



National Audit Office

## Promoting Participation with the Historic Environment

**METHODOLOGY**

## Methodology

This report examined how effectively the Department for Culture, Media and Sport and English Heritage have pursued Public Service Agreement 3 to increase the diversity of people participating in heritage, and considered English Heritage's role in helping to deliver the Department's contribution to Public Service Agreement 21 to increase participation more widely. We looked in detail at the performance management framework through

which the Department has incentivised English Heritage to contribute to its targets on participation, and the actions English Heritage has taken in supporting the wider heritage sector and at the properties it manages.

The main elements of our fieldwork, which took place between January and April 2009, were:

### Selected method

### Purpose

#### 1: Review of key documents

We reviewed English Heritage's national, regional and departmental strategies. This review centred on English Heritage's strategy for 2005-10, and the documents which supported both the development and implementation of this strategy, including business plans for the period and delivery plans for departments within English Heritage.

To inform our understanding of English Heritage's strategy, and how it contributed to the Department's objectives.

We reviewed the investment plans for properties visited (Method 5).

To understand the rationale for the investment, and the process by which English Heritage evaluates the investments it makes.

We reviewed English Heritage's funding agreements with the Department for Culture, Media and Sport and associated progress reports.

To understand the performance framework in place to incentivise English Heritage, and to review performance measures against good practice.

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### 2: Evaluation of secondary data

We reviewed secondary data from a number of sources including:

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| <ul style="list-style-type: none"><li>■ English Heritage visitor surveys. Every summer English Heritage carries out visitor surveys at its charging properties. The most recent data available was from summer 2008 when 1,778 interviews were conducted with visitors to English Heritage's top ten most visited sites.</li></ul> | <p>To find out what visitor feedback is available to property managers. To understand the methodology by which demographic information about English Heritage's visitors is collected and used.</p>   |
| <ul style="list-style-type: none"><li>■ Visitor and income data. We reviewed English Heritage's financial and visitor numbers data for English Heritage's charging properties over the period 2003-04 to 2008-09.</li></ul>  | <p>To identify trends in performance across English Heritage's properties. We also used our analysis of the data to inform the selection of properties we would visit (Method 5).</p>   |
| <ul style="list-style-type: none"><li>■ Results of the Department's participation survey – <i>Taking Part</i>. We reviewed the results of Taking Part over the period 2005-06 to 2007-08, and the quantitative analysis English Heritage commissioned of the 2006-07 survey results.<sup>1</sup></li></ul>                         | <p>To understand how the Department's performance in delivering Public Service Agreements 3 and 21 is measured. To understand the existing quantitative evidence for why people choose to participate in heritage.</p>                                |
| <ul style="list-style-type: none"><li>■ Trends data from Visit Britain on visits to leisure attractions. The most recent data available was for 2007.</li></ul>  | <p>To understand the performance of the wider heritage sector, and to assess the proportion of heritage visitor attractions English Heritage is responsible for (based on the number of heritage attractions invited to take part in the survey).</p> |

### 3: Literature review

We engaged consultants, Governance International, to analyse existing research and identify good practice on how organisations influence the behaviour of others and reviewed existing National Audit Office reports to identify good practice in partnership working.

To understand how English Heritage could support and influence the heritage sector to broaden participation, and to develop questions for our survey and workshops (Methods 7 and 8).

We reviewed published research on the barriers to participation including:

To understand existing knowledge of the barriers to visiting a heritage site.

- *Culture on Demand: Ways to engage a broader audience*, the Department for Culture, Media and Sport, 2007.
- *Heritage Counts 2006*, The Historic Environment Review Executive Committee, 2006.
- *Easy Access to Historic Landscapes*, English Heritage, 2005.
- *Making Heritage Count? Research Study Conducted for English Heritage*, the Department for Culture, Media and Sport and the Heritage Lottery Fund, 2003.

<sup>1</sup> Main technical report: Attending heritage sites, a quantitative analysis of data from the Taking Part survey, Centre for Economics and Business Research Ltd, July 2007.

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### 4: Semi-structured interviews

We carried out semi-structured interviews with staff from the Department for Culture, Media and Sport.

We also interviewed English Heritage staff working in:

- Properties
- Marketing and Events
- Education
- Outreach
- Social Inclusion Policy

To document the performance frameworks in place for PSAs 3 and 21 and understand how the Department evaluates the performance of English Heritage.

