can "add value to local products".

Website: www.fellsanddales@org.uk
E-mail: info@fellsanddales.org.uk
Telephone: 01768 869533
Address: The Old Stables, Redhills, Penrith, Cumbria, CA11 0DT

### North Northumberland

LEADER+ in North Northumberland provides European funding for innovative, rural development schemes that have been initiated by the local community. A total of £1.76m has been secured for this. LEADER+ will allocate funding until December

2006 (to be completed/spent by 2008).

The Local Action Group (LAG) has responsibility for the delivery of LEADER+ in North Northumberland. This group is made up of individuals from community groups and statutory agencies in the area. Supporting the LAG are a full-time Project Manager and Administrator, who can offer advice and support to community groups to take a project forward.

Website: www.ca-north.org.uk (click 'projects' then 'LEADER+)
E-mail: info@leader-northumberland.org.uk
Telephone: 01668 283898
Address: 52 High Street, Wooler, Northumberland, NE71 6BG

**North Pennines**

For the North Pennines Leader+ programme, contact the North Pennines Area of Outstanding Natural Beauty Team as follows:

Website: www.northpennines.org.uk
Email: info@northpenninesaonb.org.uk
Tel: +44(0)1388 528801
Address: Weardale Business Centre, The Old Co-op Building, 1 Martin Street, Stanhope, County Durham, DL13 2UY

**Bowles Green Limited**

Bowles Green Ltd is a small consultancy business based in North Yorkshire. It provides a range of services to organisations operating in the heritage, recreation, tourism and conservation sectors. It's consultants have wide experience of 'sense of place' projects and of rural regeneration from their work throughout the UK, in Europe, Africa, the Caribbean and the Falkland Islands.

Website: tba
E-mail: info@bowlesgreen.co.uk
Tel: 01439 788980
Address: Vale House, Oswaldkirk, North Yorkshire, YO62 5YH

## Self-Guided Interpretive Trails

### Introduction

Interpretive trails (on foot, by bicycle, public transport of car) encourage users to explore an area at the same time as learning interesting ‘snippets’ which add to their ***Sense of Place***. They work best when they are properly planned and themed, so that the ‘snippets’ add up to a whole story – see Guideline 1.

If the following apply to your project, a self guided trail is likely to be popular:

- You know that your visitors are interested in walking (or another mode) and that they prefer to explore independently rather than as part of guided walking tours
- You have visitors in your area at a variety of times of year
- Your story is best illustrated by a variety of sites, which are not overly- sensitive and which can be reached via well-maintained rights of way

We are fortunate in England to have an extensive network of footpaths, bridleways and other rights of way which can be used by pedestrians and wheelchair users. These guidelines thus recommend using only rights of way. Numerous North American interpretation text books provide advice about developing new interpretive trails and these references are noted under ‘For more information’.

*Interpretation Method?*

There are four main options for how you present your route and interpretation information:

- Printed on a leaflet
- Way-marked and signed trail
- Sculpture trail
- An audio tour

Which one is most suitable for your project will depend on factors such as the resources and infrastructure you have for the distribution and sale of leaflets, tapes CD’s or ‘wands’ and the resources you have for maintaining signs. It is also very dependent on the nature of your area and route; please remember that signage may be seen by some local people and visitors as intrusive and could spoil some people’s sense of discovery. Interpretation with a light ‘foot print’ is usually best so, if you have local outlets where leaflets could be sold or given away, and if you do not think the leaflets will cause a litter problem, it may be best to consider a leaflet rather than signs.

Audio guides can be expensive to produce, but have the advantage of being accessible to most visually impaired users. Their production is a specialised area about which it would be best to consult a contractor. However, if quoted costs for audio tape or CD production do not result in a prohibitive sale price, this method also has a light interpretive foot print. It is also possible to produce MP3 files which can be downloaded to a device from your website.

*Developing Interpretive Trail Interpretation*

Whichever form of interpretation you choose for your route, the process is broadly the same, as follows.

