

Key reference and data resources for archaeological outreach specialism

Introduction:

Outreach specialists are slightly unusual in the heritage sector in that they do not primarily draw from the large heritage databases, though these of course still inform aspects of the work. Instead they are often more concerned with participant or demographical data such as the socio-demographics of the areas they operate in, or high level studies on barriers to heritage participation. This essay focuses on key reference documents and data resources that are more specific to the role of outreach. It will look at government produced statistics, industry surveys and reports and evaluation frameworks. The below essay will discuss each of these in turn to evaluate their strengths, limitations and credibility.

Government produced demographic statistics:

When planning outreach or producing outreach evaluations, it is key to understand the general context we are operating in (Dayson, 2017). The UK government produces a very wide range of statistical data and makes this available to the public, primarily through the Office of National Statistics (ONS). Outreach projects often consider the socio-economic status of participants and this ONS data is extremely useful in providing a baseline that we can compare our participant data against. This is particularly important in heritage, as participation in heritage has historically been very heavily skewed towards groups of higher socio-economic status. A survey by the ONS in 2019-2020 found "Socio-economic background was a predictor of participation, with 84% of those with 'higher managerial, administrative and professional occupations' participating, compared to 62% of those with 'routine and manual occupations' (Office National Statistics, 2020). As a result simply running a heritage activity with locals from a deprived area does not guarantee that the project will reach underrepresented groups, as participants will often self-select and form an unrepresentative sample. The only way to understand the results is to compare participants with the demographics of the local area, which is something the ONS or other government statistics are well suited to providing.

Any data generated by the ONS or another government department is considered highly accurate and reliable, and they regularly conduct quality reviews (Office National Statistics, 2016). As the government has access to much wider data than any other statistics producer, they are able to produce a large quantity of specific surveys that include data from a wide range of the population. To take the example of income, ONS bulletins are based on a mixture of employer surveys (where the sample covers 13.8 Mio employees) and HMRC PAYE data, which covers a very large proportion of UK taxpayers (Office National Statistics, 2023). As such, their data is the gold standard in breadth and reliability. The data is available for free and online making it readily accessible. As the ONS publish both reports and datasets this data is also very useful for in-depth analysis. The fact that they publish their detailed methodology and maintain datasets over the span of decades makes it possible to use them to track larger trends and changes. The main issue with using ONS data in heritage outreach is that the datasets they publish are usually intended for a broad national audience. As stated in their most recent strategy document the ONS exists to "inform public understanding of the world and our place in it; it informs decision makers to take choices and lets others hold the powerful to account" (UK Statistics Authority, 2020, p. 11). This means its datasets primarily exist to inform wider

policy and debate and often don't align closely with the more specific needs of heritage outreach. As such outreach specialists often need to go through large amounts of ONS data to pull out individual instances directly relevant to their work making ONS data more suitable for providing a baseline rather than forming an integral part of the evaluation or analysis.

So the advantage of the ONS statistics is that there is a very large amount of data both in terms of the amount of the population surveyed but also the detail into which they are surveyed thought is much more actually representative of the population. Also it is freely available online and easily searchable and downloadable. There are also reports published alongside the data explaining it and analysing it that can be used. The downside is that the statistics downloadable online are not always the most up to date statistics on the area as they're not made instantly made viewable online and whilst these are frequently updated versions can be obtained with different methodology and the methodology for the survey data may not be consistent across all regions as depending on when the data for that region has been updated there may small differences when comparing different geographical regions.

In a similar vein the government publishes data on the proportion of students at each school which are eligible for free school meals and the number of children who qualify for special educational needs (SEN). This is a key metric used to target youth outreach activity as it gives a very strong indication of the socio-economic demographic makeup of the school (Hunt et al., 2021). This data is also particularly valuable as schools don't tend to face the self-selection issue noted above. As all children under 16 are required to attend school and they will usually attend on in close geographical proximity of their home, any outreach activity in these schools will engage a relatively representative sample of the local area. This means outreach can be targeted at the areas it would benefit most in a much more precise way than would be possible without this data (Hunt et al., 2021).

Published data on schools is updated annually, by each school which means it usually provides a very accurate picture of the current student body. As it's government mandated and it is in the interests of the school to capture (due to funding being tied to it), the data tends to be highly reliable and relatively easy to interpret. The data is collated on a central online database that is accessible by the public which means it is very quick and easy to access the data (UK Government, 2023). The data is additionally searchable by postcode, making it particularly useful for geographically targeted outreach. While this makes it a very heavily used dataset in outreach it is not without its limitations. Perhaps most significantly schools only publish a very narrow set of metrics. While it can be used to identify a general level of deprivation and to target schools to reach out to, it doesn't provide the level of detail for extensive analysis or evaluation work. As the data provided covers the school as a whole, it can obscure significant differences in year groups particularly in primary schools where the students age will range from 4 to 11. This data will also not cover the details of the school's academic performance (though some of this can be ascertained from the Ofsted report which is also publicly viewable), what subjects are offered and other qualitative factors. This means that the schools database provides a directory which can be used as a starting point to target outreach but needs to be supplemented by additional data collected through contacting the school.