To identify:

- how English Heritage's strategies had been implemented;
- the extent of activities undertaken to address barriers to participation; and
- the level of partnership working within the heritage sector.

### 5: Visits to properties

We visited nine English Heritage properties which charge for entry and conducted semi-structured interviews with site staff.

We selected the properties to cover different levels of visitor numbers, a geographical spread and a range of property types.

We visited:

- Audley End, Essex (historic house and gardens)
- Birdoswald and Housesteads, Roman forts, Cumbria and Northumberland respectively
- Dartmouth Castle, Devon
- Dover Castle, Kent
- Kenilworth Castle, Warwickshire
- Osborne House, Isle of Wight
- Rangers House, London
- Stonehenge, Wiltshire

We also visited a National Trust property, Osterley Park in London.

To understand how properties are used to broaden participation by examining:

- the property strategy, which included consideration of marketing activities, events held at the site, commercial income generation and significant investments;
- the accessibility of the property to the Department's priority groups;
- what educational and outreach activity take place; and
- what partnership working and volunteering take place.

To see how the National Trust has used its properties to broaden the diversity of its visitors.



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### 6: Examination of outreach and Heritage Open Days projects

We selected a mix of projects to represent a range of target groups, regions and project types. We examined projects based at English Heritage properties and other locations.

In some cases our sample selection was constrained, for example where English Heritage staff responsible for the project had left the organisation and information was not readily available to review. In these cases alternative projects were chosen in discussion with English Heritage.

We reviewed project plans and evaluation reports, where available, for a sample of seven projects and visited two of the projects to speak to the staff, partner organisations and participants.

To establish:

- how the project sought to broaden participation;
- how many people had benefited, and how many of these were from priority groups;
- planned and actual costs and outcomes; and
- how the project had been evaluated and the learning applied.

### 7: Survey of heritage organisations

We engaged consultants, ORC International, to manage a web based survey of heritage organisations. We based our population on members of Heritage Link, an umbrella organisation for heritage bodies.

The survey content was developed by the National Audit Office and ORC International.

Responses to the survey were followed up in greater depth through focus groups and structured telephone interviews.

To evaluate how well the sector felt that English Heritage had supported them to broaden participation.

Of the 86 organisations contacted, 25 responded giving a response rate of 29 per cent. Reasons for nil responses included:

- the organisation did not feel the survey was of relevance to them;
- the organisation was too busy;
- our consultants found it difficult to contact the organisation.

### 8: Workshops with priority groups

We engaged consultants, CESI – Inclusion, to facilitate three workshops with organisations representing the three priority groups.

We held a workshop with each priority group in January 2009.

To identify the barriers to participation and progress being made to tackle them.

In total 18 representative organisations were involved including:

- eight organisations representing people from black and minority ethnic groups;
- five organisations representing people from lower socioeconomic groups; and
- five organisations representing people with limiting disabilities.

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### 9: Interviews with heritage organisations

We spoke to a range of organisations including the heritage bodies for Scotland, Wales and Northern Ireland, and key heritage organisations in England such as the Heritage Lottery Fund and the National Trust.

To identify how other heritage organisations sought to broaden participation.

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### 10: Mystery shopping of grant recipients

We engaged consultants, Cello UK, to conduct a telephone census of all grant recipients not covered by English Heritage's most recent survey.

To establish whether grant recipients were providing public access to their properties as required by grant conditions.

We attempted to contact 523 grant recipients and called each telephone number five times over a two-week period at different times of the day until successful. We were able to speak to 399 recipients (76 per cent).

Of the 124 grant recipients we were unable to contact, the telephone numbers held by English Heritage were incorrect for 27, and of these 20 had been corrected as at the time of publication.

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### 11: Workshop with English Heritage

We engaged consultants, Catalyse, to facilitate a workshop to assess the costs and benefits of English Heritage's activities aimed at broadening participation with heritage.

Our aim was to identify the cost and impact of activities undertaken by English Heritage and how it prioritises and evaluates them. A lack of sufficient data on the cost and impact of specific initiatives meant that this was not possible. Instead the workshop helped develop our understanding of the range of activities undertaken by English Heritage and how it evaluates initiatives across the organisation.

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