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Final evaluation report of the Heritage @ Huddersfield Project

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**Heritage @ Huddersfield Project  
Final evaluation report  
August 2018**



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## Executive summary

This report forms the summative evaluation for the Heritage @ Huddersfield project (R2 delivery project) funded by the Heritage Lottery Fund and University of Huddersfield and running from 2013-2017. Formative evaluation was carried out in 2015 and 2016 which contributed to the development of the project whilst running. The project aimed to create a beacon centre and Service through which the University's heritage collections would be accessible to everyone. It was anticipated that the project would secure the long term future of the collections through conservation and cataloguing, and enable new ways for audiences to learn from and engage with them. Securing the future of the collections would mean new and wider ways could be developed to engage with audiences and to interpret the collections.

The project was evaluated against its original aims and objectives, using a range of methods. Its contribution to HLF's outcomes under its 2008 Strategic Framework (in force at the time of application and during the project) is also evaluated in addition to its contribution to the strategic plans of the University of Huddersfield's archive service.

The report considers:

1. What the project aimed to achieve
  2. What actually happened? – across the detailed work areas of the project:
    - 2.1 Capital works to repair and conserve the heritage collections
    - 2.2 Capital works to create the facilities in Heritage Quay
    - 2.3 Activity Plan – adult and community learning
    - 2.4 Activity Plan – exploration and group spaces in Heritage Quay
    - 2.5 Activity Plan – online activity
    - 2.6 Activity Plan – schools activities
    - 2.7 Activity Plan – University links
    - 2.8 Activity Plan – participation, volunteering and events
    - 2.9 Activity Plan – marketing and communications
    - 2.10 Activity Plan – resource discovery
    - 2.11 Activity Plan – training and evaluation
    - 2.12 Activity Plan – using heritage collections in the research room, overall targets and digital engagement; Customer Service Excellence standards
    - 2.13 Project Management
  3. Review of outcomes overall for the project, Archive Service and HLF
  4. Sustainability
  5. Summary of lessons learned
  6. Acknowledgements
- Appendix 1 Bibliography  
Appendix 2 Digital dashboard (produced quarterly)  
Appendix 3 Summary evaluation report, Learning & Engagement Officer  
Appendix 4 Detailed evaluation report, Participation & Engagement Officer

In each of the detailed areas within section 2 the report discusses the overall project outcome to which the area of work contributed, the project activity both intended and actual, the "logic model" underpinning the area of work, the evaluation methods employed and quantitative and qualitative evaluation data, before analysing the success of the project outcomes and the extent to which HLF's strategic outcomes were fulfilled through the project. Whilst the idea of the logic model pre-dated the project's evaluation framework, these have been used in this evaluation report to plot the outcomes the project intended to achieve and consider the project inputs, activities and outputs accordingly.

The report shows that this project was delivered on time and under budget, achieving its overall aims and objectives and exceeding the targets originally set for audience engagement and for preservation of the heritage collections. As a result of investment by HLF and the University, it is now easier for everyone, whatever their level of knowledge, to learn from and engage with the collections in ways that suit them as individuals, families or groups. This is a truly interactive service in which the heritage collections become a catalyst for creativity and a living archive, offering a lively interface between audiences and the academic community. Exciting, enticing and flexible multi-functional physical and digital facilities for learning and engagement have been created, which underpin the above areas of work. And radical improvements have been made in the conservation and management of the heritage collections so that they have a sustainable future.

External consultancy was commissioned to create an evaluation framework for the project in 2014/5. This final report has been compiled by the Project Director who recognises the inherent tension within self-evaluation between a project telling its own story to an external audience, whilst also avoiding bias. This report is therefore aimed to be a document which evaluates the project objectively and identifies openly where things did not go well and could be improved in the future. In the detailed sections it describes an evaluation process which encompassed pre-planning based on the externally commissioned evaluation framework, and triangulation of quantitative and qualitative evaluation methods and data. Input was pro-actively sought from all user groups and consideration of sample sizes and areas of bias. The project aimed to use appropriate and methodical ways of asking to provide robust evidence including coverage of well-being as well as demographic, economic and social capital issues where appropriate. The series of external awards won by the project and service provides a level of independent external challenge. So whilst some subjectivity is inevitable, the report aims to be as objective as possible throughout in evaluating the project. Many people have contributed to the project and to the report; any omissions, errors or subjectivity remaining are entirely those of the author.

M Sarah Wickham  
HLF Project Director/University Archivist & Records Manager  
August 2018

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## 1. What the project intended to achieve

### 1.1 The baseline

The round 2 application made to HLF in June 2013 described the service as below, which provides a baseline against which the project activities analysed and evaluated in §2 can be set.

In June 2011 the staff establishment of the service comprised 1.86fte: 1fte professionally-qualified University Archivist & Records Manager and 0.86fte Archives Assistants. Their responsibilities could be summarised as follows:

- organisational health activities including policy development, planning and monitoring, fundraising, management activities;
- preservation and conservation including environmental monitoring, responding to equipment failures & disasters, halting & stabilising conservation threats (eg. mould, pests);
- collections management including developing leads and acquiring additions to the collections; processing acquisitions;
- collections information and resource discovery activities including managing volunteers who support cataloguing activities;
- audiences - providing research room facilities, then available 15 hours per week; answering enquiries; providing talks, teaching sessions and exhibitions.

The University Archivist & Records Manager is also responsible for the records management service which supports the internal corporate informational and recordkeeping requirements of the University's activities, in addition to services relating to the heritage collections described above.

Members of the local community, students and academics (from other institutions as well as the University of Huddersfield) accessed the collections in person in the search room and through enquiry services. In 2011/2 278 users accessed the collections and 440 enquiries were answered.

Activities included regular talks, exhibitions, classes and workshops and there were generally at least four volunteers working in the service each year, the majority being student work placements. In 2011/2 the Service held 12 events enjoyed by 163 participants; all of these were internal to the University. 5 individual volunteers contributed the equivalent of 0.1fte over the year.

Accommodation for users to access the collections was in areas of the University Library shared with its (chiefly undergraduate) users: approximately 61 square metres (m<sup>2</sup>) for individual researchers and 47 m<sup>2</sup> for groups. Audience consultation showed that many potential users are deterred by the current location. The heritage collections were housed in some 260m<sup>2</sup> of storage space spread across 9 individual locations and 3 floors; none of these spaces met the standards outlined in PD5454:2012 "Guide for the storage and exhibition of archival materials" which presented a range of direct threats to the survival of the collections. The Service was unable to take in new collections of any size.

Both the project Activity Plan and the Collections Conservation Management and Maintenance Plan developed during the stage 1 development project revealed a range of potential audiences for the heritage collections and a number of weaknesses which could not have been addressed within the Service's pre-project capacity. Whilst the staff sought to provide professional standards of care for the collections and to widen access to them, the physical environment and low levels of detailed collections information limited both capacity and effectiveness.

Key limitations to widening the audiences for the heritage collections included:

- a high amount of manual intervention by staff required for even very basic management of the collections.
- users were significantly limited to students, academics and serious specialist researchers.
- users reached the service through a specific recommendation as the service could not actively seek users due to limitations of staff capacity.
- provision for users was significantly limited by the poor collections information, in many cases a lack of any catalogue. As a result each visit required high levels of support by staff.
- The service was inefficient due to the low level of consistent information about the collections which led to repeat work when seeking to help users.
- Low levels of collections information, space and staffing limited work to interpret collections, promote use and provide new means to engage with the collections including through links with wider communities and with University courses.
- partnerships were ad hoc and project based, drawn from a limited range of partners; the service was unable to be proactive in seeking partnerships due to capacity limitations.
- Barriers to access as a result of the Service's previous location within the security envelope of the University Library; dedicated facilities for a range of methods of access were lacking.

Principal risks to the conservation of the heritage could be summarised as:

- Inadequate packaging to protect individual items.
- High proportion of 19th and 20th century material with acidic qualities.
- Inappropriate building environment which fell far short of PD5454.
- Past experience of mould growth.
- Very poor quality catalogues, with serious implications for security and management of collections, as well as for access by users.
- No facilities for accessing digital resources or listening to music collections.
- Lack of space prohibited new collecting so collections fail to develop and retain their relevance and breadth.
- Inability to develop new storage accommodation meaning collections could undoubtedly rapidly deteriorate because of the high temperatures.
- Inability to develop new audiences, meaning audiences could not be accommodated or engaged and Service becomes irrelevant.

Further details including statistics, benchmarking and other information can be found in the Collections Conservation Management and Maintenance Plan (March 2013).

## 1.2 The project objectives

At the outset the Heritage @ Huddersfield stage 2 delivery project was intended to create a beacon centre and Service through which the University's heritage collections would be accessible to everyone. It was anticipated that the project would secure the long term future of the collections through conservation and cataloguing, and enable new ways for audiences to learn from and engage with them. Securing the future of the collections would mean new and wider ways to engage with audiences and to interpret the collections could be developed.

The project set out to deliver:

- learning and activity programmes enabling people to enjoy and learn about the heritage collections
- a range of participation opportunities for people to engage more directly with the preservation, interpretation, cataloguing and gathering of the collections
- new dedicated specialist facilities for people to interact with the collections and one another in a wide range of ways
- new means and information for collections access

- conservation of collections through new specialist storage facilities and supporting preservation activities.

The project had the following high level objectives:

1. To make it easier for everyone, whatever their level of knowledge, to learn from and engage with the collections in ways that suit them as individuals, families or groups.
2. To be a truly interactive service in which the heritage collections become a catalyst for creativity and a living archive, offering a lively interface between our audiences and the academic community.
3. To create exciting, enticing and flexible multi - functional physical and digital facilities for learning and engagement.
4. To make radical improvements in the conservation and management of the heritage collections so that they have a sustainable future.

These objectives were to be fulfilled through the following workpackages:

- Collections conservation management & maintenance, with a total budget of £75,709;
- New building work/design, total budget £1,404,087;
- Activity, learning and engagement, total budget £367,917;
- Resource discovery/collections intellectual access, total budget £99,132.

These workpackages were supported by project management activities, with a total budget of £85,925.

## 2. What actually happened?

The four main workpackages of the project comprised: works to repair and conserve the heritage collections (described in the project Collections Management and Maintenance Plan); capital works to create the facilities in Heritage Quay (RIBA stage documentation); activity, learning and engagement, and resource discovery/collections intellectual access (both presented in the project Activity Plan). The Activity Plan encompassed nine key areas: adult and community learning; exploration and group spaces; online activity; schools activities; University links; participation, volunteering and events; marketing and communications; resource discovery; training and evaluation.

These areas of work are discussed in detail below. Each detailed section reflects on the overall project outcome(s) addressed by the area of work, the intended and actual project activity, the logic model applied, evaluation methods used and data collected, analysis and mapping to the outcomes of HLF's Strategic Framework.<sup>1</sup>

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<sup>1</sup> The project was funded under the Heritage Grants programme in 2012 under HLF's strategic framework [Valuing our heritage, investing in our future: Our strategy 2008-2013](#)

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## 2.1 Capital works to repair and conserve the heritage collections

### 2.1.1 Overall project outcome

4. To make radical improvements in the conservation and management of the heritage collections so that they have a sustainable future.

### 2.1.2 Intended project activity

The Collections Conservation Management and Maintenance Plan (2013) provided an understanding of the baseline of the physical condition of the heritage collections, and provided structured advice and costed action plans on how to care for these collections in the future to meet professional archival standards and best practice and enable access for a wide audience. The chief areas of work outside the improvement in the storage environment (discussed in §2.2 below) were improvements to packaging across the heritage collections, the conservation treatment of the most badly affected analogue items and the digitisation of priority obsolete formats (eg. Betamax). A Preservation Assessment Survey was planned for the end of the project, both to chart progress and also to plan and budget for future work in this area.

### 2.1.3 Actual project activity

Activity was carried out as planned, with a large amount of preparation work in reboxing and repackaging the collections undertaken during 2013 and 2014 to prepare them for the move. A tender process was held in early 2014 to appoint suppliers for conservation and digitisation work, which then resulted in this specialist work on parts of the collections taking place in stages during 2014-2017 in tandem with resource discovery work (described in §2.10 below) as staff were able to evaluate and prioritise the work. The Preservation Assessment Survey was completed in summer 2017.



### 2.1.4 Logic model

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
<p><b>Budget</b> of £67,852 (£0 contingency) £7,907 fees Expenditure of £87,366 + £7,983 fees</p> <p><b>Scheduled October 2013 – June 2017</b> Took place October 2013 – September 2017</p> <p><b>Project resources:</b> Project Director Collections Access Officer Collections Volunteers Conservation supplier Digitisation supplier Preservation Assessment Survey consultants</p> <p><b>Additional resources (not project funded)</b> Assistant Archivist &amp; Records Manager Archives Assistants</p>	<p>Collections prepared for move by staff team (reboxing) Preservation repackaging during cataloguing and whilst collections are in use – by staff and collections volunteers. Remedial conservation work by conservation supplier West Yorkshire Archive Service. Preservation digitisation work by digitisation supplier Save Photo Ltd. Establish and maintain routine housekeeping procedures including cleaning, pest and environmental monitoring. Preservation Assessment Survey by Library and Archive Surveys &amp; Sussex Conservation Consortium.</p> <p>Details of training and volunteer outputs encompassed by this work are described in the relevant areas in sections 2.8 and 2.11 below.</p>		<p><b>Short term</b> Protect material through conservation-quality packaging to reduce the rate of damage and decay. Remedy conservation problems for priority items.</p> <p><b>Medium term</b> Improve storage environment to prevent rapid deterioration or irreversible damage to heritage collections.</p> <p><b>Long term</b> Strategic and integrated approach to collections management and preservation. Sustainable strategies for collections care and conservation.</p>
<b>Assumptions</b>		<b>External factors</b>	
<p>Activities in this area will prolong the life and availability of the heritage collections for use, and in the case of preservation digitisation, enable material to be accessed which is currently inaccessible (eg. held on Betamax).</p>		<p>Resource availability – the preservation needs of the collections are always likely to outstrip the available resources, therefore prioritisation of activity within agreed parameters corresponding to best professional practice will be required.</p>	

### 2.1.5 Evaluation methods

Predominantly quantitative evaluation methods were chosen in this area, as the project baseline (summarised in the Collections Conservation Management and Maintenance Plan 2013) revealed low levels of appropriate packaging, along with high numbers of obsolete and degrading formats. Investing in the preservation and conservation of the collections could best be measured by charting the change in absolute numbers.

Qualitative measures such as the standard to which conservation, preservation digitisation and the Preservation Assessment Survey were carried out by the external suppliers were also used, by benchmarking and appointing suppliers contractually bound to produce work to the highest possible standards. Routine housekeeping regimes, which are crucial in lowering the risk to heritage collections (eg. from pest and mould infestations), were also measured qualitatively against the widely accepted Collections' Trust *Benchmarks in Collections Care 2.0* (2011), based on PAS 197: Code of Practice for Cultural Collections Management.<sup>2</sup>

During the project the service applied for Archive Service Accreditation in addition to undertaking formative evaluation during the project, submitted to HLF in autumn 2015 and autumn 2016. Archive Service Accreditation is the UK standard for the 2000+ archive services in all sectors, and defines good practice and identifies agreed professional standards. This UK-wide quality standard offers a benchmark for gauging performance and recognising achievements and is awarded by the UK Archive Service Accreditation Committee; the scheme was launched in June 2013 and on award of Accreditation in March 2016 Heritage Quay became one of only 46 Accredited Archive Services. The Accreditation Standard encompasses extensive reporting and analysis in the "Collections" section on collections care and management.

### 2.1.6 Evaluation data

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
AP50A. Develop & implement housekeeping regimes	Quantitative	Housekeeping regime in place and is completed as planned	LI	n/a	yes	yes	yes	MET
	Qualitative	Housekeeping regime meets standards in Benchmarks for collections care	LI	n/a	yes	yes	yes	MET
AP50B. Boxing of unboxed/unsuitably boxed material	Quantitative	100% legacy archival collections boxed	LI	100%	n/a	n/a	n/a	MET

<sup>2</sup> <http://collectionstrust.org.uk/resource/benchmarks-in-collections-care-2-0/>

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
AP50B. Rolling annual programme of box replacement where required & expansion of overfilled boxes from Aug 2014 onwards	Quantitative	150 boxes annually from year 1 onwards	LI	n/a	1276	223	465	EXCEEDED BY 1,514
AP50B. Plastic photographic and magnetic media repackaging programme (ongoing)	Quantitative	2000 items in year 2, 750 in year 3	LI	n/a	1650	987	1225	EXCEEDED BY 1,112
AP50B. Develop procedures for the insertion of individual items into sleeves and folders conforming to PD5454/BS4971 which are integrated into accession, cataloguing, copying and reading room procedures so that over time this protection is introduced for all items.	Quantitative	500 items annually	LI	n/a	990	715	748	EXCEEDED BY 953
	Qualitative	procedures developed & embedded	LI	n/a	no	no	yes	MET
AP50C. Fundraising for systematic conservation programmes for prioritised & strategically important collections	Quantitative	1 bid submitted p/a	SW	n/a	0	1	1	MET
AP50C. Remedial conservation treatment of individual items: Copy for use, package to support/protect	Quantitative	150 items 2013/14; year 1 125 items; year 2 100 items; year 3 25 items	SW	47	7877	8716	47	EXCEEDED BY 16,278
AP50C. Targeted Preservation Assessment Survey	Quantitative	survey completed by July 2017	SW	n/a	n/a	n/a	yes	MET

### 2.1.7 Analysis

From the data above it can be seen that all the targets set were significantly exceeded or met, and that in purely quantitative terms a transformation has been made in the ongoing preservation of the heritage through basic and remedial methods. Whilst boxing and repackaging are not “glamorous”, or particularly expensive, this is the single most significant change. The Preservation Assessment Survey (summer 2017) revealed that “The preservation risk profile of the Heritage Quay material is different from that of the UK aggregate figure, with a higher proportion of the collection falling into the low (PPB2) Preservation Priority Band. This profile is produced by the presence of most key preservation measures which minimise risk and protect the collection.” 82.1% of the material at Heritage Quay now falls into the lowest Preservation Priority Bands, as compared with the UK aggregate figure of 59%. Using another measure, that of surface dirt, 26.4% of the collection sample recorded is affected - better than the UK aggregate figure (50%)

Whilst the repackaging and other associated work carried out largely by the Archives Assistants and Collections Volunteers was not evaluated specifically for quality, it was felt that the existing review processes covered this qualitative evaluation effectively and that to evaluate this one area of their work was

disproportionate. Both Archives Assistants have monthly 1:1s with their line manager, as well as an annual appraisal and 6-monthly review. Of the four individuals in post (1 occupying one post during 2013-2017, 3 occupying the other post during this period), 3 undertook specific relevant training during the project period.