1. Identifying Suitable Routes

Select potential routes in consultation with landowners in the area as well as with other people who know your area well. In doing so, try to choose routes which:

- Illustrate appropriate stories
- Are capable of sustaining potentially large numbers of walkers, depending on the anticipated size of your market
- Are along public rights of way or permitted paths which are licensed. The length of the licence for a permitted path should be considered as part of the route's suitability for inclusion in a leaflet
- Include, in any series of routes, ones suitable for people with a range of abilities, including at least one for those with limited mobility. If you are developing only one route, try to match it to most people's abilities. If you cannot, then try to include an interesting section which is accessible to people with mobility impairments
- Are safe following risk assessment and the implementation of appropriate actions to reduce risk
- Are likely to appeal to your market and sell well if they are to be charged for.
- Link with local amenities like cafés, shops, toilets
- Begin from a central point such as a bus stop, train station, town centre, information point or car park

2. Describing the Route

Your route description needs to be correct and clear. This is best achieved if it is written:

- By pairs of people, who are not already familiar with the area, and who can discuss the most appropriate wording as they walk along the route
- As if the potential reader would not have a map available
- Assuming that walkers are not fit or may be accompanied by small children and so be walking slowly. Time and grade the route accordingly; it is useful for potential users to be able to see at a glance the walk's length, how long it is likely to take them, whether it is an easy moderate or hard walk and what sort of surfaces they can anticipate. There are official grading methodologies for routes which you may be able to obtain from your local authority's rights of way or access officer
- Assuming that walkers are completely new to the area and do not know any of the landmarks – describe them rather than calling them by name
- Using landmarks which are visually obvious to help people find their way e.g. a public footpath sign saying 'To Kirkby Stephen'
- Precisely; if it is a ladder stile, call it that. If it is a gate, say so. But beware of using landmarks which are likely to change in the near future e.g. temporary signage, ladder stiles which you know are soon to be converted into gates
- Keeping descriptive sentences short rather than rambling
- Offering short cuts where appropriate e.g. via a bus for part of the route, but be sure to describe them too

3. Test the Route Description and Risk-Assess It

Your route should be test-walked (or ridden) by someone who is not knowledgeable about the area, and who has not walked the route before. This person should also be trained in risk assessment and should risk-assess the route and its description. The description should then be amended to include the risk minimisation suggestions, appropriate safety information (see below) and any appropriate behavioural guidance, such as the Countryside Code.

In countryside locations, as a minimum, it is best to recommend that people use the relevant OS map as well as their leaflet, that they wear strong boots and take layers of clothing, including raingear. They should take food and drink, and if they are going onto fells, also take a compass, which they should know how to use. They should check the weather forecast before they leave and tell someone what their route will be. In urban or more managed locations, such as country parks where there are surfaced routes and facilities for visitors, it might be adequate to provide information on location, opening hours, etc. The designer of the route needs to make a judgment.

4. Consult Landowners and Managers about the Route Description

Landowners and other interested parties should now be sent a copy of the route details, including the text for any printed or audio material, and asked for their comments. Give them a deadline to respond and let them know that if you haven't heard from them by the deadline, you will assume they are happy with the description. Once the deadline has passed, make any necessary amendments (after first checking them on the ground) and send a copy of the final text back to land owners and managers for their information. Tell them when you expect the leaflets to be in circulation.

5. 'Mapping' to Complement the Text

Many people who buy or use walk leaflets are not confident map-readers. As such, it will help them if you use a 'bird's eye view' graphic rather than an actual map.

Whatever kind of mapping you include, you must sort out **copyright** prior to printing. Unless you use a pre-copyright map as the base from which you draw a new map or bird's eye view, you can be liable to pay royalties to Ordnance Survey, or another map originator, which can involve a substantial fee.

Since pre-copyright maps do not always have up-to-date boundaries, roads and buildings on them you may have to use a copyright map to redraw a map, so you need to make appropriate arrangements to cover copyright. One of the best ways to avoid royalties is to work with a local authority as lead partner in your project. In this case, the authority's OS licence may cover map use in your leaflet. But please do not assume it does, check with the authority's mapping section and if they think you are covered, they will tell you what copyright acknowledgement text you must include.

6. Getting Your Leaflet Designed and Printed

A good designer will find an attractive way to combine your text and graphics so that it is user-friendly for walkers. They will also get a number of print quotes for you. If you want to own the copyright to the leaflet's design, you must state this in any contract you agree with your designer and get them to sign an agreement that they relinquish copyright. Without that signature, they own it, not you. If you own it, you are at liberty to amend or reprint as you choose using whichever company you choose.