Industry Surveys:

Another data resource are industry surveys and reports. This essay will not go through each of these reports but instead look at these as a generalised resource that can be utilised by community archaeologists, with the specific report to be used for a particular project being dependant on the location, type or demographic the project is targeting. Unlike the governmentally published data, these documents specifically look at heritage. Most relevantly for outreach work the reports cover how and why people are engaging with heritage and even more importantly why people are not engaging with heritage. This represents vital reference data when designing outreach activities as it can inform what strategy may be most appropriate for each project. Having this information allows us to mitigate against previously identified barriers. Some commonly cited reasons in these reports for not engaging with heritage is a lack of time or lack of funds (e.g. in Historic England's 2019 Heritage and Society report). Heritage reports allow a greater understanding and awareness of these factors and how they may influence different demographics which flows into the planning stage of a community engagement project. This is often done when writing an audience development plan, as this not only involves identifying the audiences with which you want to engage with but also identifying the issues that make it difficult to reach this particular demographic.

Industry surveys can help shed light on problems that have already been identified in the area. Making the most of existing data and analysis that has already been conducted on the audiences in which your project wishes to engage is key as it allows you to learn the lessons of the past. Neglecting to utilise this reference data risks that the activities that CA are organising to continue to fail to meet the demographics that have traditionally not engaged with heritage. Potential responses to the findings of heritage reports is to schedule activities outside of the busy periods identified previously or looking at the cost to attend events beyond the simple ticket price. If an outreach event is taking place in a lower income area with a low rate of car ownership then activities should probably not take place in poorly connected areas, or if there are considerations needed to be made regarding the cost of travel, accommodation and food. If CA are targeting families activities need to work for the full age range, as if a project was targeting 6 to 11 year olds of families still may choose not to go because they have younger children for whom they may not be suitable, e.g. because they require reading. This particular issue was highlighted in Cadw's 2022 barriers to visiting heritage sites report (Cadw, 2022). Similarly past reports have highlighted the significance of accessibility to heritage sites that need to be mitigated and have the mitigations clearly communicated to allow this section of the audience to attend (Historic Scotland, 2014). Gathering this information in the audience development plan allows you to choose and schedule the activities around these limiting factors help achieve the overall strategy.

As these surveys are often created by large respected heritage organisations such as Historic England their reports usually have a high degree of credibility. This makes them valuable in encouraging clients to support that work as they credibly highlight an existing gap and offer a concrete suggestion on improving the issue. If a report has shown that people will not pay to attend heritage outreach events this is a strong argument for the client to fund free places.

Of course industry reports also have their own set of limitations. Perhaps the most obvious is that often there will just not be a recent report or publication on the area we are operating in.

Reports like these tend to be produced on an ad-hoc basis and unlike with ONS data there won't necessarily be rolling coverage over multiple years. This also extends to the methodology and focus of the report which is likely to change year on year even if the organisation produces annual reports. Finally there is a lack of standardisation between publishers which can make it difficult to compare different reports even where they nominally cover the same topic. As such heritage reports when they are available offer great insight to inform the outreach strategy for a project, but one has to be able to operate without them and be conscious that the underlying reality in the area may have changed since they were published.

One would think one of the best places to go for reference information on outreach projects is evaluation reports by other companies in the space. These are likely to involve similar outreach activities and will often consider common periods or engagement in certain types of areas, which is likely to be directly relevant to the work of other outreach specialists (e.g. Bonacchi et al., 2014; Haukaas & Hodgetts, 2016; Wilkins et al., 2021). Leveraging on the insights of these evaluation reports should make it easier to identify the types of activities most suitable for any given area and will also give a sense of what kind of outreach has been available in the area in the past. Building on the insights of other outreach specialists could also help avoid pitfalls that may be specific to the area or community.

The issue with this data resource is that while these reports are consistently produced by companies engaging in outreach they are much less consistently published. This is because they are primarily vehicles to prove what outreach was carried out to clients and funding bodies and there is no obligation to make these outputs publicly accessible. Unlike with standard archaeological work there is no clear guidelines on how and what should be published and no wider regulatory body ensuring all work is ultimately published and available. There is a no general consensus in the industry working towards building up a repository of these reports as a source of learnings or insights for the industry as a whole. Where these reports are published it is usually as a method to publicise a success and to advertise the services of the outreach provider. The fact that they are directed at funding bodies and used as case studies also results in the issue that they tend to skew very positive, downplaying any issues that the project may have had and playing up its impact and successes. It is not in the company's interest to give the client or funder the sense that the money was wasted and the outreach did not have a significant impact. Even where the reports are purely factual there is an element of survivorship bias which results in the reports of underperforming projects not being widely published or shared. This doesn't mean these reports cannot be immensely useful to an outreach specialist but they often need to be read critically or more emphasis needs to be placed on analysing the underlying dataset rather than going simply by the headline conclusions of the report.