All volunteers covered repackaging in their induction, as a completely new skill area, and observation reveals good levels of manual handling and repackaging skills in action over the course of their work. Specific outcomes for volunteers are discussed in section 2.10 below, as this section focusses on the work to the collections.

The Preservation Assessment Survey, carried out by specialist contractors to the highest professional standards, highlights further improvements to the preservation management of the collections and makes recommendations for short, medium and longer term actions which the service will be able to continue to implement into the future, in particular using the remaining stocks of archival quality boxes and folders purchased with project funding.

### 2.1.8 HLF outcomes

<b>HLF's outcomes for Heritage</b>	<b>HLF's outcomes for People</b>	<b>HLF's outcomes for Communities</b>
<b>Heritage will be better managed</b>	<b>People will have learnt about heritage</b>	With HLF investment, environmental impacts will be reduced
<b>Heritage will be in better condition</b>	<b>People will have developed skills</b>	More people and a wider range of people will have engaged with heritage
Heritage will be better interpreted and explained	<b>People will have changed their attitudes and/or behaviour</b>	The local economy will be boosted
<b>Heritage will be identified/recorded</b>	People will have had an enjoyable experience	The local area/community will be a better place to live, work or visit
	<b>People will have volunteered time</b>	<b>The funded organisation will be more resilient</b>

## 2.2 Capital works to create the facilities in Heritage Quay

### 2.2.1 Overall project outcomes

3. To create exciting, enticing and flexible multi - functional physical and digital facilities for learning and engagement.
4. To make radical improvements in the conservation and management of the heritage collections so that they have a sustainable future.

### 2.2.2 Intended project activity

The design of the facilities for audiences and collections was seen as fundamental to achieving the R2 Activity and the Conservation Management and Maintenance Plans. The main areas of work planned were

- Dedicated and direct public access signposted through the town centre and within campus from the University Plaza.
- Dedicated and multi-functional public spaces for exploration of the changing exhibition programme, for visits by groups and for a range of programmed events.

The following key principles were followed in designing the multimedia and exhibition aspects of the exploration space:

- Engage – to use new technology to engage new and existing audiences with heritage, based on the collections’ roots in the heritage and cultural traditions of Huddersfield and its hinterland.
  - Experience – to create a world class experiential space that literally stops visitors in their tracks, fully immersing them in the richness of the heritage collections.
  - Interact – to provide pathways into the rich diversity of the heritage collections. To help visitors find a personal entry point and provide an inspirational interaction with the content.
  - Access – to enable visitors to connect and engage with the heritage collections through the broadest possible access, whether it be physical, intellectual, cultural or through different points of entry.
  - Futureproof – to facilitate future growth of the collections, enable a broad use of the project facilities, and support future development of the project.
- Dedicated public research room and listening rooms for those visitors who wish to undertake extensive research or practice and work on-site on specific items from the heritage collections, perhaps for an extended period of days.
  - Office workrooms for staff and volunteers including secure collections reception.
  - High-density repositories for the conservation of the heritage collections. For the first time the collections will be housed appropriately in conditions meeting PD5454:2012 “Guide for the storage and exhibition of archival materials”.

### 2.2.3 Actual project activity

The capital works programme achieved the creation of all these physical facilities:

Group space (eg. lectures, workshops; also contains the interactive gesture wall)

<https://www.youtube.com/watch?v=xf07sHKAXTs> for an overview



Quiet research space and listening/viewing facilities including equipment to digitize obsolete formats (eg. audio & video cassettes, vinyl) on demand



State of the art repositories for the collections



## 2.2.4 Logic model

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
<p><b>Budget</b> of £1,189,112 building work, £139,479 equipment and materials, and £75,496 fees (£56,828 contingency) Expenditure of £1,078,660 + £145,034 + £100,787 fees No contingencies used</p> <p><b>Scheduled October 2013 – September 2014</b> Took place October 2013 – April 2015</p> <p><b>Project resources:</b> Project Architect Structural Engineer CDMC/Principal Designer M&amp;E consultant Quantity Surveyor Multimedia consultant Project Director</p> <p><b>Additional resources (not project funded)</b> £479,098 budget for additional fees and refurbishment works in association with main project (corridor, toilets)</p>	<p>630m<sup>2</sup> facility created by refurbishing the existing building, including multimedia and exhibition cases installed to facilitate interpretation, learning and engagement. Furniture and equipment throughout the facility enable the work of the rest of the project to take place.</p> <p>Adjustments (eg. acoustic work, additional equipment and furniture) made over the course of the project based on customer feedback and observation of the spaces in use.</p> <p>Details of events, attendees and other outputs enabled by the facilities are described in the relevant areas in sections 2.3 – 2.13 below.</p>		<p><b>Short term</b> Awareness of the facility and its offer. Motivation to visit and experience innovative multimedia. Enjoyment. Engage &amp; inspire people to interact with the collections in a range of ways.</p> <p><b>Medium term</b> Continued interaction with collections and with other people through interest. Flexible spaces enabling new ways and means of access and engagement. Use of the facility as social space. Expansion space to enable collecting to resume. Safeguard collections physically. Develop service offer and profile.</p> <p><b>Long term</b> Sustainable accommodation for users, staff and heritage collections. Minimise cost of maintenance and repair to fabric. Minimise need for conservation intervention on paper and paper-based formats within the heritage collections.</p>
<b>Assumptions</b>		<b>External factors</b>	
Facilities will provide the environment to enable other aspects of the project work.		Ongoing development of University campus.	

### 2.2.5 Evaluation methods

Predominantly quantitative evaluation methods were chosen in this area, as the project baseline (summarised in the Collections Conservation Management and Maintenance Plan 2013) revealed the high impact of the poor repository and storage conditions on the heritage collections.

As a one-off activity, the construction sub-project could be qualitatively measured by considering activities such as the procurement processes; however this was not felt to be beneficial within the project evaluation overall since the requirements for procurement (as described in the Project Management Plan 2013) had to conform with the University of Huddersfield *Procurement Manual* and *Financial Regulations* and/or the Heritage Lottery Fund *Managing Your Grant*, whichever was the more stringent for the services or goods being procured. These are subject to normal audit procedures.

The construction and multimedia contracts themselves included specification for materials, such as the composition of resin floors and cement mixtures in construction, and hardware and software requirements in multimedia, and the contractual quality management procedures effectively evaluated the supply and construction of these elements.

The parent department of the archive service, Computing & Library Services, is committed to Customer Service Excellence (CSE) as a service improvement and development tool. As part of CSE standards for customer service are set and monitored; these include the standard “We will provide a welcoming, inspiring and safe environment” which is monitored quarterly using a range of measures including customer feedback.

Heritage Quay also maintains a profile on TripAdvisor, the “World's Largest Travel Site. 500 million+ unbiased traveller reviews.” These reviews are monitored and the team give a response. Whilst a small number of reviews have been posted, these are unsolicited and are therefore felt to reflect genuine feedback.

During the project the service applied for Archive Service Accreditation in addition to undertaking formative evaluation during the project, submitted to HLF in autumn 2015 and autumn 2016. Archive Service Accreditation is the UK standard for the 2000+ archive services in all sectors, and defines good practice and identifies agreed professional standards. This UK-wide quality standard offers a benchmark for gauging performance and recognising achievements and is awarded by the UK Archive Service Accreditation Committee; the scheme was launched in June 2013 and on award of Accreditation in March 2016 Heritage Quay became one of only 46 Accredited Archive Services.

Heritage Quay won The Guardian Higher Education Award for “Inspiring Building” (March 2016) and SCONUL’s “Library design – small” category (December 2016), and the multimedia facilities were Highly Commended in CILIP’s Alan Ball awards (December 2015). These judgements in prestigious and competitive national awards can be used as an objective indicator of the quality and success of the facilities created through the capital works. Similarly, the Assessor for Customer Service Excellence full accreditation in April 2017 awarded three “compliance pluses” for the Heritage Quay multimedia, recognising “exceptional practice that goes above and beyond”, innovation and exceeding industry practices and standards measured through benchmarking.

## 2.2.6 Evaluation data

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
AP50A. Create PD5454:2012 compliant environment	Quantitative	Facility is open and conforms to norms (overlap with monitor & evaluate measure)	SW	n/a	yes	n/a	n/a	MET
AP50A. Monitor & evaluate results of regular environmental monitoring	Quantitative	Compliance with PD5454:2012 recommendations 95% of period collections in store	LI	n/a	no	yes	yes	MET

For the public spaces, monitoring of the Customer Service Excellence standard “We will provide a welcoming, inspiring and safe environment” during the three years Heritage Quay has been open shows that the standard was met. TripAdvisor gives Heritage Quay a 5-star rating.

**Sample customer comments, May-Aug 2017**

Nice place/ atmosphere to absorb the fascinating archive material. Thank you for a lovely visit.'

Surroundings very congenial for studying documents.

Good facilities in search room, especially lighting - v. good for taking photos. And grateful for a cool atmosphere on a v. hot day!

'Very friendly staff, comfortable consultation room and very useful archives. Thank you!!'

Heritage Quay's bright challenging interior, with well mounted themed displays and the interactive 'curvey screen' clearly make for greater use, sampling and interpretation of your vast archival collections.

### Heritage Quay

5.0 12 Reviews | #27 of 50 things to do in Huddersfield | Points of Interest & Landmarks, Sights & Landmarks  
 Queensgate | Queensgate, Huddersfield HD1 3DH, E... | +44 1484 473168 | Website | Fax

#### Review Highlights

- "Excellent place"**  
 Excellent place in Huddersfield to visit. They have a range of public events (music, history, sport... [read more](#)
- 5.0 Reviewed 22 January 2017  
 MargieDemi, Huddersfield, United Kingdom
- "Fantastic show in beautiful surroundings"**  
 Visit to see Micron Theatre doing Canaries. Clean warm comfortable theatre area with nice... [read more](#)
- 5.0 Reviewed 20 October 2016  
 Laurence J, Holmfirth, United Kingdom



## 2.2.7 Analysis

In common with many new buildings, a period of occupancy and usage has resulted in some changes following handover from the contractors. Further furniture was purchased for the public areas and amendments to the acoustics in the group space were made following customer feedback and observations of the space in use. In the repository areas, the small repository which was originally planned to house freezers was subsequently fitted with rolling shelving as the work on the heritage collections revealed greater efficiencies could be made in the more effective storage of printed books prioritised

over the resource intensive requirements for wrapping and preparing photographic materials for freezing. Whilst freezing is considered to be the optimum storage for certain photographic materials, storage in a general repository environment is acceptable.

As with most new repositories, the specialist environment took some time to stabilise and there have been periods where integration with the main building management system covering the rest of the Schwann Building resulted in the repository environment going beyond the parameters set for temperature and relative humidity on occasion. Ongoing staff changes at the supplier of the multimedia hardware and a lack of detailed documentation meant that the multimedia was more resource-intensive to maintain than had originally been anticipated. Capacity to undertake more specialist and pro-active contract management would have saved resource in other areas.

Overall it was found that the provision of good space has been fundamental in delivering the other capital and revenue elements of the project, as seen in the Staff/Space/Collections Dependency Model developed in research on capital investment in archive services (2012).<sup>3</sup> ‘At the heart of a good service are three elements: a relevant collection; appropriate types and levels of staff; and appropriately designed and sufficient space. These three resources come together – in the best cases – to maximise benefit to all stakeholders. The provision of good space is a fundamental asset of a successful service’. In particular the changes to the research room achieved through the creation of Heritage Quay have enabled a more efficient and effective provision of services to individual researchers by guaranteeing opening days and times for the research room, as well as significantly improving the security of the collections and the customer experience. The long opening hours of the Group Space and exhibition, 73.5 hours per week, significantly improve self-guided access to the collections. A clear brand and identity (see §2.9 below), and associated signage across the University campus, has significantly improved the experience of visitors external to the University.

### 2.2.8 HLF outcomes

HLF's outcomes for Heritage	HLF's outcomes for People	HLF's outcomes for Communities
<b>Heritage will be better managed</b>	<b>People will have learnt about heritage</b>	With HLF investment, environmental impacts will be reduced
<b>Heritage will be in better condition</b>	People will have developed skills	More people and a wider range of people will have engaged with heritage
<b>Heritage will be better interpreted and explained</b>	People will have changed their attitudes and/or behaviour	<b>The local economy will be boosted</b>
<b>Heritage will be identified/recorded</b>	People will have had an enjoyable experience	The local area/community will be a better place to live, work or visit
	People will have volunteered time	<b>The funded organisation will be more resilient</b>

<sup>3</sup> E Oxborrow-Cowan for Archives & Records Association “Research Into The Benefits Of Capital Investment In Archives” (2012) available from <http://www.elizabethoc.co.uk/research/>

## **2.3 Activity plan 1-8 review Activity Plan, appoint Participation & Engagement officer; Adult and Community Learning**

### **2.3.1 Overall project outcomes**

1. To make it easier for everyone, whatever their level of knowledge, to learn from and engage with the collections in ways that suit them as individuals, families or groups.
2. To be a truly interactive service in which the heritage collections become a catalyst for creativity and a living archive, offering a lively interface between our audiences and the academic community.

### **2.3.2 Intended project activity**

The Activity Plan presented a strategy responding to the scale of the challenge to raise awareness and increase access to the heritage collections whilst acknowledging the scope of opportunity that the internationally significant collections provide. The process generated a large number of diverse ideas and illustrated a wide number of opportunities for activities which would enable greater awareness of and engagement with the collections at a range of levels. It prioritised 9 key areas of activity that would increase the capacity of the Service to deliver enhanced quality core services, build relationships with networks of potential new audiences and enhance the heritage collections to attract new audiences and develop new means of engagement. The Activity Table detailed the activities to be carried out (listed below in §2.3.6 as part of the evaluation data).

It was anticipated that the Participation and Engagement officer would lead on the development of community and adult learning programmes and resources. Partnership was seen as essential to the development of adult and community learning for the project. The project aimed to work through other learning providers and community organisations to build links to local communities and to access the expertise of these organisations in working with communities to best support their needs and interests. In particular, work was planned with the Kirklees Adult and Community Learning Team to integrate the project into local plans and priorities for adult and community learning. This partnership approach would help the Service diversify the profile of its users but also better understand the needs of local communities.

A focus of this area of work was seen as integrating the project's programme into the work of other adult learning providers to provide training, resources and activities to enhance existing provision. There was an overwhelmingly enthusiastic response from adult learning providers during the consultation for the Activity Plan about the project. They felt the collections could greatly enhance their courses, provide students with original source materials to research, to help their students develop skills, to provide alternative and inspirational learning environments and to support their students' progression routes particularly to the University. The project intended to work with the network of adult learning providers in Kirklees and develop opportunities to use the collections, involving a wide range of activity: using the heritage collections as inspiration for art projects, providing source materials and supporting historical enquiry skills of history students, providing inspirational materials and topics to skills for life courses. It was anticipated that linking with adult learning provision would involve: training and awareness raising for adult learning tutors; workshops and events linked to courses; development of resources that tutors could use, and outreach.

The project planned to work with the University Community Development department to gain their expertise but also to raise awareness amongst students of the potential of the Service to support their work. Training would be given to students and they would be encouraged to use and develop learning resources and projects using the heritage collections during their placements.

A programme of events, workshops and courses were to be developed which would link to national learning campaigns including: Adult Learners week; family learning week; History week.

### ***Who formed the audience?***

Adult learners, family learning groups and adult learning tutors, who would work directly with adult learners.

### ***What were the aims?***

- Increasing awareness of the University and raising aspirations.
- Using the heritage collections to support the creation of resources.
- Making adult tutors more aware of the service and heritage collections.
- Supporting specialist courses (examples given were Skills for Life and Music in Mind.)



Radiophonic Workshop



Conducting for Beginners



Music in Motion



HRS: Curation

### **2.3.3 Actual project activity**

The informal adult learning programme was split into three types of activity: skills, history and creative, broadly linked to the participation themes of local history, music and rugby league. 14 courses and 32 workshops were run during the lifetime of the project on a range of themes, and hosted at Heritage Quay.

The partnership adult learning activities envisaged partnering with adult learning providers across Kirklees following the activity plan consultation period, where a strong interest had been expressed for links to adult learning providers, in partnership with the University's Schools and Colleges Liaison service.

However, the adult learning landscape in Kirklees had changed dramatically in the period since the Activity Plan had been published (March 2013), with much of the local authority's capacity reduced in this area. The Schools and Colleges Liaison Service team had also changed direction in the intervening period. Despite attendance at several local authority partnership meetings (including one hosted at Heritage Quay), the Participation & Engagement Officer was unable to find potential partners able to work together. Some activity was undertaken in partnership with the Workers' Educational Association, which resulted in a total of 58 learners engaging with the heritage collections as part of a workshop or project. Unfortunately, the local Workers' Educational Association coordinator was not interested in historical content, so joint working was pursued through Calderdale or at a regional level.

Further details on all activities can be found in Appendix 4.