Only print sufficient numbers of leaflets to last 3 years, based on relatively conservative estimates of uptake/purchase. It might seem tempting to get twice as many for a few extra pounds, but what do you do with those you may not have used when updates are necessary?

It is helpful to consider distribution at this stage, as this will help you to determine the print run. Think about which outlets would want to stock your leaflet and ask them how many they would expect to give away, how they would like to display them and what formats they think would be most popular.

7. Professional Indemnity Insurance

It is recommended that whoever authors the leaflets should have professional indemnity insurance; this could be your group if you decide to write your own leaflet, or your contractor. In the latter case you should ask to see their insurance certificate and have a contract which states that they must indemnify you against any member of the public being hurt as a consequence of the route description and associated safety advice.

**Producing Interpretive Panels**

*Introduction*

Interpretive panels are one of the most common methods of non-personal interpretation. They require good interpretive content and effective writing – see below.

*Producing Interpretive Panels*

Interpretive panels are very common, as are orientation and information panels. Some panels try to do all three jobs – usually at the cost of the interpretation.

Good interpretive panels are well written and illustrated, appropriately produced and well sited.

The production process begins with the interpretive planning outlined above. Once you have decided that the best tool for your job is an interpretive panel there are several phases involved:

<u>Research Potential Content to Finalise your Theme.</u>

Plan the panel's content so you know what it should say and what you would like photographs or illustrations of.

<u>Agree the Location</u>

Agree the best location for a panel with a local authority planning officer. As a minimum, you will need advertising consent to display your panel, so the sooner you seek and take a planner's advice; the more likely you are to be granted that consent. If it is your intention to house the panel in anything more than just a frame mounted on posts, you may also need planning permission. Your planning officer will also be able to advise you about this.

Remember to consider the safety of any location, to risk assess it ahead of time and carry out any procedures to minimise the risk of a panel such as making sure it does not have sharp corners.

You should also remember that a sign in full sunlight will fade in a few years, even with light-resistant inks, and that one under trees may suffer from leaf or algal build up and may need special drainage.

Begin Sourcing Images

Finding appropriate photographs of a suitable quality can take a long time, as can commissioning new illustrations. You need to agree who will hold the copyright of any images you commission. However, most organisations can usually only afford to buy ‘license to use’ of an image rather than the actual copyright.

Write the Text

Write the text to complement any images you expect to use.

Hire a Designer

Unless you have strong design skills amongst your team you will need to locate and hire a good designer. A designer can be a useful intermediary between you and the sign maker, but some sign companies have good designers on staff. Brief the designer about your project and what you are trying to achieve. Ensure that you tell them you want your panel to be accessible to as many people as possible. This means practices such as:

- Using clean, simple fonts such as this one (Arial)
- Using good contrast, especially between text and its background
- Avoiding upper case text
- Not justifying or centring text (other than headers)
- Making sure text meets the minimum recommended sizes – 48 point for introductory text and at least 18 point for body text. See BT’s Countryside Access for All Manual for additional advice.
- Not putting text over complex images
- Not shadowing text
- Avoiding reflective/glossy print
- Having a clear text hierarchy

As with all work with designers, agree who will hold the copyright to the finished design for the panel. If you want to own the copyright to the panel’s design, you must state this in any contract you agree with your designer and get them to sign an agreement that they relinquish copyright. Without that signature, they own it, not you. If you own it, you are at liberty to amend the panel as you choose using whichever company you choose. Agree a timescale for first and second proofing of your panel, as well as its manufacture and installation.

He or she will be able to advise you about the advantages and disadvantages of various design approaches and materials so that you can agree early on what materials will work best on your site and for your story. Design and manufacturing technology moves very fast, but some of your main options will include digital printing of light-resistant inks onto a variety of materials:

- Acrylic. Designs are again printed onto paper, which is inserted between layers of acrylic. This is the cheapest but least durable of the following methods.
- Glass reinforced plastic (GRP). Designs are either printed in gel coatings on the GRP or onto paper which is then embedded in GRP. GRP is strong.

- Laminated melamine. Designs are printed onto resin-impregnated paper and then encapsulated in melamine. This wears well and resists vandalism.

Other methods include casting plaques in aluminium or bronze, sandblasting wood or stone (not usually good for detail) or etching in stainless steel.