Evaluation Frameworks

While there are limited guidelines and requirements on the publication of these evaluation reports, outreach specialists heavily rely on key reference documents in creating these reports. This is particularly important when the work is being funded through a public funding scheme such as the National Lottery Heritage Fund (NLHF), but private clients also expect heritage outreach work to meet the goals and standards of specific frameworks. This is driven by the desire to see that their investment had a tangible impact in working towards their strategic goals and created social value and the requirement to base this on some kind of more widely

accepted standard. There is many reference documents that are potentially relevant in this context, and many clients will have their own internal standards and documentation, but this essay will focus on a few of the most common and significant. There is significant value in these documents as they effectively create a common language to talk about heritage impact and make it easier for heritage specialists to create outreach evaluations that will be understood and supported by public and private funders. This essay will discuss the three references frameworks most relevant to my work, NLHF, National Themes, Outcomes and Measures (TOMs) and ClfA.

The NLHF provides very clear guidance on their website as to how they expect work funded by them to be evaluated and make a significant efforts to make these guidelines easy to understand (NLHF, 2017). Their evaluation framework is condensed into a number of readable and comprehensible documents, which don't suffer from the excessive length evaluation frameworks can sometimes tend to. The evaluation framework is designed to be applied at three different levels (Heritage Level, Community Level and Individual Level) which makes it possible to break down the aims of any given project into these categories and ensure you are meeting the requirements at every stage. As a heritage funder the NLHF framework is tailored towards heritage outputs, making it very suitable as a reference for designing outreach work in my specialism. As the NLHF is one of the largest heritage funding bodies in the UK, its framework has a large degree of credibility in the sector and is well understood by many heritage stakeholders. One of the limitations of the NLHF framework as a reference document is that the guidance it provides is relatively high level and general. The intention behind this is to allow heritage organisations to adapt the guidance to a wide range of projects and potentially their own internal frameworks. However this has led to a lack of standardisation between projects, meaning that cross-organisational studies of impact are still very difficult to carry out. Additionally it is very specific to the heritage sector and much of CA's work is funded by clients outside the sector, who therefore struggle to understand the benefits when phrased under the NLHS framework.

A more appropriate reference framework for non-heritage clients, particularly infrastructure projects is National TOMs. National TOMs is a government framework used to measure social value and is implemented by many private companies including those in the development sector (National Social Value Taskforce, 2019). Unlike the NLHF framework this is a framework much more frequently used and better understood by the commercial clients that make up a greater proportion of CA's customer base. It uses language, metrics and measures that are much more in line with what these clients would want to see in the outreach they commission. Key differences include a much higher emphasis on outreach projects delivering employability and sustainability. This has a lot of direct relevance to our role as it is vitally important that the work we do be perceived as valuable to those funding it. Without being able to put this into a framework that fits with theirs it is really difficult to communicate that value, as what archaeologists see is intrinsically value is not necessarily the same as what developers would consider intrinsically valuable (Watson, 2021). This has been strengthened by the fact that developers now have an obligation to produce social value, and if archaeology firms can show them how their work feeds into this requirement it becomes possible to justify much more extensive funding for outreach than previously. The National TOMs framework also allows CA to measure impact that goes beyond the metrics that conventional heritage evaluation

frameworks measure, such as providing work experience, opportunities for workers to upskill, providing employment opportunities providing fair pay for those working within the project.

As National TOMs is a general framework and not specific to heritage it does face the issue that it needs to be adapted to make it relevant to this sector. National TOMs is less accessible the NLHF guidance as there are fees to sign up and it is significantly more complex in what it aims to measure. The complexity means that implementing the framework requires a lot of time investment in upskilling our own team in order to ensure they understand all the relevant standards and requirements. This is part of a wider trend where evaluation is no longer something that can be “bolted on” at the end of the project, but rather needs to be something that is integral to the project’s design. Ultimately National TOMs provides a useful evaluation framework for commercial clients but does require a lot of knowledge on how properly implement it and what needs to be measured in what way.

Conclusion

A final guidance document which has not been discussed in this essay as it has not yet been published is the ClfA Community Archaeology Toolkit (ClfA, 2022) which will be aimed at providing guidance to those who are commissioning archaeological work. It aims “to support community engagement to become embedded into sector practice across the UK, and to provide a framework to promote good and innovative implementation” (ClfA, 2022). Given ClfA’s importance in the industry this framework is likely to become a key reference document for outreach specialists and underpin wider funding decisions once it is released.

As an outreach specialist one has to rely on a wide range of reference documents and datasets to inform any outreach activity. Perhaps more than other specialisms the resources we use differ depending on the client and the objectives of the projects. However, at a high level there is a clear theme with governments data providing a means to target activity and a baseline to compare any impact against. Then industry data and reports, where they are available provide additional information to inform the outreach strategy and implementation. Finally evaluation frameworks are used to design the outputs and impact reports and form the basis of communicating success to our clients.

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