*Excellent, lively, friendly learning. Lovely to be able to try out the skills during the session – workshop attendee*

### 2.3.4 Logic model

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
<p><b>Budget</b> of £66,000 Expenditure of £55,093</p> <p><b>Scheduled June 2014 - July 2017</b> Took place February 2014 – September 2017</p> <p><b>Project resources:</b> Participation &amp; Engagement Officer</p> <p><b>Additional resources (not project funded)</b> Internal partners: Schools and Colleges Liaison Service, academics External partners: adult learning providers</p>	<p>Appointment and retention of Project Officer. Resources to support adult learning opportunities and courses.</p>	<p>A range of workshops and events leading to 1,150 learner attendances. Partnership projects to create resources and also help build links with specific communities. Training and awareness raising for adult learning tutors. Develop partnerships with Kirklees Adult and Community Learning Team and other adult learning providers</p>	<p><b>Short term</b> Skills and confidence in adult tutors to use heritage resources. Learning, skills development and enjoyment for individual learners. Using the heritage collections to support the creation of resources. Making adult tutors more aware of the service and heritage collections. Alternative inspirational learning environment. Access to expertise of service and university staff. Skills and awareness of use of heritage material. Access to heritage material to support courses. Positive learning activities.</p> <p><b>Medium term</b> Increasing awareness of the University and raising aspirations. Signposting to other learning opportunities and progression routes in University. Integration of heritage resources in adult and community learning provision. Enhanced offer for adult learners. “Skills for Life” outcomes ie literacy, self confidence, employability skills. Volunteering opportunities for adult learners.</p> <p><b>Long term</b> Partnerships with local authority team and local learning providers.</p>

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
			Integration of the collections into strategy and plans for adult learning. More diverse socio economic profile users. Increased use of heritage by local community. Increased understanding of community needs by the archive service.
<b>Assumptions</b>		<b>External factors</b>	
<p>Activity will provide new and improved methods of engagement for those interested in the subjects covered.</p> <p>Activity will provide an inspiring entry point for those new to the subject and those new to heritage collections, including interpretation of the collections and the subjects they cover.</p> <p>Activity will be interactive, with people contributing to and exploring “a living archive”.</p> <p>Activity will provide an interface between the academic community and others with an interest in the subjects covered, with Heritage Quay and its programme acting as a local hub.</p> <p>Linking use of collections to existing adult learning courses, and linking events to national learning campaigns (eg. Adult Learners Week, Family Learning Week, History Week) will raise awareness of and increase understanding of relevance of heritage collections to learners’ interests.</p> <p>Creating relationships with University staff and services by working in partnership with existing adult learning providers with established relationships with local communities will help to reach non-users.</p> <p>Activity will reduce perception barriers of the University not being a place for non-members or informal learning.</p>		<p>Capacity among partners, notably the resilience of the Kirklees Adult Learning Partnership.</p> <p>Arts &amp; Creative Provision agenda within Kirklees MBC.</p> <p>Perception of archives, culture and heritage generally, including the impact of local authority funding decisions on heritage in the local area.</p> <p>Participation in archives, culture and heritage generally, benchmarked through Public Services Quality Group Survey of Visitors to British Archives and DCMS Taking Part: The National Survey of Culture, Leisure and Sport.<sup>4</sup></p> <p>Wider perception of University among the local community.</p> <p>Other activity of wider University including the Students Union in the local community.</p> <p>Developments in Higher Education policy particularly in the areas of widening participation, and in public engagement and impact with academic research, including the Research Excellence Framework.</p>	

<sup>4</sup> PSQG survey reports from 2002-2016 of on-site and remote visitors to archive services available at <http://www.archives.org.uk/publications/journal-of-the-ara-sp-1111397493.html>; Taking Part survey data from 2005 onwards available at <https://www.gov.uk/guidance/taking-part-survey>

### 2.3.5 Evaluation methods

A range of quantitative and qualitative evaluation methods were chosen for this area of work, reflecting the numerical targets set for learner attendances but also the learning and other social outcomes for individuals as well as the strategic and organisational outcomes for adult learning providers, the archive service, and the University. As feedback forms and surveys were voluntarily submitted by participants these are a self-selected set of data not without bias, but still useful to consider in combination with other evaluation mechanisms.

The parent department of the archive service, Computing & Library Services, is committed to Customer Service Excellence (CSE) as a service improvement and development tool, and has an annual review in the spring of each year with a full assessment against the CSE Standard every three years (most recently in 2017). As part of CSE standards for customer service are set and monitored; these include standards for customer satisfaction, responsiveness to customer feedback, support and services tailored to specified customer groups, and the running of the Heritage Quay events programme. These are monitored throughout the year using a range of quantitative and qualitative measures including customer feedback.

Heritage Quay also maintains a profile on TripAdvisor, the “World’s Largest Travel Site. 500 million+ unbiased traveller reviews.” These reviews are monitored and the team give a response. Whilst a small number of reviews have been posted, these are unsolicited and are therefore felt to reflect genuine feedback including on the events programme and exhibitions.

During the project the service applied for Archive Service Accreditation in addition to undertaking formative evaluation during the project, submitted to HLF in autumn 2015 and autumn 2016. Archive Service Accreditation is the UK standard for the 2000+ archive services in all sectors, and defines good practice and identifies agreed professional standards. This UK-wide quality standard offers a benchmark for gauging performance and recognising achievements and is awarded by the UK Archive Service Accreditation Committee; the scheme was launched in June 2013 and on award of Accreditation in March 2016 Heritage Quay became one of only 46 Accredited Archive Services. The Accreditation Standard encompasses extensive reporting and analysis in the “Stakeholders and their experiences” section on engagement – defined as more than simply contact with heritage collections and archive services; it also involves understanding and a sense of personal value, ownership and empowerment.

### 2.3.6 Evaluation data

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
AP1. Review Activity plan as submitted in Stage 2 when all staff are in post	Quantitative	Reviewed by Spring 2015	SW	n/a	yes	n/a	n/a	MET
AP2.Appointment of Participation and Engagement Officer	Quantitative	Appointed by target date	SW	n/a	yes	n/a	n/a	MET
	Qualitative	Remains in post during whole project	SW	n/a	Yes	Yes	Yes	MET

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
	Qualitative	Satisfactory appraisal reports	SW	n/a	Yes	Yes	Yes	MET
	Qualitative	Positive exit interview	SW	n/a	n/a	n/a	n/a	MET
AP3. Programme of workshops at Heritage Quay and outreach	Quantitative	100 adult learners per year (300 over lifetime)	DS	n/a	11	155	63	MET IN PART
	Qualitative	More diverse socio economic profile of service users.	DS	n/a				MET IN PART
	Qualitative	Awareness of university opportunities & progression routes	DS	n/a	n/a	n/a	n/a	n/a
AP4. Resources to support adult and community learning courses	Quantitative	100 adult learners per year (300 over lifetime)	DS	n/a	11	47	0	MET IN PART
	Qualitative	More diverse socio economic profile of service users	DS	n/a	0	13	0	MET IN PART
AP5. Partnership projects with adult and community learning providers.	Quantitative	One intensive project per year: 10 students per year.	DS	n/a	0	0	n/a	n/a
	Quantitative	Partnerships with adult and community learning providers (90 over lifetime)	DS	n/a	3	0	n/a	n/a
	Quantitative	Number of participants undertaking new volunteering	DS	n/a	56	4	0	MET
	Qualitative	[partner targets]	DS	n/a	n/a	1	0	MET IN PART
	Qualitative	Adult and community learning providers will benefit from the partnership by improving their offer in literacy training and improving employability for participants.	DS	n/a	n/a	n/a	n/a	n/a

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
	Qualitative	Volunteers will learn new skills	DS	n/a	yes		0	MET
	Qualitative	[partner targets]	DS	n/a	n/a	1	0	n/a
AP6. Training and awareness raising for adult learning tutors	Quantitative	10 tutors trained per year/30 over lifetime	DS	n/a	3	0	0	n/a
	Qualitative	Tutors will improve the quality of their courses through learning to use heritage resources	DS	n/a	n/a	n/a	n/a	n/a
	Qualitative	Future adult learners will benefit through improvements to courses	DS	n/a	n/a	n/a	n/a	n/a
AP7. Programmes of activity for adult learners week, family learning week.	Quantitative	200 participants/400 over lifetime (150 in years 2 & 3)	DS	n/a	0	0	n/a	n/a
	Qualitative	Adult and family learners will widen their understanding of the heritage through learning more about the history of their communities	DS	n/a	n/a	n/a	YES	MET
	Qualitative	Adult and family learners will have an enjoyable experience and make new friends/contacts	DS	n/a	n/a	n/a	yes	MET
	Qualitative	Adult and family learners will learn new skills through using the heritage resources	DS	n/a	n/a	n/a	yes	MET
AP8. Develop partnerships with Kirklees Adult and Community Learning Team and other adult learning providers.	Quantitative	Partnerships with local authority team and 10 adult learning providers	DS	n/a	0	1	n/a	n/a
	Qualitative	Higher profile for heritage collections and university service among providers	DS	n/a	n/a	n/a	n/a	n/a
	Qualitative	University and community partnerships are built or strengthened	DS	n/a	n/a	n/a	n/a	n/a
	Qualitative	Kirklees adult and community offer to learners is enhanced by use of heritage resources	DS	n/a	n/a	n/a	n/a	n/a

### 2.3.7 Analysis

The assumptions made in the logic model can be seen to have been fulfilled, in that a creative and interactive approach to learning has provided new, improved and inspiring methods of engagement and entry points to the heritage collections and the subjects they cover.

As can be seen from the data above, in the period between the consultation and research for the Activity Plan (late 2012/early 2013), and the start of this area of project activity following the opening of Heritage Quay in October 2014, the adult learning landscape in Kirklees had completely changed and so the partnerships and numbers anticipated have not been achieved. The impact of this as an external factor was noted in the logic model.

Nonetheless following the review of the Activity Plan (item AP 1) adult learning courses were run entirely in house, and largely staffed by principal project partners (Rugby League Cares, the University's Department of History, and West Yorkshire Archive Service). Overall these have been very effective, with most of the participants pleased with what they had learnt. Interestingly, only a few people attended more than one course, suggesting that different interests were served each time. The breadth of courses covered a wide range of interests including music and sound and Geographical Information Systems (GIS) but the main focus on historical skills did result in a many participants coming from the local history and heritage world. Courses were run in response to the question "what else do you want to learn" wherever possible.

Evaluation forms tailored to each session/course were completed by around 50% of workshop attendees (105/229), revealing a high impact on learning and understanding, skills development, and enjoyment. The forms reveal a smaller impact on attitudes and values, eg. feelings about the learners/others or perceptions of things. A perception of Heritage Quay and of the heritage collections providing an alternative and inspirational environment for learning, and being a place to interact with the University in a "safe" and welcoming place was seen to have developed during the project.

At the same time, wider developments in HE policy around the public engagement agenda meant that the University recognised the developing role of Heritage Quay in providing a bridge between the academic and local community. As a result of the work specifically in adult learning, several University departments trialled different approaches to their public engagement work and have been able to reach new audiences, in common with the archive service's experience in diversifying and increasing use of the collections based on an understanding of needs and wants. Partly as a result of the project work in this area, the University created and funded in summer 2017 a new role of Public Engagement Officer (1fte) based within Heritage Quay but with the remit to increase public engagement with research across the University. The individual who was the project's Participation & Engagement Officer 2014-2017 has been appointed to this new post.

More detailed evaluation and analysis of this area of work can be found in Appendix 4.

### 2.3.8 HLF outcomes

HLF's outcomes for Heritage	HLF's outcomes for People	HLF's outcomes for Communities
Heritage will be better managed	<b>People will have learnt about heritage</b>	With HLF investment, environmental impacts will be reduced
Heritage will be in better condition	<b>People will have developed skills</b>	<b>More people and a wider range of people will have engaged with heritage</b>
<b>Heritage will be better interpreted and explained</b>	People will have changed their attitudes and/or behaviour	The local economy will be boosted
<b>Heritage will be identified/recorded</b>	<b>People will have had an enjoyable experience</b>	The local area/community will be a better place to live, work or visit
	<b>People will have volunteered time</b>	The funded organisation will be more resilient

## 2.4 Activity plan 9-10 Exploration and group spaces

### 2.4.1 Overall project outcomes

1. To make it easier for everyone, whatever their level of knowledge, to learn from and engage with the collections in ways that suit them as individuals, families or groups.
2. To be a truly interactive service in which the heritage collections become a catalyst for creativity and a living archive, offering a lively interface between our audiences and the academic community.
3. To create exciting, enticing and flexible multi - functional physical and digital facilities for learning and engagement.

### 2.4.2 Intended project activity

The Activity Plan presented a strategy responding to the scale of the challenge to raise awareness and increase access to the heritage collections whilst acknowledging the scope of opportunity that the internationally significant collections provide. The process generated a large number of diverse ideas and illustrated a wide number of opportunities for activities which would enable greater awareness of and engagement with the collections at a range of levels. It prioritised 9 key areas of activity that would increase the capacity of the Service to deliver enhanced quality core services, build relationships with networks of potential new audiences and enhance the heritage collections to attract new audiences and develop new means of engagement.

As part of the Activity Plan the physical facilities of Heritage Quay, including the “group space” as a venue for events and the exhibition space were to be used proactively to support the wider outcomes of the plan, including the provision of learning journeys for visitors on particular themes or topics in the exhibition content.

#### ***Who formed the audience?***

University students, local community (individuals and groups), special interest groups (Rugby League and contemporary music) schools, adult and family learners.

#### ***What were the aims?***

- To have 5,250 exhibition visitors in the project period.
- Increase research room use.
- To focus on Rugby League and contemporary music collections.

### 2.4.3 Actual project activity

Over the course of the project nine exhibitions were mounted, roughly one per term, showcasing the eight key collections themes identified in the Collections Conservation Management & Maintenance Plan, in addition to an exhibition about local history. Exhibitions used the Service's Interpretation Strategy, and the Marketing & Branding guidelines (see §2.9 below) to ensure that interpretative content (eg. captions) was presented in an accessible way.

Curation was shared between Heritage Quay staff and external partners, strategically managed by the Participation and Engagement Officer. Different curators were chosen for each exhibition to ensure that expert and diverse viewpoints were included. Where possible a launch event was held, to generate media interest and to celebrate the involvement of external curators

Within this area of activity it was anticipated that Heritage Quay's events programme would result in visitors to the space: the relevant aspects of the programme are covered in §2.3 above (adult learning), and below in §2.6 (schools), §2.7 (University links), §2.8 (participation, volunteering and events).

What was not anticipated in the planning phases was the extent to which Heritage Quay proved extremely popular for internal and external bookers running their own events, with usage of the space far outstripping planned demand. During the course of the project Heritage Quay hosted a wide variety of other organisers' events from lectures to theatrical performances, fashion shows and conferences. This had an impact on staff time within the Heritage Quay team and resources, and required the team to hire a Student Helper to cover booked events outside of regular staff hours (with the costs covered by hire fees). For example, Huddersfield Jazz ran a complete season of events (monthly) during project year 2.

In addition to local societies holding at least one speaker meeting each, two societies moved their entire speaker programme to Heritage Quay of which one then outgrew the available space as a result of popularity with members (and now meets elsewhere on the University campus, in a much larger lecture room). Project partners Rugby League Cares, Huddersfield Contemporary Music Festival and Sound and Music also held a number of their own events in Heritage Quay, and directed others within their networks to use the space.



HLF were regular visitors, using Heritage Quay for workshops, funding surgeries and other events including a consultation workshop for “HLF 2019 Planning for the future” run by Resources for Change Ltd and Hopkins Van Mill, as part of the dialogue process through which HLF could listen to and understand the views of national Lottery players in developing HLF’s next strategic framework 2019-24.



Further details on all activities can be found in Appendix 4.

*'Think it all looks excellent, and glad to have been able to use skills from curation course earlier this year to contribute toward it [arts exhibition]. Really interesting.'* – event attendee/programming group member

#### 2.4.4 Logic model

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
<p><b>Budget</b> no direct budget; pro rata costs of salaries and capital works Ad hoc events Student Helper costs covered by hire fees</p> <p><b>Scheduled October 2014 - October 2017</b> Took place October 2014 – October 2017</p> <p><b>Project resources:</b> Participation &amp; Engagement Officer Collections Access Officer Project Director</p> <p><b>Additional resources (not project funded)</b> Assistant Archivist Collections Volunteers Computing &amp; Library Services administration team Internal partners: Schools and Colleges Liaison Service, academics External partners Members of the public</p>	<p>Exhibitions and supporting content.</p>	<p>Exhibition curation opportunities. Launch events. General exhibition visitors: 5,250</p>	<p><b>Short term</b> Visitors will learn/understand the development of contemporary music/rugby league/local history as illustrated by the collections; visitors will develop skills in using historical evidence. Visitors will enjoy alternative inspirational learning environment. Making people more aware of the service and its heritage collections. Access to expertise of service and university staff.</p> <p><b>Medium term</b> Visitors will think they can use the collections to find out about the past and present; can make connections between past and present; heritage collections are relevant to their life; will know how to find out more. Visitors will feel an emotional connection to the collections and the stories they tell, and be moved, surprised and inspired. Visitors will discover things they didn't know, contribute to the collections and programme, volunteer, use the interactives in the exhibitions, use the research room, and attend other events. Staff will discover and learn more about the heritage collections and the stories they tell. Increased profile of Heritage Quay, heritage collections and archive service.</p> <p><b>Long term</b> More diverse socio economic profile of service users. Increased use of service by local community and University members. Service will better understand community needs. More resilient service.</p>

Assumptions	External factors
<p>Activity will provide new and improved methods of engagement for those interested in the subjects covered.</p> <p>Activity will provide an inspiring entry point for those new to the subject and those new to archives, including interpretation of the heritage collections and the subjects they cover.</p> <p>Activity will be interactive, with people contributing to and exploring “a living archive”.</p> <p>Activity will provide an interface between the academic community and others with an interest in the subjects covered, with Heritage Quay and its programme acting as a local hub.</p> <p>Activity will reduce perception barriers of the University not being a place for non-members or informal learning.</p>	<p>Arts &amp; Creative Provision agenda within Kirklees MBC.</p> <p>Perception of archives, culture and heritage generally, including the impact of local authority funding decisions on heritage in the local area.</p> <p>Participation in archives, culture and heritage generally, benchmarked through Public Services Quality Group Survey of Visitors to British Archives and DCMS Taking Part: The National Survey of Culture, Leisure and Sport.<sup>5</sup></p> <p>Wider perception of University among the local community.</p> <p>Other activity of wider University including the Students Union in the local community.</p> <p>Developments in Higher Education policy particularly in the areas of widening participation, and in public engagement and impact with academic research, including the Research Excellence Framework.</p>

#### 2.4.5 Evaluation methods

A range of quantitative and qualitative evaluation methods were chosen for this area of work, reflecting the numerical targets set for visitor attendances and events, but also the learning and other social outcomes for individuals as well as the strategic and organisational outcomes for adult learning provides, the archive service, and the University. As feedback forms and surveys were voluntarily submitted by participants these are a self-selected set of data not without bias, but still useful to consider in combination with other evaluation mechanisms.