There are lots of ways of ‘housing’ panels (such as on plinths, in a frame on posts or in specially-constructed ‘shelters’) and you should agree the most appropriate method with your designer and/or sign maker. Remember that any housing should maximise access for all and, at the very least, be in a place accessible to wheelchair users and at a height to allow a wheelchair user to read the panel.

Proof the Draft Design

Get more than one person to do this. You need to consider:

- Do you like the designer’s overall approach?
- Does it grab your attention?
- Is it easy to follow?
- Does it still read properly?
- Have any typos or grammatical errors come to light?
- Is it attractive and comprehensible to someone who knows little or nothing about the subject (i.e. test it on some people who do not)?

You will need to suggest any amendments and communicate your ideas clearly to your designer.

Proof the ‘Final’ Design.

Get more than one person to check this version **very** carefully. You need to look for typos, check alignments of text, make sure photographs or illustrations are not back to front, be confidant that all the changes you requested have been made and that everything is correct.

Installation

Your team can carry out installation if it includes technical staff, or failing that, by the sign makers, who will then charge you accordingly.

Remember to make sure that the area in front of the panel is safe, accessible and of a suitable surface to withstand lots of people standing on it and to permit access by wheelchair users (grass often gets eroded).

Evaluation

Make sure that you find out whether your panel does the job you set for it by asking users what they think of it. If it does not, make any necessary amendments.

Maintenance

A poorly-maintained sign gives out all the wrong messages. Get someone to check its condition regularly and keep it clean and in good repair.

## Interpretive Writing

*'In drying plants, botanists often dry themselves. Dry words and dry facts will not fire hearts'* ***John Muir***

*Introduction*

Good interpretive writing really can bring your ***Sense of Place*** alive. It is critical to the success of interpretive panels and publications and so adds value to your project. Though interpretive writing is a skill, it is one that you can develop if you remember the main principles of interpretation:

You need to:

- **Tell a story**
- **Provoke** a reaction and catch the potential reader's attention
- **Relate** the writing to the reader, not least by involving them
- **Reveal** something that the reader doesn't already know

*Knowing your Reader*

If you know a little about your reader you can aim your writing at their interests and enhance their existing knowledge. Unfortunately, we often do not know enough about our readers and we have to aim our writing at 'the general public'.

*Writing for the General Public*

People have varying levels of literacy and ability to understand the English language. This means you need to keep things fairly simple and accessible. The following points will help you to do so:

Aim at a Reading Age of 9-12

Use language which can be understood by older children, which includes few technical or scientific terms, and most people should be able to understand it. A good example of this kind of writing is that used by tabloid newspapers.

The importance of this approach is now recognised internationally and is led by the Plain English Campaign (www.plainenglish.co.uk).

Microsoft 'Word'© will measure the readability of your text based on the number of syllables per word and the number of words per sentence. Under 'Tools' select 'Spelling and Grammar' and then 'Options'.

Short *is* Sweet

How many times have you glanced at a headline that caught your attention and then decided you couldn't be bothered to read all the text below it? In this age of 'information overload' most of us are choosy or lazy about what we can be bothered to read.

This is especially true for visitors intending to have a good day out. Be succinct and make sure your designer does not create 'dense' designs which give your publication or panel the appearance of having too much text.

A Picture *Really is* Worth a Thousand Words

Using strong images with engaging captions not only encourages people to look at your publication or panel; it can also save you a lot of writing. Perhaps most importantly, a picture can usually be understood by people with low literacy or cognitive impairments and by people who do not speak or read English.

Whilst the perfect photograph can be hard to find, you can always commission an illustrator who can use artistic license to tell your story. The sustainability exhibition at the North York Moors National Park Visitor Centre at Sutton Bank and Dalby Forest Visitor Centre, also in North Yorkshire are good examples of 'word-free' interpretation.

Layer Your Writing

Research shows that there are different kinds of readers, especially of panels and exhibitions. The majority of people just look at the pictures and perhaps read the headlines. A few people will also read the introductory text but only a small minority will go on to read the main text.

This means that you need to 'tell your story' i.e. communicate your theme in all layers of your text.

And for the occasional enthusiast, who reads the whole thing, remember to direct them towards additional sources of information.

It's not what you say, but how you say it

In interpretation, writing style can make the difference between your reader relating to your text or not. Consider the following techniques:

- Draw in your reader by referring to them in the first person, i.e. address them as 'you'. As an example, compare
    - 'You can see the axe marks made by the builders' to
    - 'The axe marks made by builders can be seen'

- Use active rather than passive verbs. As an example, compare
    - 'Look out for herons on the river' to
    - 'Herons may be seen on the river'

- Ask questions of the reader. This ensures that your reader is not just a passive receptacle for information but that they engage with it, think about it and make connections with their existing knowledge

- Ask the reader to try put themselves in the story you are telling, e.g. 'Can you imagine the activity, noise and smoke here as miners brought up the ore and smelted it over open fires?'

- Use comparisons, analogies and metaphors. This will help your reader relate a new idea to something they already know about, e.g. 'Just like us, animals need a place to live where they can find food and water'

- Let a character tell your story. This works especially well for audio tours of historic sites. As an example, instead of a dry rendition of what was found below stairs in a grand Victorian house, introduce the cook and she can share her knowledge of the comings and goings of staff to create of picture of what life must have been like below stairs

- Avoid technical terms, jargon and sensitive words or phrases. E.g. instead of ‘man’ use ‘we’ or ‘people’ instead

- Write short sentences and paragraphs so that you hold the readers attention. This will be easier if you try to use only one idea in each sentence

- Use humour – but with care because not everyone finds the same things funny. But well used humour will engage your reader and help them to relate to your story

Use critical editors

You need others to check and review your writing, not least because they see and think of things that you are too ‘close’ to see. Don’t be precious about your writing and, if possible, leave it a few days after finishing a draft before reviewing it in the light of other people’s comments.

**For further information**

Carter, J. **Plant the Standard in my Navel**. Interpret Scotland journal no. 4, 2000.

Ham, S. **Environmental Interpretation**: A Practical Guide for People with Big Ideas and Small Budgets. North American Press, 1992. Sometimes available through Scottish Natural Heritage at sgp@snh.gov.uk, Tel. 01738 444177. Usually available to buy on-line from www.acornnaturalists.com

Scottish Natural Heritage – on-line interpretation guidelines at www.snh.org.uk under ‘Interpretive Guidelines’

The Plain English Campaign. www.plainenglish.co.uk

Trapp, S, Gross, M & Zimmerman R. **Signs, Trails and Way-side Exhibits**. The Interpreter’s Handbook Series. University of Wisconsin Press. Sometimes available through Scottish Natural Heritage at sgp@snh.gov.uk, Tel. 01738 444177. Usually available to buy on-line from www.acornnaturalists.com

Veverka, J. A. **Interpretive Master Planning** Falcon Press, 1994. Sometimes available through Scottish Natural Heritage at sgp@snh.gov.uk, Tel. 01738 444177. Usually available to buy on-line from www.acornnaturalists.com

**Communications Media Selector and Checklists**

Messages

- Is your message clear?
- Is your message too complicated?
- Is your message relevant to your intended audience?
- Is your message well designed for the delivery mechanism we have chosen?
- Are the benefits to the receiver clear?
- Is the call to action simple to understand?
- Have you used words and images to best effect?

Target Audiences

- Can you build a profile of your target audiences?
- What are their characteristics - age, location, lifestyle, etc.?
- Are there times when they will be more receptive to your message?
- Are there times when they will be less receptive to your message?
- How do they normally receive information on this issue/area of interest?
- Are they in regular contact with or could they be influenced by any particular organisations, businesses, etc?
- Are there opportunities to reach your audiences that you might not have considered before?

Delivery Methods – Media

- Which medium or combination of media will be most effective?
- Are you trying to reach a mass market or a clearly defined 'niche' market?
- What can you afford?
- Can you find partners to work with?
- How many people will you reach?
- How frequently will they be exposed to your message?
- What is the cost per 1,000 'hits' of different options?
- What is the nature/quality of the exposure to your message?

Resources

- Have you included all of the costs, including monitoring?
- How much do you need to communicate effectively
- What are the budget constraints?
- Can you be more cost effective by working with one or more partners?

Monitoring

- How can you monitor the effectiveness of your communications?
- What was the cost per response?
- Are there simple, cost effective ways like coding adverts of reply coupons?
- How do you ensure that this information is collected and used?