The parent department of the archive service, Computing & Library Services, is committed to Customer Service Excellence (CSE) as a service improvement and development tool, and has an annual review in the spring of each year with a full assessment against the CSE Standard every three years (most recently in 2017). As part of CSE standards for customer service are set and monitored; these include standards for customer satisfaction, responsiveness to customer feedback, support and services tailored to specified customer groups, and the running of the Heritage Quay events programme. These are monitored throughout the year using a range of quantitative and qualitative measures including customer feedback.

Heritage Quay also maintains a profile on TripAdvisor, the “World's Largest Travel Site. 500 million+ unbiased traveller reviews.” These reviews are monitored and the team give a response. Whilst a small number of reviews have been posted, these are unsolicited and are therefore felt to reflect genuine feedback including on the events programme within the space, and on the exhibitions which are an integral part of the space.

<sup>5</sup> PSQG survey reports from 2002-2016 of on-site and remote visitors to archive services available at <http://www.archives.org.uk/publications/journal-of-the-ara-sp-1111397493.html>; Taking Part survey data from 2005 onwards available at <https://www.gov.uk/guidance/taking-part-survey>

During the project the service applied for Archive Service Accreditation in addition to undertaking formative evaluation during the project, submitted to HLF in autumn 2015 and autumn 2016. Archive Service Accreditation is the UK standard for the 2000+ archive services in all sectors, and defines good practice and identifies agreed professional standards. This UK-wide quality standard offers a benchmark for gauging performance and recognising achievements and is awarded by the UK Archive Service Accreditation Committee; the scheme was launched in June 2013 and on award of Accreditation in March 2016 Heritage Quay became one of only 46 Accredited Archive Services. The Accreditation Standard encompasses extensive reporting and analysis in the “Stakeholders and their experiences” section on engagement – defined as more than simply contact with archives and archive services; it also involves understanding and a sense of personal value, ownership and empowerment.

#### 2.4.6 Evaluation data

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
The exhibition content will provide learning journeys for visitors on particular themes or topics i.e. local history, music, rugby.	Quantitative	5250 general visitors over life of project	SW	n/a	1365	1750	1750	MET
	Quantitative	Increased use of search room as a result of visits	SW	n/a	n/a	n/a	n/a	n/a
	Qualitative	Positive feedback from visitors.	SW	n/a	yes	yes	yes	MET
	Qualitative	Visitors will learn about the contemporary music and Rugby League from the collections	SW	n/a	yes	yes	n/a	MET
	Qualitative	Visitors will learn and improve their understanding of the heritage through learning more about their communities from the collections	SW	n/a	n/a	yes	yes	MET
	Qualitative	Visitors will learn new skills in using historical evidence and in using the collections	SW	n/a	n/a	n/a	n/a	n/a
	Qualitative	Visitors will be able to find out more about the past and present and make connections between them	SW	n/a	n/a	yes	yes	MET

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
	Qualitative	Visitors will make connections between the past as represented in the collections and their own lives	SW	n/a	n/a	yes	yes	MET
	Qualitative	Visitors will feel an emotional connection to the stories they tell, be surprised, moved and inspired and want to find out more	SW	n/a	n/a	yes	yes	MET
	Qualitative	Visitors will discover more, contribute to the collections, use the research room and come to other service events and activities	SW	n/a	yes	yes	yes	MET
	Qualitative	Establishment of social media for each exhibition	SW	n/a	n/a	yes but not coherent campaign	no	NOT MET
The group space will be inspiring and provide the right equipment	Quantitative	[All targets in: schools workshop programme + adult learning]	DS/TW	n/a	Counted elsewhere	Counted elsewhere	Counted elsewhere	n/a
	Quantitative	Number of activities booked by others in space each year	DS/TW	n/a	130	153	191	EXCEEDED
	Quantitative	Numbers of participants in activities booked by others	DS/TW	n/a	4200	5310	5983	EXCEEDED
	Qualitative	School pupils and adult learners will be inspired by the group space	DS/TW	n/a	yes	yes	yes	MET

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
	Qualitative	School pupils and adult learners will learn and improve their understanding of the heritage through using the group space IT resources	DS/TW	n/a	yes	yes	yes	MET
	Qualitative	Group leaders will feel the group has had an enjoyable learning experience and wish to return with new groups in future	DS/TW	n/a	yes	yes	yes	MET
	Qualitative	[Other targets in: schools workshop programme + adult learning]	DS/TW	n/a	Counted elsewhere	Counted elsewhere	Counted elsewhere	n/a

#### 2.4.7 Analysis

The assumptions made in the logic model can be seen to have been fulfilled, in that high quality facilities and the exhibition programme has provided new, improved and inspiring methods of engagement and entry points to the heritage collections and the subjects they cover.

Heritage Quay was seen as a prestige space, which was also easy to book - and for external groups, low cost. Both Huddersfield & District Archaeological Society and the Huddersfield Local History Society moved their monthly speaker meetings series to Heritage Quay in the opening year; the Local History Society then outgrew Heritage Quay as a result of additional membership and renewed popularity in attending meetings, and moved to a bigger lecture theatre elsewhere on campus (HDAS continues to meet monthly at Heritage Quay). Other frequent users came from the University's School of Music, Humanities and Media but also with the Schools and Colleges Liaison Service for visits by schools (both from within Kirklees and further afield) to campus. The School of Human and Health Sciences, the Vice Chancellors' office (including for a Royal visit) and Computing and Library Services were also very regular users. Welcoming so many people into the space from beyond the "heritage" community undoubtedly had a positive impact on other elements of the project. It raised awareness of the service and the heritage collections, and many contacts were made through bookers or attenders at these events who then contributed to other activities.

Event attendees have not been included in the "general exhibition visitor" numbers above: whilst general exhibition visitors could not be counted accurately throughout the three years of Heritage Quay's opening (because an automatic counter on the door would double-count staff, event attendees and all access to Heritage Quay other than by exhibition visitors), spot-checking during CSE sample weeks and verification of numbers via viewing CCTV

footage of the space triangulates the average daily figures for exhibition visitors. During periods of extensive building work on the campus, and in the run up to examinations, the Heritage Quay space was used as a general study space by many students, who also were observed visiting the exhibition and using the multimedia facilities (as well as charging their devices!).

Although this was originally planned in the evaluation strategy, progression from the exhibition to the research room was not formally tracked, as this was felt to be unnecessarily intrusive of people pursuing their own research agenda in the research room where they have limited time and are focused on their research and examining the heritage collections for this purpose. However anecdotal evidence from customer comments suggests that a small number of personal researchers discovered new or additional material or topics from the exhibitions, or had specifically come to pursue their own research as a result of the exhibition (research room usage is discussed below in §2.12).

Whilst a specific social media campaign for each exhibition was originally planned, the ambition for this activity outstripped capacity. Detailed evaluation of each exhibition was originally planned to discover its impact on the outcomes for individual visitors. However, this was found to be a disproportionate use of resources, and a light-touch evaluation mechanism (eg. touchpad with pre-populated responses so that visitors could vote) was felt not robust enough to be valuable. A specific project with students to look at exhibition design and evaluation is planned for the near future, which will provide a useful check against interpretation principles and the extent to which exhibitions contribute to and fulfil these.

More detailed evaluation and analysis of this area of work can be found in Appendix 4.

#### 2.4.8 HLF outcomes

HLF's outcomes for Heritage	HLF's outcomes for People	HLF's outcomes for Communities
Heritage will be better managed	<b>People will have learnt about heritage</b>	With HLF investment, environmental impacts will be reduced
<b>Heritage will be in better condition</b>	<b>People will have developed skills</b>	<b>More people and a wider range of people will have engaged with heritage</b>
<b>Heritage will be better interpreted and explained</b>	<b>People will have changed their attitudes and/or behaviour</b>	<b>The local economy will be boosted</b>
<b>Heritage will be identified/recorded</b>	<b>People will have had an enjoyable experience</b>	<b>The local area/community will be a better place to live, work or visit</b>
	<b>People will have volunteered time</b>	<b>The funded organisation will be more resilient</b>

## 2.5 Activity plan 11-13 online activity

### 2.5.1 Overall project outcomes

1. To make it easier for everyone, whatever their level of knowledge, to learn from and engage with the collections in ways that suit them as individuals, families or groups.
2. To be a truly interactive service in which the heritage collections become a catalyst for creativity and a living archive, offering a lively interface between our audiences and the academic community.
3. To create exciting, enticing and flexible multi - functional physical and digital facilities for learning and engagement.

### 2.5.2 Intended project activity

The Activity Plan presented a strategy responding to the scale of the challenge to raise awareness and increase access to the heritage collections whilst acknowledging the scope of opportunity that the internationally significant collections provide. The process generated a large number of diverse ideas and illustrated a wide number of opportunities for activities which would enable greater awareness of and engagement with the collections at a range of levels. It prioritised 9 key areas of activity that would increase the capacity of the Service to deliver enhanced quality core services, build relationships with networks of potential new audiences and enhance the heritage collections to attract new audiences and develop new means of engagement.

As part of the Activity Plan online access was seen as a fundamental tool to increase access and use of the heritage collections, with digitised content available. Whilst online databases and catalogues of digitised content were identified as a crucial access tool, most new audiences want to browse first and need “ways in” to collections. The public have high expectations when accessing information, based on their use of services such as google, i-Tunes, Spotify and YouTube. People are increasingly accessing online content from mobile devices rather than desktop PCs.

A strong online presence was planned including a new website offering a collections database which included digitised content, as well as implementing a Digital Engagement Strategy which intended to use a range of social media and platforms to engage people with the Service and its activities.

#### ***Who formed the audience?***

University students, local community (individuals and groups), special interest groups (Rugby League and contemporary music) schools, adult and family learners.

#### ***What were the aims?***

- Developing resources, website and links to other spaces favoured by potential users including social media.
- Supporting the multimedia facilities in the exploration space.

### 2.5.3 Actual project activity

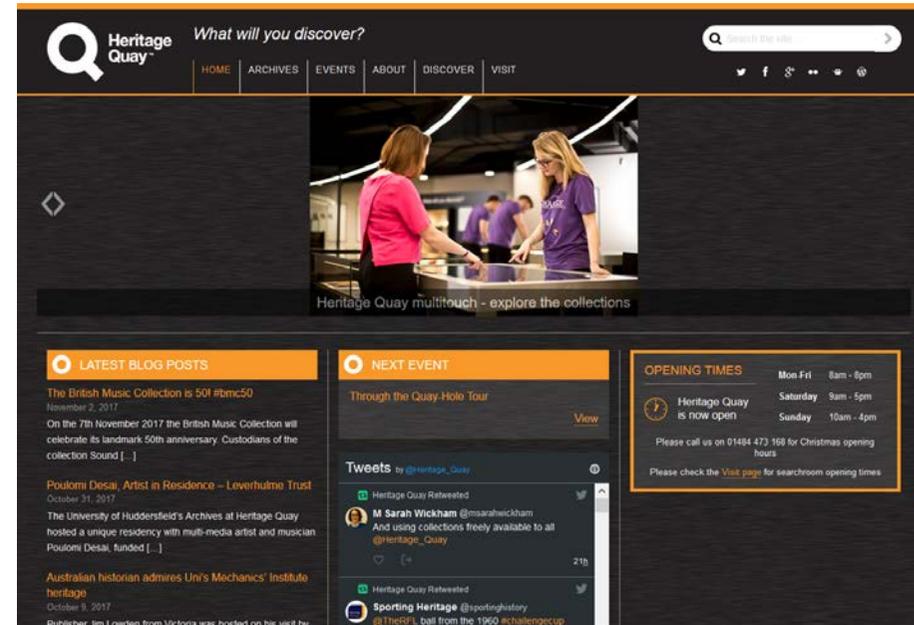
Using the new branding developed as part of the project (see §2.9 below), a new website was created for Heritage Quay outside the University's normal branding and content management system with dedicated domain names used to optimise retrieval by search engines and to build online presence eg. google my business, clear location on google maps.

The website includes a bespoke collections access search tool, which was chosen for its user-friendliness and browsability in comparison with off-the-shelf collections search access packages. It also includes an events calendar, visitor and researcher information, themed collections pages, and links to key social media accounts. Regular blog posts were made, and comments from visitors responded to. A "page rating" tool is available on every page to give visitors a quick and easy way to give feedback on the usefulness of information.

35,540 items from the collections were digitised and intended to be made available through the collections access search tool, as well as other individual items being made available in an ad hoc way eg. through blog posts and social media activity.

Accounts were maintained on Twitter, Facebook and (latterly in the project) Instagram as the wider social media landscape developed over the lifetime of the project and agile analysis saw the limited capacity of the project team focus on those areas of social media where the biggest impact could be demonstrated.

A variety of ways of making online versions of exhibitions available (covered in §2.4 above) were tried, including using the Heritage Quay website, HistoryPin, and a dedicated timeline for the University's 175<sup>th</sup> anniversary, aiming to choose means appropriate to the exhibition content. Activity by project partners was also supported, in particular Sound and Music's Google Cultural Institute online exhibitions, curated by members of the subject interest community – available at <https://artsandculture.google.com/partner/sound-and-music>. Since the conclusion of the project, all the exhibitions mounted during the project are now available at [https://wakelet.com/@heritage\\_quay](https://wakelet.com/@heritage_quay)



## 2.5.4 Logic model

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
<p><b>Budget</b> £36,000 Expenditure of £30,300</p> <p><b>Scheduled February 2014 - August 2014</b> Took place March 2014 – October 2014</p> <p><b>Project resources:</b> Website designer Project Director</p> <p><b>Additional resources (not project funded)</b> Assistant Archivist Collections Volunteers Partners</p>	<p>New website with responsive (mobile-device friendly) design.</p> <p>Online catalogue providing access to 10,000 items of digitised content.</p> <p>Resources for learning and discovery providing “ways in” to the collections.</p>	<p>Content generated from partners, University staff, and users.</p> <p>10% increase in online usage per annum throughout the project.</p> <p>Use of online content; amount of ‘shares’ to wider audiences; links from other online spaces to own website.</p>	<p><b>Short term</b> Increased access to heritage materials; use of heritage materials in learning resources. Audiences will be able to use online services, access the collections and share recommendations, undertake research, prepare for a visit to Heritage Quay, and be aware of the service and events programme on offer. Increased awareness and access to heritage collections amongst audiences. Opportunity for audiences to share content and participate in online spaces.</p> <p><b>Medium term</b> People will discover and learn more about the heritage collections and the stories they tell. Increased profile of Heritage Quay, heritage collections and archive service.</p> <p><b>Long term</b> Increased use of heritage by local and subject interest communities, and University members. Increased understanding of subject interest communities’ needs by the archive service. More resilient service.</p>
<b>Assumptions</b>		<b>External factors</b>	
<p>Using existing platforms where the audience is already engaged will make audiences easier to reach than expecting them only to come to something new.</p> <p>Online presence will provide new and improved methods of engagement for those interested in the subjects covered.</p> <p>Online presence will provide an inspiring entry point for those new to the subject and those new to heritage collections,</p>		<p>Pace of technological and social change including changing use of services.</p> <p>Technical infrastructure will be able to continue to present and store content in a way which is secure (eg. from hackers) and protects owners’ Intellectual Property Rights (IPR).</p>	

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
<p>including interpretation of the collections and the subjects they cover.</p> <p>Online presence will be interactive, with people contributing to and exploring “a living archive”.</p> <p>Online presence will reduce perception barriers of the University not being a place for non-members or informal learning.</p>			

### 2.5.5 Evaluation methods

A range of quantitative and qualitative evaluation methods were chosen for this area of work, reflecting the numerical targets set for website visitors, but also the learning and other social outcomes for individuals as well as the strategic and organisational outcomes for the archive service, and the University.

Qualitative measures such as the standard to which accessible website design and digitisation were carried out by the external suppliers were also used, by benchmarking and appointing suppliers contractually bound to produce work to the highest possible standards.

During the project a “digital engagement dashboard” was developed, a quarterly reporting tool which quickly reflects on the impact of social media and online activity in order to plan future activity within the limited capacity of the team. An example can be seen at Appendix 2. It is important to bear in mind the limitations of data from Google Analytics and social media analytics services when looking at the size of online audiences. For example, website visitors are calculated by Google Analytics based on the IP address of the computer they are using – so if a computer has multiple users accessing a site (for example, a PC in a public library), this will only register as one user.

The parent department of the archive service, Computing & Library Services, is committed to Customer Service Excellence (CSE) as a service improvement and development tool, and has an annual review in the spring of each year with a full assessment against the CSE Standard every three years (most recently in 2017). As part of CSE standards are set and monitored for the provision of information to customers (including online) and for customer service; these include standards for customer satisfaction, responsiveness to customer feedback including through online means and social media, support and services tailored to specified customer groups. These are monitored throughout the year using a range of quantitative and qualitative measures including customer feedback through online means (including social media).

## 2.5.6 Evaluation data

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
AP11. Deliver a programme of digitisation of items from the heritage collections	Quantitative	10,000 more digitised items available	LI	n/a	8652	19306	7582	PARTIALLY MET – ISSUES AFFECTING AVAILABILITY
	Qualitative	Digitisation by external provider meets agreed quality standards	RC/LI	n/a	yes	yes	yes	MET
	Qualitative	Resources valued by onsite & virtual users	RC/LI	n/a	yes	yes	yes	MET
	Qualitative	Digitisation produces appropriate electronic formats for access & storage; full metadata captured	RC/LI	n/a	yes	yes	yes	MET
AP12. Develop a new, sustainable website for Heritage Quay that promotes the service and enables user-friendly access to digitised collections (online catalogue), highlights, and learning resources.	Quantitative	10% increase in online usage p/a - measured in sessions	SW	n/a	4255	16430	14210	MET
	Qualitative	site tested with audiences during development	SW	n/a	no	n/a	n/a	NOT MET
	Qualitative	user feedback from online survey	SW	n/a	n/a	no	yes	PARTIALLY MET
AP13. Develop links to wider online spaces favoured by potential users and populate with content from the heritage collections.	Quantitative	Increasing number of users/followers	SW	n/a	339	1121	1257	MET
	Qualitative	Likes/retweets etc – maintain KLOUT score of 48+	SW	n/a	yes	yes	yes	MET

### 2.5.7 Analysis

The project achieved a dedicated website using the distinctive Heritage Quay brand, and clear and interactive social media presence including through Twitter, Facebook, Trip Advisor, and latterly, Instagram. Over the 4 years of the project the wider social and online environment has continued to be fast-moving, and without a dedicated online/digital post in the team this area of activity has been shared among the project and core staff. The assumptions in the logic model have been fulfilled: that using existing platforms and services as well as developing a dedicated online presence would provide new and improved methods of engagement for the subject interest communities, with people retweeting and engaging with the collections in particular through the work of partners in this area.

The limited budget in the project for digitisation (both for preservation of obsolete formats, discussed in §2.1 above, as well as for access) meant that digitisation had to be focussed on obsolete formats at significant risk, chiefly magnetic audio-visual material, to avoid loss. Whilst a quantity of paper-based and photographic material was also digitised, the majority was audio-visual material created in the last 40 years. Whilst digitisation under the preservation exemption in the Copyright Designs & Patents Act 1988 (as amended) is legally permissible, with access to the digitised material available on site in the search room, permission must be sought from all the rights holders for distribution online. In the case of musical performance (a significant proportion of the collections and of the material digitised through the project), the level of rights clearance can be very complex involving composers, librettists, performers (often 10+), publishers, and occasionally broadcasters all of whom have intellectual property rights (IPR) in the material of different time periods. Whilst there was a window of opportunity to save the unique content of the material, resources were not available to undertake the time-consuming work of rights clearance on a large scale. In conjunction with Sound and Music the service is currently working to establish an appropriate methodology for this which balances the rights of IPR holders whilst making material as widely available as possible.

This area of work during the project was affected by other capacity and resource issues resulting in the late delivery of the website. This in turn did not allow for the broad testing by audiences in advance of the opening of Heritage Quay, the fixed date by which the website was needed; some limited audience testing was carried out but not to the extent planned. Whilst the website is clearly branded, and provides a range of information which is useful to customers, as evidenced by qualitative evaluation and feedback, it was hit by a major technical security issue in autumn 2016. On a daily basis the University receives numerous “denial of service” attacks from hostile parties, with some attempting to exploit a known weakness in Wordpress (the content management system used for Heritage Quay’s website to give the responsive design and branding requirements needed) in order to gain access to the University’s wider corporate systems. The decision was made to implement an alternative collections access package using the off-the-shelf front end (CalmView) used by most other UK archive services rather than the bespoke solution developed for Heritage Quay. Unfortunately there was not sufficient technical capacity in the University’s Computing Services to be able to move CalmView from development into a live environment, and the decision was then reluctantly made in April 2017 to remove the collections access facility from the website in order to remove the serious and significant security risks to the University’s IT environment. Alternative means of collections information were provided during this period, including access to hard copy style catalogues published via Issuu, and an expanded enquiry service. The bespoke solution was re-activated in October 2017 after work to resolve the security issue, and remains available.

### 2.5.8 HLF outcomes

HLF's outcomes for Heritage	HLF's outcomes for People	HLF's outcomes for Communities
Heritage will be better managed	People will have learnt about heritage	With HLF investment, environmental impacts will be reduced
Heritage will be in better condition	People will have developed skills	<b>More people and a wider range of people will have engaged with heritage</b>
<b>Heritage will be better interpreted and explained</b>	People will have changed their attitudes and/or behaviour	The local economy will be boosted
Heritage will be identified/recorded	People will have had an enjoyable experience	The local area/community will be a better place to live, work or visit
	People will have volunteered time	<b>The funded organisation will be more resilient</b>

## 2.6 Activity plan 14-16 Schools activities

### 2.6.1 Overall project outcomes

1. To make it easier for everyone, whatever their level of knowledge, to learn from and engage with the collections in ways that suit them as individuals, families or groups.
2. To be a truly interactive service in which the heritage collections become a catalyst for creativity and a living archive, offering a lively interface between our audiences and the academic community.
3. To create exciting, enticing and flexible multi - functional physical and digital facilities for learning and engagement.

### 2.6.2 Intended project activity

The Activity Plan presented a strategy responding to the scale of the challenge to raise awareness and increase access to the heritage collections whilst acknowledging the scope of opportunity that the internationally significant collections provide. The process generated a large number of diverse ideas and illustrated a wide number of opportunities for activities which would enable greater awareness of and engagement with the collections at a range of levels. It prioritised 9 key areas of activity that would increase the capacity of the Service to deliver enhanced quality core services, build relationships with networks of potential new audiences and enhance the heritage collections to attract new audiences and develop new means of engagement. The Activity Table detailed the activities to be carried out (listed below in §2.6.6 as part of the evaluation data).

It was anticipated that the Learning and Engagement officer would lead on the development of learning programmes and resources for primary and secondary schools. Partnership was seen as essential to the development of schools' activities for the project. The project aimed to work through other learning providers and partners to build links to schools and to access the expertise of these organisations in working with schools to best support their needs and interests. In particular, work was planned with the University's Schools and Colleges Liaison Service to use existing networks and contacts to reach appropriate teachers, and with project partners West Yorkshire Archives Service, Kirklees Museums Service, the Kirklees Music Hub (now Musica Kirklees), Huddersfield Contemporary Music Festival and Sound and Music. This partnership approach would help the Service diversify the profile of its users but also better understand the needs of teachers and pupils.

The project intended to create resources to support the school curriculum and school improvement needs such as boys' literacy, as well as raising awareness of heritage collections and their relevance to the curriculum, and increasing confidence in teachers about the use of collections to support their teaching. Consultation for the Activity Plan during Round 1 Consultation showed that there was a great deal of interest from both primary and secondary teachers in the heritage collections. Schools are attracted to the collections because they provide students with an opportunity to explore different types of historic evidence; access knowledge and link to the University; support the curriculum and motivate students.

#### ***Who formed the audience?***

170 schools and 5100 pupils over three years.

### **What were the aims?**

- Development of rugby league resources
- Developing local studies and music resources for schools with partners (local authority and specialist).

### **2.6.3 Actual project activity**

A programme of workshops and “discovery visits” for on site visitors was developed by the Learning and Participation Officer; these included drama workshops with provider Chol Theatre, and the annual Kids in Museums Takeover Day. 28 such activities were provided. The majority of activities were aimed at primary schools, but sessions were also held with the Huddersfield Home Educators network and secondary schools. A “micro-exhibition” project was also developed with a local primary school which saw the Learning & Participation Officer visiting the school several times to develop the exhibition and then the exhibition being launched and shown in Heritage Quay. The Learning and Participation Officer was also involved in sessions run by the Initial Teacher Training department within the University. Finally a series of five short films with accompanying learning resources linked to the national curriculum were developed, and made available online. These were created towards the end of the project in order to capture the learning from teachers and pupils in the hands-on sessions. Whilst they have been available on YouTube since February 2017 the service lacked the capacity to promote these actively to schools on the departure of the Learning & Participation Officer; the MyLearning website was undergoing redevelopment during the period and so the films and accompanying resources were not available via MyLearning until November 2017.<sup>6</sup>

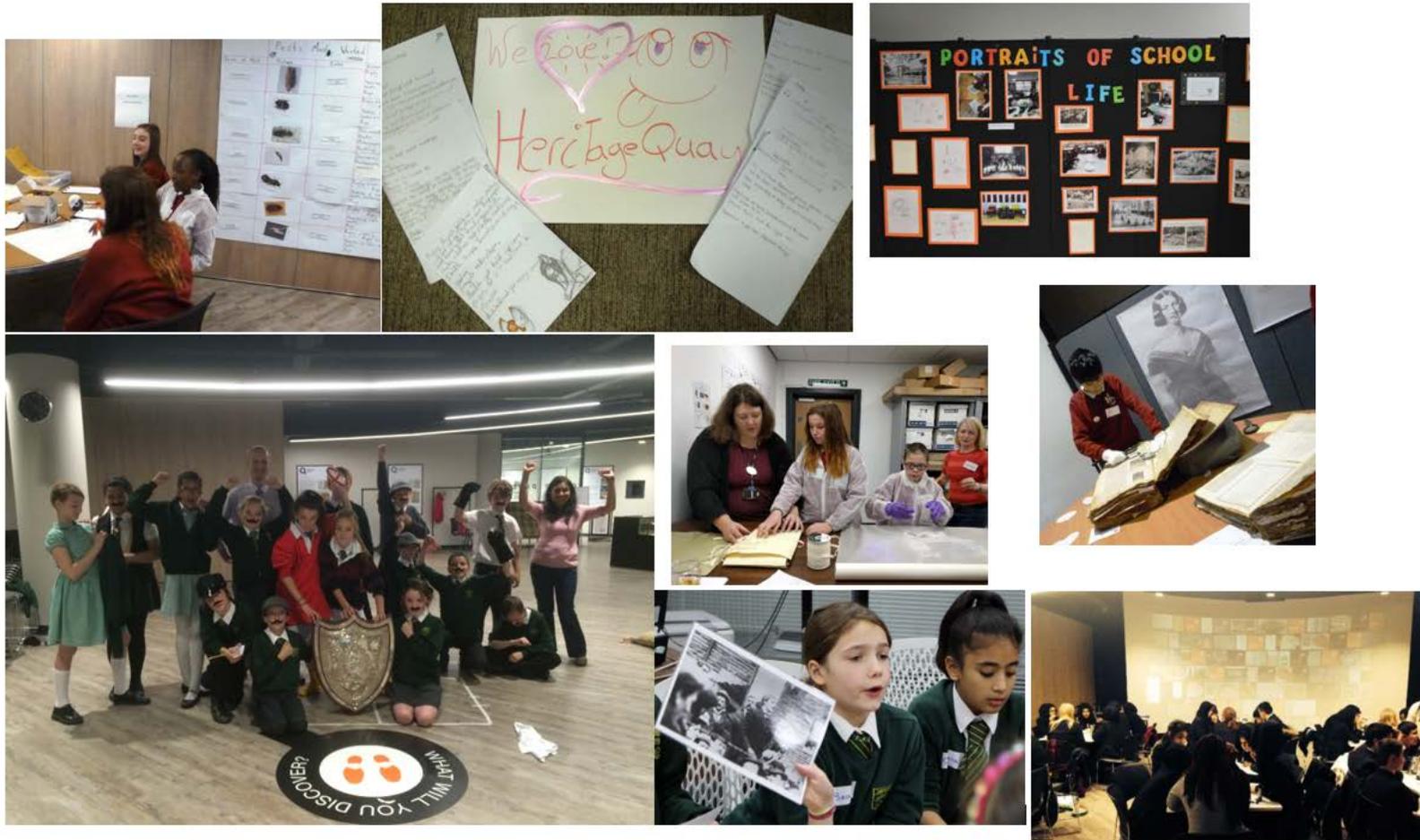
The capacity and strategic direction of potential partners had changed in the intervening period between the Activity Plan consultation and project delivery with Kirklees Museum Service suspending its education provision as part of the local authority cuts to services. Changes of personnel at Huddersfield Contemporary Music Festival, and changes to programmes of work at Musica Kirklees and at Sound and Music also reduced the opportunities for working in partnership to reach schools. The increased pressure on recruitment in the rapidly-changing Higher Education sector meant that colleagues in the Schools and Colleges Liaison Service had less capacity than anticipated to assist in reaching the “right” teachers in schools – often information was sent to a school’s Enrichment Co-ordinator, and may not have been passed on to the teacher responsible for history, music, citizenship or other relevant curriculum areas. However during the project Heritage Quay provided the main venue for Schools and Colleges Liaison Service school visits to campus under their “Higher Education Experience Days” scheme (<https://www.hud.ac.uk/undergraduate/schools-and-colleges-liaison-service/activities-for-students/#/heed>), with around 50 such visits being hosted – this activity is reflected in §2.4 above as “other users’ use of Heritage Quay”.

The project originally planned to build upon the scheme of work and the learning resources created by the Huddersfield Giants’ heritage project (also HLF funded) and to make these national, tailored to each local authority area in which a professional rugby league club was situated. However the low take-up

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<sup>6</sup> Music: <http://www.mylearning.org/music-at-heritage-quay/>  
Politics: <http://www.mylearning.org/politics-at-heritage-quay/>  
Education: <http://www.mylearning.org/education-at-heritage-quay/>  
Industry: <http://www.mylearning.org/industry-at-heritage-quay/>  
Sport: <http://www.mylearning.org/sport-at-heritage-quay/>  
The Arts: <http://www.mylearning.org/the-arts-at-heritage-quay/>

of these existing resources and the direct feedback from teachers meant that this piece of work was not pursued to enable the Learning & Participation Officer to pursue other activities more likely to deliver a higher level of quantitative and qualitative benefits.



*I've enjoyed learning about Victor and Susannah and listening to the music drawing. – Y3 school pupil*

*Great concept. The practitioner was superb. Very engaging, they were eating out of the palm of her hand. Great activities and good pace. It was nice to see some who don't often speak up much having the confidence to perform – KS2 teacher*

## 2.6.4 Logic model

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
<p><b>Budget</b> of £53,600 Expenditure £49,769</p> <p><b>Scheduled Sept 2014 - May 2017</b> Took place February 2014 – Feb 2017</p> <p><b>Project resources:</b> Learning &amp; Engagement Officer</p> <p><b>Additional resources (not project funded)</b> Assistant Archivist Internal partners: Schools and Colleges Liaison Service, academics External partners: West Yorkshire Archives Service, Kirklees Museums Service, the Kirklees Music Hub (now Musica Kirklees), Huddersfield Contemporary Music Festival and Sound and Music</p>	<p>Appointment and retention of Project Officer.</p> <p>Develop “Rugby” learning resources (based on Huddersfield Giants Heritage project so that they can be used in association with the archives of clubs across the UK).</p> <p>Develop local study and music resources for schools in partnership with WYAS, Museums Service, Music Hub, Huddersfield Contemporary Music Festival and Sound and Music to enhance existing local offers.</p>	<p>Schools using resources and activities, positive feedback from teachers and students</p> <p>170 schools / 5100 pupils in total over the project lifetime using online rugby league resources.</p> <p>Rugby league resources taken up by minimum of 3 rugby league clubs per year.</p> <p>65 schools / 1950 pupils over the project lifetime using online resources for local study and music.</p> <p>Partnership projects to create resources and also help build links with specific communities.</p> <p>Training and awareness raising for teachers.</p>	<p><b>Short term</b> Skills and confidence in teachers/educators in using heritage resources. Learning, skills development and enjoyment for individual learners/educators. Using the heritage collections to support the creation of resources. Making teachers and educators more aware of the service and its collections. Alternative inspirational learning environment. Access to expertise of service and university staff. Skills and awareness of use of heritage collections. Access to heritage collections to support curriculum and school improvement needs such as boys’ literacy. Positive learning activities.</p> <p><b>Medium term</b> Increasing awareness of the University and raising aspirations. Signposting to other learning opportunities and progression routes in University. Integration of heritage resources in learning provision in schools and home education. Enhanced offer for learners under 18. “Skills for Life” outcomes ie literacy, self-confidence, employability skills. Increased levels of skill in historical enquiry and information literacy. Increased levels of skill in musical composition. Awareness and practical experience of range of curriculum supported by heritage collections content.</p> <p><b>Long term</b> Partnerships with local authority team and local learning providers.</p>

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
			Integration of the collections into strategy and plans for under 18s learning. More diverse socio economic profile of service users. Increased use of heritage by local community. Increased understanding of community needs by the archive service.
<b>Assumptions</b>		<b>External factors</b>	
<p>Activity will provide new and improved methods of engagement for those interested in the subjects covered.</p> <p>Activity will provide an inspiring entry point for those new to the subject and those new to the heritage collections, including interpretation of the collections and the subjects they cover.</p> <p>Activity will be interactive, with people contributing to and exploring “a living archive”.</p> <p>Creating relationships with University staff and services by working in partnership to reach schools through established.</p> <p>Activity will reduce perception barriers of the University not being a place to aspire to attend.</p>		<p>Capacity among partners, notably the resilience of the Kirklees Adult Learning Partnership.</p> <p>Cultural, heritage, Arts &amp; Creative Provision agenda within Kirklees MBC.</p> <p>Perception of archives, culture and heritage generally, including the impact of local authority funding decisions on heritage in the local area.</p> <p>Participation in archives, culture and heritage generally, benchmarked through Public Services Quality Group Survey of Visitors to British Archives and DCMS Taking Part: The National Survey of Culture, Leisure and Sport.<sup>7</sup></p> <p>Wider perception of University among the local community.</p> <p>Other activity of wider University including the Students Union in the local community.</p> <p>Developments in Higher Education policy and funding particularly in the areas of widening participation.</p>	

<sup>7</sup> PSQG survey reports from 2002-2016 of on-site and remote visitors to archive services available at <http://www.archives.org.uk/publications/journal-of-the-ara-sp-1111397493.html>; Taking Part survey data from 2005 onwards available at <https://www.gov.uk/guidance/taking-part-survey>

### 2.6.5 Evaluation methods

A range of quantitative and qualitative evaluation methods were chosen for this area of work, reflecting the numerical targets set for learner attendances but also the learning and other social outcomes for individuals as well as the strategic and organisational outcomes for learning providers (both in schools and in home education), the archive service, and the University. As feedback forms and surveys were voluntarily submitted by participants these are a self-selected set of data not without bias, but still useful to consider in combination with other evaluation mechanisms.

The parent department of the archive service, Computing & Library Services, is committed to Customer Service Excellence (CSE) as a service improvement and development tool, and has an annual review in the spring of each year with a full assessment against the CSE Standard every three years (most recently in 2017). As part of CSE standards for customer service are set and monitored; these include standards for customer satisfaction, responsiveness to customer feedback, support and services tailored to specified customer groups, and the running of the Heritage Quay events programme. These are monitored throughout the year using a range of quantitative and qualitative measures including customer feedback.