The Table below shows Communications Methods: Media Suitability Grid

| Method | Information Capacity | Raising awareness | Encouraging involvement | Responding to interest | Notes |
|---|---|---|---|---|---|
| Posters | Low | Yes | - | - | ▪ Use to raise awareness, to remind or to build an image<br>▪ Can contain powerful visual images. Pictures speak a thousand words. |
| On site provision eg signs | Low | - | - | Yes | ▪ Use to raise awareness or to remind.<br>▪ Only for simple messages particularly about behaviour or news |
| Leaflets | Low | - | Yes | Yes | ▪ Leaflets are best used for responding to an existing demand or interest rather than for creating the interest in the first place.<br>▪ Combines text and images. Can contain complex messages. |
| Publications eg guides | High | Yes | - | Yes | ▪ Own publications and those for professional audiences can carry complicated messages.<br>▪ Can combine text and images. |
| Magazines | Medium | Yes | Yes | Yes | ▪ Use for news or more complicated messages for specific audiences. Text and (often) high quality images can be used. |
| Local newspapers | Medium | Yes | - | Yes | ▪ Use for news or general messages. Can develop a story over a long period of time. Looking for local interest stories and news. Charismatic individuals or attractive locations/subjects usually receive coverage.<br>▪ Need to develop relationship with editor or journalist |
| National newspapers | Medium | Yes | - | - | ▪ Looking for stories of national relevance, or local/regional stories with major impact. |
| Local radio | Low | Yes | - | Yes | ▪ Use for news items. Chat shows for more complicated messages |
| National radio | Low | Yes | - | - | ▪ Use to deliver specific messages to targeted audiences, e.g. through natural history or transport programme |
| Television | Low | Yes | - | - | ▪ Use for awareness. TV stations demand attractive locations and charismatic individuals. Danger of loosing the message in the presentation. |
| Ceefax/oracle | Medium | - | - | Yes | ▪ Use for delivering news of events, etc. |
| Films/video | High | Yes | - | Yes | ▪ Use to explain, educate of create awareness of a complicated subject |
| Internet | High | - | Yes | Yes | ▪ Content unlimited (except by cost). Allow users to use at superficial and in depth way for maximum effect. |
| On line information systems | Medium | - | - | Yes | ▪ Use to deliver information on places to visit, events, etc. |

| Method | Information Capacity | Raising awareness | Encouraging involvement | Responding to interest | Notes |
|---|---|---|---|---|---|
| Events/ exhibitions | High | Yes | Yes | Yes | ▪ Platform to distribute messages and literature, also to speak to people. Use to support other communications activity. |
| Training courses/ conferences | High | Yes | Yes | Yes | ▪ Best used to deliver detailed information to an interested audience. |
| Direct mail | Medium | Yes | Yes | - | ▪ Use to create awareness, encourage participation. Opportunity to trigger a response and to develop and manage a database of professional or consumer contacts. |
| Personal contact | High | Yes | Yes | Yes | ▪ Most effective form of communication, also expensive. Use selectively |

Communications Methods: Media Reach Grid

| Method | Local/ regional | National | Potential Audience | Notes |
|---|---|---|---|---|
| Posters | Yes | - | Small | ▪ 48-sheet roadside posters; 4-sheet posters on bus shelters, in shopping areas and at railway stations; 'free sites' include notice boards in libraries, schools, workplaces, hotels, village halls, etc.<br>▪ Can target audience through site selection; usually high frequency of exposure to small or medium-sized audience |
| On site provision e.g. signs | Yes | - | Small | ▪ Locate on notice boards, trees, etc.<br>▪ Can reach small audience to deliver message at a relevant time, e.g. at start of visit |
| Leaflets | Yes | - | Medium | ▪ Usually very high wastage. Success depends considerably on quality of distribution<br>▪ Can reach people when they are responsive to messages, e.g. providing information on access at tourist information centres or holiday accommodation |
| Publications e.g. guides | Yes | Yes | Medium | ▪ Message can be 'lost' amongst many others. Difficult to control tone of message in other organisations' publications |
| Magazines | - | Yes | Medium | ▪ Consumer and professional titles. Limited but regular readership.<br>▪ Readership usually well targeted e.g. within a particular interest group. |
| Local newspapers | Yes | - | Medium | ▪ Readers tend to be loyal, reading every day/week. Each copy read by several people (consider circulation and readership).<br>▪ Readership well targeted geographically. |
| National | - | Yes | Large | ▪ As local newspapers. Sunday papers often carry more in depth reports. |