During the project the service applied for Archive Service Accreditation in addition to undertaking formative evaluation during the project, submitted to HLF in autumn 2015 and autumn 2016. Archive Service Accreditation is the UK standard for the 2000+ archive services in all sectors, and defines good practice and identifies agreed professional standards. This UK-wide quality standard offers a benchmark for gauging performance and recognising achievements and is awarded by the UK Archive Service Accreditation Committee; the scheme was launched in June 2013 and on award of Accreditation in March 2016 Heritage Quay became one of only 46 Accredited Archive Services. The Accreditation Standard encompasses extensive reporting and analysis in the “Stakeholders and their experiences” section on engagement – defined as more than simply contact with archives and archive services; it also involves understanding and a sense of personal value, ownership, empowerment.

### 2.6.6 Evaluation data

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
AP14. Recruit Learning and Engagement Officer to lead on the development of resources for schools	Quantitative	Appointed by target date	SW	n/a	yes	n/a	n/a	MET
	Quantitative	Schools using resources & activities	TW	n/a	10	1	3	PARTIALLY MET
	Qualitative	feedback on resources	TW	n/a	yes	yes	yes	MET
	Qualitative	Feedback from officer on personal development outcomes	SW	n/a	yes	yes	yes	MET
AP15. Develop “Rugby” learning resources (developing Huddersfield Giants Heritage project)	Quantitative	Year 1 pilot with 10 schools	TW	n/a	7	n/a	n/a	PARTIALLY MET

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
	Quantitative	year 1 pilot with 300 pupils	TW	n/a	210	n/a	n/a	PARTIALLY MET
	Quantitative	170 schools over project lifetime using resources online	TW	n/a	n/a	n/a	n/a	n/a
	Quantitative	5100 pupils over project lifetime using resources online	TW	n/a	n/a	n/a	n/a	n/a
	Quantitative	Take up by 3 clubs per year	TW	n/a	n/a	n/a	n/a	n/a
	Qualitative	positive response from 60% of schools taking part	TW	n/a	n/a	YES	YES	MET
	Qualitative	learning resources valued to support school curriculum & boys' literacy	TW	n/a	n/a	n/a	n/a	n/a
AP16. Develop local study and music resources for schools in partnership with WYAS, Museums Service, Music Hub, Huddersfield Contemporary Music Festival and Sound and Music.	Quantitative	65 schools using resources online	TW	n/a	0	0	0	n/a
	Quantitative	1950 pupils using resources online	TW	n/a	0	0	0	n/a
	Qualitative	positive response from 60% of schools taking part	TW	n/a	yes	yes	yes	MET
	Qualitative	use of course-specific learning materials support improvements in pupil performance	TW	n/a	n/a	n/a	n/a	n/a

### 2.6.7 Analysis

Some of the assumptions made in the logic model can be seen to have been fulfilled, in that a creative and interactive approach to learning has provided new, improved and inspiring methods of engagement and entry points to the heritage collections and the subjects they cover. Both educators and learners under 18 had a quality experience during their sessions, and were very positive about the session and the longer-term benefits (eg. use of the learning in school afterwards). A range of evaluation forms tailored to each session was completed by all session attendees, with feedback from under 18s captured in a range of ways including discussion, “smiley faces” revealing a high impact on learning and understanding, skills development, and enjoyment. An impact on attitudes and values, eg. feelings about the learners/others or perceptions of things, can also be seen. A perception of Heritage Quay and of the heritage

collections providing an alternative and inspirational environment for learning, and being a place to interact with the University in a “safe” and welcoming place was seen to have developed during the project.

As can be seen from the data above, in the period between the consultation and research for the Activity Plan (late 2012/early 2013), and the start of this area of project activity following the opening of Heritage Quay in October 2014, the circumstances and priorities of a number of prospective partners had changed and numbers anticipated have not been achieved. It was decided to concentrate as a result on the development and delivery of sessions in house and specific to the heritage collections, and then to translate this learning into more “generic” learning resources. The impact of this as an external factor was noted in the logic model. The project found that starting educational provision in what was effectively a new service was difficult: what the archive service itself was had first to be articulated, followed by what the benefits of using heritage and cultural resources for learning were, and then how the specific subject areas could relate to the curriculum specifically. Once contact had been made directly with educators and these communication hurdles cleared, they were very enthusiastic.

Evaluation also found that the majority of primary schools have to plan trips a long way in advance, and often run the same trips from year to year basing the design of half a term’s curriculum in advance. This made it hard to “break in” to an existing cycle of activity – although several local primary schools were able to be more responsive and worked with the service at short notice (often at the school’s behest). A short period of intervention through the project has not enabled a step change in educational provision to be made, although it has been useful to trial activities and excellent to be able to reach teachers and learners through the project.

The budget only allowed for the employment of a Learning & Participation Officer 0.4fte. Whilst a part-time post offers opportunities to some people looking for employment, it also restricts the number of applicants, and for some people makes the necessity to hold other employment (or to freelance) more compelling. Whilst the individual appointed as Learning & Participation Officer had worked part-time and freelance for a number of years, which suited their personal circumstances, this also meant that towards the end of the project they needed to apply for other opportunities and left the project 3 months earlier than the end of their contract.

The part-time nature of the post had an impact on the administration of sessions (for example, handling consent for photography and other administrative matters in liaison with the school/teacher), on the development of pilot sessions into resources for visits and then for online learning resources, on networking and building partnerships, and on the capacity of the service to capitalise on the availability of the online learning resources.

Whilst the service is unable to sustain the workshop and sessions activity post-project a short intervention project is planned to increase awareness and promotion of the online learning resources. Schools and Colleges Liaison Service Higher Education Experience Day visits continue to be hosted in Heritage Quay, with attendees participating in a heritage space, and using the exhibition and multimedia facilities (see §2.4 above).

“Music for Young Players”, a separate project in conjunction with project partners Sound and Music and Huddersfield Contemporary Music Festival, was run during project year 3 but outwith project resourcing; this model may be used to develop further specific provision for schools in future.

### 2.6.8 HLF outcomes

HLF's outcomes for Heritage	HLF's outcomes for People	HLF's outcomes for Communities
Heritage will be better managed	<b>People will have learnt about heritage</b>	With HLF investment, environmental impacts will be reduced
Heritage will be in better condition	<b>People will have developed skills</b>	<b>More people and a wider range of people will have engaged with heritage</b>
<b>Heritage will be better interpreted and explained</b>	<b>People will have changed their attitudes and/or behaviour</b>	<b>The local economy will be boosted</b>
Heritage will be identified/recorded	<b>People will have had an enjoyable experience</b>	The local area/community will be a better place to live, work or visit
	People will have volunteered time	The funded organisation will be more resilient

## 2.7 Activity plan 17-23 University links

### 2.7.1 Overall project outcomes

1. To make it easier for everyone, whatever their level of knowledge, to learn from and engage with the collections in ways that suit them as individuals, families or groups.
2. To be a truly interactive service in which the heritage collections become a catalyst for creativity and a living archive, offering a lively interface between our audiences and the academic community.
3. To create exciting, enticing and flexible multi - functional physical and digital facilities for learning and engagement.

### 2.7.2 Intended project activity

The Activity Plan presented a strategy responding to the scale of the challenge to raise awareness and increase access to the heritage collections whilst acknowledging the scope of opportunity that the internationally significant collections provide. The process generated a large number of diverse ideas and illustrated a wide number of opportunities for activities which would enable greater awareness of and engagement with the collections at a range of levels. It prioritised 9 key areas of activity that would increase the capacity of the Service to deliver enhanced quality core services, build relationships with networks of potential new audiences and enhance the heritage collections to attract new audiences and develop new means of engagement. The Activity Table detailed the activities to be carried out (listed below in §2.7.6 as part of the evaluation data).

It was anticipated that the Assistant Archivist (a permanent post entirely funded by the University, outside the project) would carry out a range of activity to capitalise on the project and develop opportunities facilitated by the project-specific resources and activities. This would include working closely with University academics to identify themes and content from the heritage collections relevant to specific courses, as well as delivery of sessions. It was anticipated that the focus would initially be in the departments of History, Music and Initial Teacher Training.

#### ***Who formed the audience?***

University of Huddersfield students and academics

#### ***What were the aims?***

- Increased use of the heritage collections by students and academics.
- Embedding heritage collections in academic courses in general and scoping relevance of collections to specific university courses and developing course-specific learning material with tutors.
- Digitising material.
- Developing study day workshops in Heritage Quay and workshops for students to use heritage collections in teacher training and community development placements.
- Work with Music and History Depts.
- Developing resources to support degree courses.

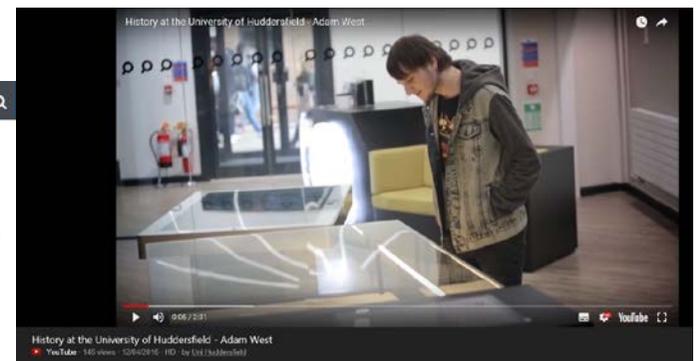
### 2.7.3 Actual project activity

An extensive programme of teaching sessions and intensive work with a range of tutors was begun, developed through the lifetime of the project, and continues to be expanded based on what has been learned during the project. This range of activity represents one-third to one-quarter of the responsibilities and time of a core member of staff, funded by the University. Each year the Assistant Archivist reached more students directly and increased the range of courses and academic departments with which they are connected.

In addition to the direct teaching sessions and input into teaching support, the Assistant Archivist also undertook a range of related projects including First World War discovery days for schools, the celebration of the 175<sup>th</sup> anniversary of the institution, and supported an increasing range of student projects and work placements. They also worked closely with the Alumni officer and other members of the Marketing Communications and Student Recruitment team, School placement officers, as well as staff within the Library. The Project Director also led a Leverhulme Trust funded Artist in Residence project during project year 3.

The postholder worked closely with the project staff (Participation & Engagement, Learning & Engagement and Collections Access Officers) to obtain benefits mutually and reciprocally across all the strands of work in the project.

Heritage Quay and the HLF project feature prominently in recruitment and other publicity materials for the University, particularly in student recruitment for History. The facilities and collections were a factor in the Queen's Anniversary Prize for Higher Education in Music (2015), and in the Teaching Excellence Framework (2016) submission which was assessed as Gold. Heritage Quay hosts high profile visitors and events for the University, including HRH the Earl of Wessex and Chancellor Emeritus Sir Patrick Stewart (both Spring 2017).



*As I was about to undertake a Masters, the pre-course experience was invaluable and extremely beneficial. The staff provided a great induction to what collections we would be working with and I enjoyed working directly with the records – student work placement*

## 2.7.4 Logic model

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
<p><b>Budget</b> of £5,000 Expenditure £3,000</p> <p><b>Scheduled Sept 2013 - August 2017</b> Took place throughout the whole period (in addition to beginning before, and continuing after)</p> <p><b>Project resources:</b></p> <p><b>Additional resources (not project funded)</b> Assistant Archivist Internal partners: academics across 5 of 7 Schools; Marketing Communications &amp; Student Recruitment</p>	<p>Scope out relevance of heritage collections to specific University courses in discussion with tutors.</p> <p>Develop course-specific learning material and deliver with tutors.</p> <p>Digitise material to be used in University learning resources.</p> <p>Develop Study day workshops.</p> <p>Develop workshops for students to use heritage collections in their placements in Initial Teacher Training and Community Development.</p> <p>Work with Music &amp; History departments to develop resources &amp; sign-posting as part of study for use by other users.</p>	<p>Increase in use of heritage collections by students and academics.</p> <p>Increase in University placements in service.</p> <p>600 participants over the project lifetime.</p> <p>Heritage material identified of relevance to min 4 courses and project relevance to further min. 4.</p> <p>Number of items digitised – target 10,000.</p> <p>Number of learning resource developed using digital material.</p> <p>600 users of learning resources.</p> <p>1440 students attend study days.</p> <p>320 students attend workshops.</p> <p>Feedback from service users on ability to access heritage collections using resources and sign-posting.</p>	<p><b>Short term</b> Skills and confidence in academics in using heritage resources. Learning, skills development and enjoyment for individual learners/academics. Using the heritage collections to support the creation of resources. Alternative inspirational learning environment. Skills and awareness of use of heritage collections. Course-related resources developed from collections. Students able to access &amp; use relevant heritage collections. Development of resources using heritage to act as ‘ways in’ for all users. Increased understanding of heritage amongst students.</p> <p><b>Medium term</b> Embed heritage collections in academic courses. Increased awareness of collections and service, its potential as a learning resource and relevance to teacher training and community development work. Increased awareness of collections and service, its potential and relevance to wider areas of study. Signposting to other learning opportunities and progression routes. Increased levels of skill in historical enquiry and information literacy. Individuals have a higher level and range of work-based skills through work placements.</p> <p><b>Long term</b> Greater range of internal partnerships. Greater awareness of potential for special projects. Integration of the collections into institutional strategy and plans for Teaching and Research. More diverse socio economic profile of service users. Increased use of service by local community (15% of University of Huddersfield students are Kirklees residents). More resilient service which is more closely linked to institutional strategy and KPIs.</p>

Assumptions	External factors
<p>Activity will provide new and improved methods of engagement for those interested in the subjects.</p> <p>Activity will provide an inspiring entry point for those new to the subject and those new to heritage collections, including interpretation of the collections and the subjects they cover.</p> <p>Activity will be interactive, with people contributing to and exploring “a living archive”.</p> <p>Creating relationships with University staff and services by working in partnership to reach schools.</p> <p>Activity will more closely integrate the heritage collections and the work of the service into the ongoing work of the organisation.</p>	<p>Capacity and willingness among academic staff.</p> <p>Range of courses and modules currently offered.</p> <p>Balance of content in courses between readily available and wish to avoid parochialism/expose students to a wide range of material, places and partners.</p> <p>Perception of archives, culture and heritage generally, including the impact of local authority funding decisions on heritage in the local area.</p> <p>Participation in archives, culture and heritage generally, benchmarked through Public Services Quality Group Survey of Visitors to British Archives and DCMS Taking Part: The National Survey of Culture, Leisure and Sport.<sup>8</sup></p> <p>Other activity of wider University including the Students Union in the local community.</p> <p>Developments in Higher Education policy and funding particularly in the areas of widening participation, Research Excellence Framework (REF 2014) and Teaching Excellence Framework (launched 2016/7).</p>

### 2.7.5 Evaluation methods

A range of quantitative and qualitative evaluation methods were chosen for this area of work, reflecting the numerical targets set for learner attendances but also the learning and other social outcomes for individuals as well as the strategic and organisational outcomes for individual students and academics, the archive service, and the University. As feedback forms and surveys were voluntarily submitted by participants these are a self-selected set of data not without bias, but still useful to consider in combination with other evaluation mechanisms.

Routine meetings including Student Panels, Course Committees and School Teaching and Learning Committees (among others) provide an opportunity to hear directly from academics and students, sometimes at a distance of time, in addition to direct evaluation of specific sessions and events. Routine monitoring of Customer Service Excellence standards for customer service, used extensively by the whole of Computing & Library Services, provide important means of evaluating the University links area of work throughout the academic year. Other routine reporting within the parent service, including SCONUL statistics for teaching hours by library and archive staff, also contributes.

<sup>8</sup> PSQG survey reports from 2002-2016 of on-site and remote visitors to archive services available at <http://www.archives.org.uk/publications/journal-of-the-ara-sp-1111397493.html>; Taking Part survey data from 2005 onwards available at <https://www.gov.uk/guidance/taking-part-survey>

The Higher Education sector has a range of evaluation mechanisms including data and KPI reporting, qualitative evaluation including the National Student Survey (all leavers), Destination of Leavers, and International Student Barometer. For academic and support staff the University runs a biennial Quality of Working Life survey. Whilst these reflect the feedback of students and staff across the entirety of their experience at the University, and therefore the impact of individual services can be hard to measure, free text comments can be analysed which can give additional insight.

Direct access to the evaluation mechanisms for whole individual modules by students was not possible as a result of the stringent information governance regime in place, as comments can be attributed to individuals and not easily anonymised. However academics (who as the module leaders do have direct access) were asked to pass on any specific feedback relating to Heritage Quay activities and sessions.

### 2.7.6 Evaluation data

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
AP17 Recruit Assistant Archivist post	Quantitative	Appointed by target date	SW	yes	n/a	n/a	n/a	MET
	Quantitative	600 participants during project lifetime	LI		302	545	443	EXCEEDED BY MORE THAN HALF
	Quantitative	increase in student work placements in HQ	LI	4	2	1	4	MET
	Qualitative	Satisfactory appraisal reports	SW	n/a	yes	yes	yes	MET
	Qualitative	positive exit interview [if post-holder leaves in lifetime of project]	SW	n/a	n/a	n/a	n/a	N/A
AP18. Scope out relevance of collection to specific University courses in discussion with tutors	Quantitative	1 course by end year 1; 4 by end year 2; 8 by end year 3	LI	n/a	1	4	3	MET
	Qualitative	collections material identified as relevant to min 4 courses & project relevance to further min 4	LI	n/a	yes	yes	yes	MET
AP19. Develop course-specific learning material and deliver with tutors	Quantitative	8 module minimum: 1 by end year 1; 4 by end year 2; 8 by end year 3	LI	n/a	4	2	2	MET

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
	Quantitative	Number of direct contact hours with students in formal teaching sessions (SCONUL statistic)	LI	n/a	n/a	36	32	MET
	Quantitative	collections material identified as relevant to min 4 courses & project relevance to further min 4	LI	n/a	1	4	3	MET
	Qualitative	use of course-specific learning materials support improvements in student performance.	LI	n/a	yes	yes	yes	MET
AP20. Digitise material to be used in University learning resources	Quantitative	10,000 items digitised as per AP11	RC/LI	n/a	counted above	counted above	counted above	n/a
	Quantitative	600 student users of resources over project lifetime	LI	n/a	14	40	52	n/a
	Qualitative	Positive feedback on relevant & potential of digitised resources	LI	n/a	yes	yes	yes	MET
AP21. Develop Study day workshops in Heritage Quay	Quantitative	1140 participants during project lifetime	LI	n/a	n/a	n/a	n/a	n/a
	Qualitative	positive feedback on workshops	LI	n/a	n/a	n/a	n/a	n/a
	Qualitative	study days raise awareness of heritage collections in University	LI	n/a	n/a	n/a	n/a	n/a
AP22. Develop workshops for students to use heritage collections in their placements in Initial	Quantitative	320 over lifetime	LI	n/a	0	39	0	NOT MET
	Qualitative	positive feedback on quality of workshops to support student improvement	LI	n/a	n/a	yes	n/a	MET

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
Teacher Training and Community Development	Qualitative	students learn to make good use of heritage sources in teaching & working with community groups	LI	n/a	n/a	yes	n/a	MET
AP23. Work with Music & History departments to develop resources & sign-posting as part of study [part of requirements for degree courses] for use by other users	Quantitative	resources completed by end of year 2	LI	n/a	n/a	2	2	MET
	Qualitative	positive feedback from users/students on ability to access heritage collections using the resources & signposting	LI	n/a	n/a	yes	yes	MET

### 2.7.7 Analysis

The assumptions made in the logic model can be seen to have been fulfilled, in that a creative and interactive approach to learning has provided new, improved and inspiring methods of engagement and entry points to the heritage collections and the subjects they cover. Academics and students all had a quality experience during their sessions, and were positive about the session and the longer-term benefits. The range of modules/courses reached by the service has increased; similarly more cohorts of students are now reached eg. in History at least one session in Heritage Quay or using the collections is now embedded across all 3 years, so an individual undergraduate will encounter the collections at least once during each year of their course. Some individuals have progressed to Masters level study based on their use of the heritage collections as a result of their use of the heritage collections during undergraduate study. Several students at postgraduate level have organised their own conferences and events using the facilities and collections in Heritage Quay.

The availability of additional expertise and resources during the project from the Participation & Engagement, Learning & Engagement and Collections Access Officer also contributed to the offer and the range of academics with whom the Assistant Archivist could network. Certainly in the early days after the high-profile opening of Heritage Quay the impetus of the capital works and the initiation of the key strands of project activity contributed to the momentum of the University links programme.

In common with other University archive services it was found that working with academics was very dependent on the individual and on their particular area of research, as well as their own previous use of heritage or cultural collections (or lack of use). The level of gatekeeping was greater in some areas than anticipated, and access to modules or courses could be affected by the availability of a key individual eg. if on sabbatical.

In particular many individual academics expressed a very strong preference for working with real material rather than digital facsimiles (which was also Heritage Quay staff preference), and so the level of digitisation and creation of course resources undertaken during the project was less than anticipated. Several international fields of academic study, including digital humanities, social sciences, psychology and archival science are studying this phenomenon.<sup>9</sup> The service plans to continue to observe and understand this trend post-project.

Developing an in-depth understanding of the very different departments and their quality and validation cycles within the rhythm of the academic year was an area of work to which colleagues working in information & records management within the wider Heritage Quay team, and within Computing & Library Services, were essential. Administrative processes and expectations from the institution and wider sector (including the National Student Survey, the Research Excellence Framework and the Teaching Excellence Framework) had an impact on individual academics and departments, as well as the wider institutional culture, which the Assistant Archivist had to be mindful of and respond to in this area of work.

Whilst the Activity Plan envisaged a series of study days independent of courses, the range of public engagement activity developed by the University during the lifetime of the project (see §2.3 above) and the financial and academic demands on students which has an enormous impact on their availability and energy to undertake non-assessed work meant that this area of activity was not felt to add value to students or the programme, as students could also attend adult learning provision (see §2.3 above) and some did. However additional academic-mediated opportunities, including student exhibitions and projects, were undertaken with the capacity originally planned for the study days activity.

The most difficult aspect of evaluating this area of work was not having direct access to module evaluations. There is also a general focus within the University to limit the number of formal evaluation mechanisms administered to students because the National Student Survey (for final year undergraduates) has such a critical impact within the Teaching Excellence Framework and other systems which affect the level of funding available to the institution (either directly or via the level of student fees charged). Whilst informal qualitative evaluation could be undertaken, such as talking to students after a session, obtaining feedback from academics, observing levels of engagement during a session, and peer observation, this was not as systematic as would be desirable. However being able to correlate this qualitative evaluation with that undertaken through the other mechanisms described at §2.7.5 above at least gives a level of reliability. The activities were seen to result in a high impact on learning and understanding, skills development, and enjoyment. An impact on attitudes and values, eg. feelings about the learners/others or perceptions of things, was also seen. A perception of Heritage Quay and of the heritage collections providing an alternative and inspirational environment for learning, and being a place to interact with the University in a “safe” and welcoming place was seen to have developed during the project.

Finally, an unexpected result of the project in this area was a reduced environmental impact as a result of a slight reduction in the number of formal/taught visits made by groups of students to other heritage venues. Whilst academics feel it is important to expose students to a range of heritage collections and institutions (an opinion with which Heritage Quay staff agree), there is anecdotal evidence that trips which had previously been made to archive services

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<sup>9</sup> See for example Valerie Burton, Robert C. H. Sweeny; Realizing the Democratic Potential of Online Sources in the Classroom, *Digital Scholarship in the Humanities*, Volume 30, Issue suppl\_1, 1 December 2015, Pages i177–i184, <https://doi-org.libaccess.hud.ac.uk/10.1093/lhc/fqv039>

outside Huddersfield (eg. for an introductory “what are archives” session) had been replaced with a visit to Heritage Quay as it “is on the doorstep and has better facilities”.

### 2.7.8 HLF outcomes

<b>HLF’s outcomes for Heritage</b>	<b>HLF’s outcomes for People</b>	<b>HLF’s outcomes for Communities</b>
Heritage will be better managed	People will have learnt about heritage	With HLF investment, environmental impacts will be reduced
Heritage will be in better condition	People will have developed skills	More people and a wider range of people will have engaged with heritage
Heritage will be better interpreted and explained	People will have changed their attitudes and/or behaviour	The local economy will be boosted
Heritage will be identified/recorded	People will have had an enjoyable experience	The local area/community will be a better place to live, work or visit
	People will have volunteered time	The funded organisation will be more resilient

## 2.8 Activity plan 24-36 Participation, volunteering and events

### 2.8.1 Overall project outcomes

1. To make it easier for everyone, whatever their level of knowledge, to learn from and engage with the collections in ways that suit them as individuals, families or groups.
2. To be a truly interactive service in which the heritage collections become a catalyst for creativity and a living archive, offering a lively interface between our audiences and the academic community.
3. To create exciting, enticing and flexible multi - functional physical and digital facilities for learning and engagement.

### 2.8.2 Intended project activity

The Activity Plan presented a strategy responding to the scale of the challenge to raise awareness and increase access to the heritage collections whilst acknowledging the scope of opportunity that the internationally significant collections provide. The process generated a large number of diverse ideas and illustrated a wide number of opportunities for activities which would enable greater awareness of and engagement with the collections at a range of levels. It prioritised 9 key areas of activity that would increase the capacity of the Service to deliver enhanced quality core services, build relationships with networks of potential new audiences and enhance the heritage collections to attract new audiences and develop new means of engagement. The Activity Table detailed the activities to be carried out (listed below in §2.8.6 as part of the evaluation data).

It was anticipated that the Participation and Engagement officer would lead on the development of three “co-creation groups” (later called “programming groups”), each focussing on one area of expertise e.g . Rugby League. The groups were intended to bring together academics and audience experts to exchange knowledge and understanding, and were also anticipated to act as a hub for local interest groups. Whilst the Activity Plan sought not to prescribe activities, so that the groups could truly co-create their activities, suggestions included a regular Listening Club group to use the music collections to stimulate discussion in a similar way to a book club, and other one-off activities including film shows, seminars, lectures etc. The consultation suggested that the co-creation method could work particularly well for Rugby League.

Through developing relationships with community and interest groups, it was expected that the Participation & Engagement Officer would play an important role in marketing Heritage Quay. It was suggested that new partnerships with local rugby football league clubs and music organisations be developed with relationships built long-term to develop these audiences; a group of keen ‘advocates’ or ‘friends’ was to be developed by the Participation & Engagement Officer and supported to act as promoters, encouraging their peers to use the heritage collections. This would also include the use of social media to share collections knowledge. A programme of promotional events was planned to be developed to tie in to wider national promotions, such as Volunteers Week, National Storytelling Week, World Book Day, Local and Community History Month and Heritage Open Weekends.

#### ***Who formed the audience?***

Local community groups and individuals, existing archive service users, Rugby League and contemporary music audiences, University students and academics.

### ***What were the aims?***

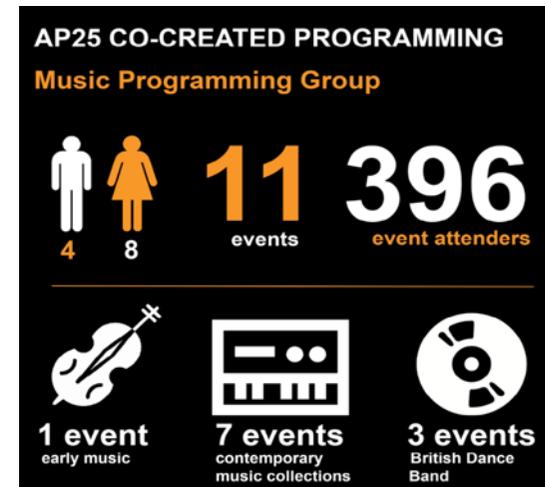
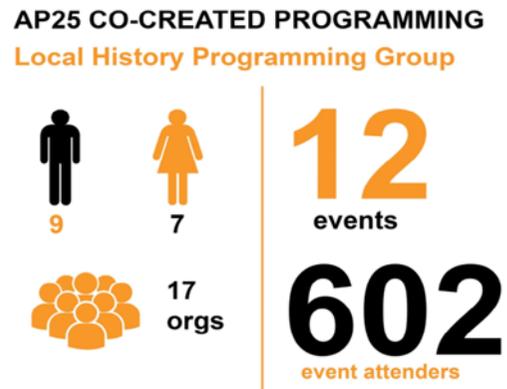
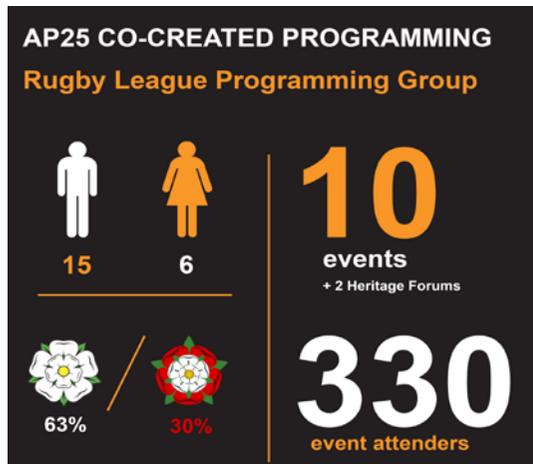
- Develop co-creation programming groups with specific expertise.
- Increased understanding of heritage value of those specific parts of the collection.
- Exchanges between academics and users.
- Output in the form of events, film-shows seminars etc.
- Introducing non-academic users and local history groups to the University heritage collections and service
- Establish a music listening club and creative workshops and events for and about music.
- Create events for Rugby League and establish a RF Heritage Forum.
- Run expert lunchtime talks and heritage open days.
- Provide regular behind the scenes tours of the service.
- Meet relevant teacher cluster groups.
- Take part in undergraduate and graduate open days.

### **2.8.3 Actual project activity**

The Heritage Quay participation programme was delivered by the Participation and Engagement Officer with support from other members of the Heritage Quay team. Its core component was a public events programme developed with three voluntary co-creation/programming groups, led by the Participation & Engagement Officer. Each group covered one of the three key themes: Rugby League, Music and Local History.

The three programming groups met 2-3 times a year at meetings facilitated by the Participation & Engagement Officer to work on the development of the public events programme. Groups were made up of enthusiasts, partners, academics and collection depositors/owners; members gave their time for free or as part of their professional duties where they were a member of staff from a partner organisation. Each group set its own direction and priorities, and had a different membership.

As well as contributing to the public programme of events at Heritage Quay in directly organising and running 33 events, the groups were also consulted on or helped to deliver other elements of the Activity Plan. Over the course of the three years, some strong and effective relationships were developed with the members and with the wider community. Members of the Heritage Quay team supported local groups to develop their own projects and applications (some to HLF, others not), raising levels of aspiration and ambition for heritage within the local area as well as building capacity within the wider community to explore and manage heritage in its widest sense.



*The reach and reputation of Huddersfield Contemporary Music Festival has already made the town a major centre for contemporary music in the world. I would argue that this new housing for the British Music Collection provides two very good reasons for those engaged with new music to head over to Huddersfield as a matter of top priority. – event attendee*

*Thanks once again for your presentation [during an event hosted for the organisation]. It set exactly the right tone for the discussion and really highlighted to the other trustees what an excellent partnership we have. – project partner*



Hardeep Singh Sahota at the Huddersfield Gems launch  
<https://www.youtube.com/watch?v=HL4Ew5vr1>



Maureen talks about being a Collections Volunteer at Heritage Quay  
<https://www.youtube.com/watch?v=KeAFKdHR1>

Further details on all activities can be found in Appendix 4.

## 2.8.4 Logic model

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
<p><b>Budget</b> £90,392 Expenditure £105,641</p> <p>Events were free – no ticket income</p> <p><b>Scheduled October 2014 – July 2017</b> Took place October 2014 – September 2017</p> <p><b>Project resources:</b> Participation &amp; Engagement Officer</p> <p><b>Additional resources (not project funded)</b> Project Director Assistant Archivist Collections Volunteer Computing &amp; Library Services administration team Internal partners: Schools and Colleges Liaison Service, academics External partners Members of the public</p>	<p>“Through the Quay-hole” tours (2x monthly). Establish a Listening Club. Events to tie into the Huddersfield Contemporary Music Festival. Hold Rugby League heritage drop-in workshops for away fans playing Huddersfield Giants. Expert Lunch time talks. Tours for Heritage Open days weekend. Host meetings of relevant teacher cluster groups to include introduction to the service and heritage collections. Participate in prospective student open days. 38 events in total.</p>	<p>Creation of a series of co-creation programming groups focussing on one area of expertise, to co-create a programme of events including film shows, seminars, lectures etc. Encourage each local history group or similar to have one meeting a year at Heritage Quay. Establish rugby football league heritage forum for knowledge sharing and networking.</p>	<p><b>Short term</b> Learning outcomes from learning programmes. Successful co-creation programme of events created and sustained. Participation in programming by audiences. Increased understanding of the heritage of specific interest areas. Enable exchange of knowledge among audiences. Sense of ownership by users and audience members. Increase understanding of the collections. Bring potential users on to campus in a non-threatening way.</p> <p><b>Medium term</b> Increased sense of ownership of the heritage embodied in the collections, and of the service at Heritage Quay. Increased profile of Heritage Quay, heritage collections and archive service. Ongoing programming at Heritage Quay involving co-creation.</p> <p><b>Long term</b> More diverse socio economic profile of service users. Increased use of heritage by local community and University members. Increased understanding of community needs by the archive service. More resilient service.</p>

Assumptions	External factors
<p>Activity will provide new and improved methods of engagement for those interested in the subjects covered.</p> <p>Activity will provide an inspiring entry point for those new to the subject and those new to heritage collections, including interpretation of the collections and the subjects they cover.</p> <p>Activity will be interactive, with people contributing to and exploring “a living archive”.</p> <p>Activity will provide an interface between the academic community and others with an interest in the subjects covered, with Heritage Quay and its programme acting as a local hub.</p> <p>Activity will reduce perception barriers of the University not being a place for non-members or informal learning.</p>	<p>Arts &amp; Creative Provision agenda within Kirklees MBC.</p> <p>Perception of archives, culture and heritage generally, including the impact of local authority funding decisions on heritage in the local area.</p> <p>Participation in archives, culture and heritage generally, benchmarked through Public Services Quality Group Survey of Visitors to British Archives and DCMS Taking Part: The National Survey of Culture, Leisure and Sport.<sup>10</sup></p> <p>Wider perception of University among the local community.</p> <p>Other activity of wider University including the Students Union in the local community.</p> <p>Developments in Higher Education policy particularly in the areas of widening participation, and in public engagement and impact with academic research, including the Research Excellence Framework.</p>

### 2.8.5 Evaluation methods

A range of quantitative and qualitative evaluation methods were chosen for this area of work, reflecting the numerical targets set for participation and attendances and events, but also the learning and other social outcomes for individuals as well as the strategic and organisational outcomes for the archive service, and the University. As feedback forms and surveys were voluntarily submitted by participants these are a self-selected set of data not without bias, but still useful to consider in combination with other evaluation mechanisms.

The parent department of the archive service, Computing & Library Services, is committed to Customer Service Excellence (CSE) as a service improvement and development tool, and has an annual review in the spring of each year with a full assessment against the CSE Standard every three years (most recently in 2017). As part of CSE standards for customer service are set and monitored; these include standards for customer satisfaction, responsiveness to customer feedback, support and services tailored to specified customer groups, and the running of the Heritage Quay events programme. These are monitored throughout the year using a range of quantitative and qualitative measures including customer feedback.

During the project the service applied for Archive Service Accreditation in addition to undertaking formative evaluation during the project, submitted to HLF in autumn 2015 and autumn 2016. Archive Service Accreditation is the UK standard for the 2000+ archive services in all sectors, and defines good practice and identifies agreed professional standards. This UK-wide quality standard offers a benchmark for gauging performance and recognising achievements

<sup>10</sup> PSQG survey reports from 2002-2016 of on-site and remote visitors to archive services available at <http://www.archives.org.uk/publications/journal-of-the-ara-sp-1111397493.html>; Taking Part survey data from 2005 onwards available at <https://www.gov.uk/guidance/taking-part-survey>

and is awarded by the UK Archive Service Accreditation Committee; the scheme was launched in June 2013 and on award of Accreditation in March 2016 Heritage Quay became one of only 46 Accredited Archive Services. The Accreditation Standard encompasses extensive reporting and analysis in the “Stakeholders and their experiences” section on engagement – defined as more than simply contact with archives and archive services; it also involves understanding and a sense of personal value, ownership, empowerment.