| **Method** | **Local/ regional** | **National** | **Potential Audience** | **Notes** |
|---|---|---|---|---|
| newspapers | | | | ▪ Readership targeted by lifestyle or socio-economic group |
| Local radio | Yes | - | Medium | ▪ Listener profile changes throughout the day, e.g. mornings/evenings reach people at home before work and commuters in cars; afternoon reaches housewives and retired people at home.<br>▪ Listeners well targeted geographically. |
| National radio | - | Yes | Large | ▪ As local radio<br>▪ Listeners targeted by lifestyle group or by interest (e.g. preferring news and sport or different types of music) |
| Television | - | Yes | Large | ▪ The mass market medium. National and regional news programmes and advertising rates.<br>▪ Limited targeting possible on geographical basis and through advertising timed with particular programmes. |
| Ceefax/oracle | - | Yes | Medium | ▪ No targeting possible. |
| Films/video | Yes | Yes | Medium | ▪ Effective distribution governs success. Education and affinity groups are likely to respond to this medium |
| Internet/World Wide Web | Yes | Yes | Medium/large | ▪ Some targeting possible through website links and pro-active use of e-mail. |
| On line information systems | Yes | Yes | Medium | ▪ Access points include libraries and tourist information centres. Possible to 'share' existing delivery systems |
| Events/ exhibitions | Yes | - | Small | ▪ Provides opportunity for face to face contact with limited audience infrequently.<br>▪ Audience likely to be targeted by geography and interest; also likely to be receptive to information/messages |
| Training courses/ conferences | Yes | - | Small | ▪ Opportunity for in depth communication with small, normally professional audience on infrequent basis |
| Direct mail | - | Yes | Large | ▪ Purchase addresses by lifestyle group, age group, geographical distribution, post code area, profession, membership, interest, purchases made, etc.<br>▪ Very effective targeting. Total control overreach and frequency |
| Personal contact | Yes | - | Small | ▪ Can be regular on site. High quality, but very small audience |

## Fundraising Checklists

### Getting Started

- Decide whether you are asking for money, peoples' time, 'free' publicity or access to resources
- Make a full costing of what you need to achieve your target
- Draw up a short list of possible organisations/individuals who might be willing to help
- Identify the benefit to them of being associated with your scheme
- Make contact

### Making Contact

- A telephone call should identify the right person to contact
- Research the organisation and the responsibilities of the person you need to approach
- With all the details of your scheme to hand, speak to the relevant person by telephone and gauge their interest. Be as creative as possible
- Follow up the phone call with a letter/proposal depending upon how the conversation went. Stress the benefits of giving you their support
- Telephone again 2-3 days later to ask if they need any clarification
- If the response is positive, arrange to meet to give a presentation of ideas

### Making Your Case

- Selling points – Include the key reasons why the scheme is important and why donors will want to support it. Describe the scheme, why it is important and worth supporting
- Facts and figures – Provide evidence to demonstrate the importance of the scheme, the extent of the need, the value and the success of the methods to be used
- Credibility and endorsements - Endorsements and statements from others who support the scheme and what will be achieved overall
- Scheme plan and budget - The financial plan for the scheme, costed and covering all the items of expenditure to be incurred
- Back-up literature - Brochures, annual reports and other information available to attach to the written proposal, which will enhance the case and improve chances of success

## Sources of Information

*Funderfinder Ltd* provides software and other resources with information on grants from charitable trusts and foundations in the UK

www.funderfinder.org.uk
Tel: 0113 243 3008

The Directory of Social Change – has websites, printed and electronic resources, training, etc for community organisations seeking funds

www.dsc.org.uk – for general information of the DSC
Tel: 08450 77 77 07

www.companygiving.org.uk – for information on company giving
www.governmentfunding.org.uk – for information on UK government grants
www.trustfunding.org.uk – for information on giving by trusts and foundations

*The Institute of Fundraising* (previously known as the Institute of Charity Fundraising Managers) provides advice, training, quality standards and access to fundraising professionals

www.institute-of-fundraising.org.uk  Tel: 020 7840 1000