### 2.8.6 Evaluation data

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
AP24 Appointment of Participation & Engagement Officer	Qualitative	Successful co-creation programme created & sustained	DS	n/a	yes	yes	yes	MET
	Qualitative	Feedback from officer on personal development outcomes	SW	n/a	yes	yes	yes	MET
AP25. Creation of a series of co-creation programming groups. These will focus on one area of expertise e.g. rugby football league and will bring together academics and audience experts.	Quantitative	3 programming groups meeting termly: 270 attendances over project lifetime (90 p/a)	DS	n/a	63	31	38	PARTIALLY MET
	Qualitative	individual aims set for each group & success evaluated against aims	DS	n/a	yes	n/a	n/a	MET
AP26. Co-creation of a programme of events including film shows, seminars, lectures etc.	Quantitative	2 pilot events in year 1, 6 events per co-creation interest area in years 2 & 3 = 36 over 2 years	DS	n/a	2	16	14	ALMOST MET
	Quantitative	Attendance of 950 over the 3 years	DS	n/a	96	556	651	EXCEEDED
	Qualitative	positive quality of experience of participants at events	DS	n/a	yes	yes	yes	MET
AP27. “Meet the Huddersfield university archive” introductory sessions. These will be targeted at users of other archive services and advertised specifically.	Quantitative	4 p/a	RC	n/a	20	26	18	MET
	Quantitative	200 participants over lifetime	RC	n/a	130	132	39	EXCEEDED

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
These may be combined with meetings of specialist groups at Heritage Quay. = Through the Quayhole"	Qualitative	positive quality of experience of participants at events	RC	n/a	yes	yes	yes	MET
AP28. Encourage each local history group or similar to have one meeting a year in Heritage Quay	Quantitative	1 per annum	DS	n/a	14	15	16	EXCEEDED
	Quantitative	360 participants over lifetime	DS	n/a	1439	934	657	EXCEEDED BY 800%
	Qualitative	positive quality of experience of participants at events	DS	n/a	Yes	Yes	Yes	MET
AP29. Establishment of a Listening Club – The music equivalent of a book club. Meets to listen to and discuss music from the heritage collections. Supported by Sound and Music, Huddersfield Contemporary Music Festival and university students.	Quantitative	100 participants over lifetime	DS	n/a	n/a	11	12	PARTIALLY MET
AP30. Events to tie into the Huddersfield Contemporary Music Festival – Creative workshops, performances etc. Will all have an heritage content focus	Quantitative	3 events during the Festival p/a	DS	n/a	3	3	2	MET
	Quantitative	180 participants over project lifetime	DS	n/a	21	29	43	PARTIALLY MET
	Qualitative	positive quality of experience of participants at events	DS	n/a	yes	yes	yes	MET
AP31. Rugby League Heritage events	Quantitative	13 in total over project lifetime (1 per club)	DS	n/a	2	6	6	MET
	Quantitative	195 participants over project lifetime	DS	n/a	34	83	122	MET
	Qualitative	positive quality of experience of participants at events	DS	n/a	yes	yes	yes	MET
AP32. Rugby football league heritage forum established – Meeting at Heritage Quay and bringing	Quantitative	90 participants over project lifetime	DS	n/a	27	33	0	PARTIALLY MET

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
together rugby football league heritage projects to share knowledge.	Qualitative	positive quality of experience of participants at events	DS	n/a	yes	Yes	yes	MET
	Qualitative	potential new users have had enjoyable experience & would use service in future	DS	n/a	yes	yes	yes	MET
AP34. Heritage Open days – Provide behind the scenes tour of the archive service.	Quantitative	1 event in each year (2 & 3)	DS	n/a	n/a	2	1	MET
	Quantitative	50 participants over project lifetime	DS	n/a	n/a	28	378	MET
	Qualitative	positive quality of experience of participants at events	DS	n/a	n/a	yes	yes	MET
AP35. Meeting of relevant teacher cluster groups in the service – Include introduction to the heritage collections and resources.	Quantitative	2 meetings annually	TW/DS	n/a	1	1	0	PARTIALLY MET
	Quantitative	48 participants over lifetime	TW/DS	n/a	2	20	0	PARTIALLY MET
AP36. Participation in prospective student open days.	Quantitative	2-3 PGR open days	LI	n/a	2	3	2	MET
	Quantitative	6 UGR open days	LI	n/a	2	5	4	MET
	Quantitative	1200 participants over lifetime	LI	n/a	2160	621	440	MET
	Qualitative	PGRs see the service as relevant venue & collection holder	LI	n/a	Yes	yes	yes	MET
	Qualitative	UGRs feel welcome & perceive heritage collections relevant to study	LI	n/a	yes	yes	yes	MET

### 2.8.7 Analysis

The assumptions made in the logic model can be seen to have been fulfilled, in that a creative and interactive approach to participation has provided new, improved and inspiring methods of engagement and entry points to the heritage collections and the subjects they cover.

The co-creation groups, in practice known as programming groups, were a particular feature of the project with group members being directly involved in planning and running events, and contributing to the wider programme and advocacy for Heritage Quay and the collections. The way in which the three groups ran and interacted was very different, reflecting the different interests of the audiences and involvement, as well as the impact of geographical location on attendances and input. Group members valued their involvement with the project and with one another, with many members learning new skills, enjoying and increasing their commitment in other heritage areas. Group membership was reasonably balanced across both genders, with a slightly higher number of male members. 16 members of the programming groups completed detailed evaluation forms which form the basis of the detailed evaluation in Appendix 4 below: of those who completed forms 7 were under 60 and 9 over 60; the small number of evaluation forms made further diversity monitoring impossible.

There were around 150 completed feedback forms from across the events programme, which represents 15% of attendees. More than half of the people explicitly expressed enjoyment and/or fun at an event. At least one third learned or discovered something. The programme also had an impact on attitudes and values, and delivered a range of deeper social benefits. As the programming groups' feedback shows, regular meetings and chances to share knowledge and experience helped Heritage Quay's communities of interest to improve inter-group dialogue and understanding and worked to build the capacity of this groups. The feedback also demonstrates that Heritage Quay is a safe and trusted public space which people were happy to attend. The programme helped children and young people to enjoy life and make a positive contribution, in particular through the Conscientious Objectors project/performances. The contribution of the project to people's wellbeing was clearly seen, although this not an aspect envisaged in the Evaluation Plan or project outcomes.

HLF guidelines advise that demographic analysis considering age, gender, ethnicity, social class and disability should be undertaken, requiring the processing of a high level of sensitive personal data under the Data Protection Act 1998 (which was in force during the project, and replaced by the Data Protection Act 2018 which enacts the EU General Data Protection Regulation (GDPR) in the UK). As the functional lead for information governance within the University outwith this project, the team within Heritage Quay is keenly aware of the need to balance personal privacy concerns on the part of individuals with appropriate legal processing by the University. The team was also well aware of "consultation overload" for visitors and in some cases hostility to providing such data in a way that could be obviously anonymised immediately.

Overall the programme delivered a successful series of events that illuminated the heritage collections, brought in new audiences and built relationships with colleagues in the University and the communities of interest connected to the collections. Related events including the Listening Club, Huddersfield Contemporary Music Festival, and family fun workshops were piloted as envisaged in the Activity Plan and then developed in different ways. Most notably it was anticipated in the Activity Plan that 13 family workshops would be delivered across the project, linked to rugby league matches played between Huddersfield Giants and the other teams playing away. However, from early conversations with the RLPG and The Zone (the trust who deliver community

engagement for the Giants) it became clear that this would not be workable: a key logistical element was that games could be rescheduled at short notice to suit TV schedules - meaning it would be impossible to be flexible enough to respond and promote. It was decided instead to run the sessions at fixed points during school holidays as "Family Fun Fridays" so they could be regular and predictable. Inspiration was still taken from the Rugby League archives but was a smaller part of the experience than anticipated in the Activity Plan.

It was found that there was little appetite on campus for an "Expert Lunchtime Talks" and it was decided early on not to pursue this activity. However a regular tour behind the scenes ("Through the Quay-hole") proved more popular than expected, although numbers varied during the project. It was decided to be more creative for the Heritage Open Days weekend and provide something different (in line with the ethos of this nationally-organised event) as much of the existing offer was free. Working closely with the local organising committee, during the first year (2015) activities responded to the scheduled exhibition "Huddersfield Gems". During the second year and unexpectedly in the third year (thanks to the extension of their contract) the Participation & Engagement Officer organised and hosted the "4<sup>th</sup> World Congress of Psychogeography" in partnership with local practitioners and a University academic; the idea for this grew out of one of the local history programming group's events and it may now become an annual event. During the second year, a three day event, numbers of attendees increased and more practitioners were welcomed from California, France and the Netherlands, as well as many places across the United Kingdom. RTE Radio 1 from Ireland even sent a correspondent to cover the Congress for a piece broadcast in November 2017.

These elements of the project should be considered a resounding success. 3,571 attendances over a three year period is a significant achievement, particularly as the service did not have a track record of events and activities before the project. The most notable successes were in the areas of partnerships and supporting communities of interest. The programme was able to develop useful and collaborative working relationships with many partners, including academics, local organisations and groups from communities of interest. These partners have led to new depositors and researchers but also positioned Heritage Quay strategically as a leader in several important areas, including public engagement at the University. As a result of the work specifically in co-creation and public engagement, several University departments trialled different approaches to their public engagement work and have been able to reach new audiences, in common with the archive service's experience in diversifying and increasing use of the collections based on an understanding of needs and wants. Partly as a result of project work in this area, the University created and funded in summer 2017 a new role of Public Engagement Officer (1fte) based within Heritage Quay but with the remit to increase public engagement with research across the University. The individual who was the project's Participation & Engagement Officer 2014-2017 has been appointed to this new post.

The programme was also able to use in-house and external expertise and community sharing to help audiences, researchers and partners build their capacity, resilience and networks through training, networking opportunities and by creating a space that organisations could use to further their strategic aims and objectives. It should be noted that these two successes were not necessary to the running of this programme, but came from the needs and interests of the programme groups and Heritage Quay staff.

Broadly speaking, the largest groups of participants were retired enthusiasts, particularly for local history and rugby league and local families (a good proportion of whom featured a member of staff at the University). The experimental nature of the programme also resulted in a wide range of one-off

attendees, a good example of which is the 4th World Congress of Psychogeography, which in both years attracted a local, national and international audience of mostly working-age participants.

One audience outlined in the Activity Plan that was under-represented in this part of the programme was students. Even when bookings were clearly from students (identified by email addresses) attendances were still low. Some of the work for any future events should be to identify either the barriers for the students attending as participants outside of studies and/or whether there is a need or desire for specifically student-focused events where the benefits can be more efficiently or effectively communicated.

More detailed evaluation and analysis of this area of work can be found in Appendix 4.

### 2.8.8 HLF outcomes

<b>HLF's outcomes for Heritage</b>	<b>HLF's outcomes for People</b>	<b>HLF's outcomes for Communities</b>
Heritage will be better managed	<b>People will have learnt about heritage</b>	With HLF investment, environmental impacts will be reduced
Heritage will be in better condition	<b>People will have developed skills</b>	<b>More people and a wider range of people will have engaged with heritage</b>
<b>Heritage will be better interpreted and explained</b>	<b>People will have changed their attitudes and/or behaviour</b>	The local economy will be boosted
<b>Heritage will be identified/recorded</b>	<b>People will have had an enjoyable experience</b>	The local area/community will be a better place to live, work or visit
	<b>People will have volunteered time</b>	The funded organisation will be more resilient

## 2.9 Activity plan 37-41 Marketing and communications

### 2.9.1 Overall project outcomes

1. To make it easier for everyone, whatever their level of knowledge, to learn from and engage with the collections in ways that suit them as individuals, families or groups.
2. To be a truly interactive service in which the heritage collections become a catalyst for creativity and a living archive, offering a lively interface between our audiences and the academic community.
3. To create exciting, enticing and flexible multi - functional physical and digital facilities for learning and engagement.

### 2.9.2 Intended project activity

The Activity Plan identified low levels of awareness of the heritage collections across all audiences during the consultation phase, and that the new Service team would need to raise awareness levels to generate initial visits to Heritage Quay itself and to the website, and also to develop programme and content that encourage repeat visits. The marketing and communications had to differentiate between the different motivations that potential users have for using the heritage collections, from general browsing, to specific research needs, and tailor communications accordingly. The HLF project title of 'Heritage @ Huddersfield' was not received positively as a name for the new centre, and marketing and branding consultancy was identified as critical in branding and identity as well as establishing capacity for marketing and promotion outside the University's central marketing team, where there was not capacity. The Activity Plan identified marketing resource available through the project partners to access their specialist audiences, as well as developing a specific Heritage Quay marketing list for a monthly newsletter.

The Activity Plan identified where other areas of work (eg. University links §2.7 above, Participation volunteering and events §2.8 above) would raise profile and presence, particularly in conjunction with regional and national initiatives such as Heritage Open Days, Local and Community History Month. It also anticipated establishing 'advocates' or 'friends' groups in special interest areas to work as promoters of the heritage amongst their peer groups.

#### ***Who formed the audience?***

All audiences.

#### ***What were the aims?***

- Branding and marketing to raise awareness of Heritage Quay and its offer. Includes commitment to publicise innovative aspects of the project.
- Develop e-database to improve communications with segments of market.
- Establish advocate groups in special interest areas.
- Work with partners to link to or take part in regional or national events.

### 2.9.3 Actual project activity

During the early phases of the stage 2 delivery project marketing and branding consultancy was commissioned, which developed a strong brand and a name for Heritage Quay. A communications strategy was also created, aimed to be implementable by the project team with particular emphasis on sustainability, cost efficiency and measureable return on investment to build and maintain a positive profile for Heritage Quay amongst audiences and stakeholders, to promote visitor numbers, to encourage interaction amongst target audiences by creating understanding and providing a reason to respond, to widen access to services and resources, and to identify strengths and weaknesses in ongoing marketing provision and assist in identifying future work programmes.

The branding guidelines and communications strategy were used to commission a bespoke website for Heritage Quay, utilising a local installation of Wordpress as the content management system to ensure that the site was easy to maintain and offered the flexibility needed, as well as making Heritage Quay easy to find outside the University's main website which is predominantly aimed at the recruitment of new students. The website development included the creation of a bespoke Wordpress plug-in which uses an API to draw catalogue data direct from the collections management system calm (rather than the off-the-shelf OPAC facility).

A mailing list was built up, with event attendees, research room visitors etc asked for their consent to be added to the mailing list. However project partners did not make their mailing lists available or circulate to their networks, as had been agreed during the Activity Plan consultation period.

A range of print was created during the project, including a bi-annual "What's On" programme and a series of posters. Online activity included Twitter and Facebook accounts, with some activity on Instagram towards the end of the project. Regular blog posts were made on the website and promoted by other social media. This activity is covered under §2.5 above.

During the project members of the team disseminated learning from the project at ten conferences or training events, one peer-reviewed journal article and other means (eg. newsletters). These can be seen at <https://bit.ly/2JN0cO4> (covering the period 2014-2017). Heritage Quay also featured in "A Year in Archives 2017" published by The National Archives "showcasing the vibrancy and diversity of the archive sector" during the year and celebrating the work that the sector is achieving in the priority areas identified in the new UK Government vision for archives, Archives Unlocked.



#### Huddersfield Musical Theatre Company (formerly the Huddersfield Amateur Operatic Society)

Huddersfield Amateur Operatic Society was formed in 1890 and its first production was 'Iolanthe' by Gilbert and Sullivan in 1897. Many amateur companies launched themselves using the productions of that famous duo, as the mix of drama, comedy and popular melodies went down well with audiences. The Huddersfield Society however, remained committed to reflecting the tastes of the theatre going audiences of the time. From early light opera and operettas came productions from famous mid-century composers such as Irving Berlin and Rodgers and Hammerstein. The transfer time from Broadway or the West End was briefer than might be imagined.

The Huddersfield Society was one of the earliest members of NODA (National Operatic and Dramatic Association) and one of its largest fundraisers in its early years, being noted for their achievement of raising £400 toward local charities in the annual report of 1901. This membership body has given a voice to a network of local societies nationwide over the past century. They hold conferences and competitions to encourage participation and high standards; have negotiated rights for shows to be performed by amateur companies and have publicised and celebrated the work of those societies.

As the Society has always chosen popular productions of the era, focus has now shifted to the musicals of the late 20<sup>th</sup> and 21<sup>st</sup> century, and they are performed under license, often soon after leaving London's West End. To reflect this the Society changed its name in 2015 to the Huddersfield Musical Theatre Company. The archive contains over a century of records relating to the foundation of the Society and its continuing efforts in creating and staging productions. This includes records on the administrative side, including minute books, production files and vocal scores. It also documents how individuals have developed a history with the company, through programmes, cast mementoes and photographic and audio visual records.

This November, the company are performing 'Dirty Rotten Scoundrels' at the Lawrence Batley Theatre. Contact the box office for ticket information.

More information about the Huddersfield Musical Theatre Company can be accessed at [www.huddsmtc.co.uk/shows](http://www.huddsmtc.co.uk/shows)



The action reaches a climax in 'The Desert Rose', 1900



The old bill from the society's first production, 1898



Moving with the times, the society performs 'Dirty Rotten Scoundrels', 2014



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## 2.9.4 Logic model

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
<p><b>Budget</b> £22,000 Expenditure of £23,040</p> <p><b>Scheduled February 2014 – July 2017</b> Took place February 2014 – September 2017</p> <p><b>Project resources:</b> Participation &amp; Engagement Officer Learning &amp; Engagement Officer Collections Access Officer Project Director</p> <p><b>Additional resources (not project funded)</b> Assistant Archivist Collections Volunteers Computing &amp; Library Services Publicity Officer</p>	<p>Develop branding and a marketing plan to reach all audience groups (local, regional and national).</p> <p>Develop e-database and segment according to interest, and send monthly e-news with updates on project, collection, news and events.</p> <p>Deliver programme of advocacy meetings and presentations on campus to embed the use of heritage collections in courses and student life.</p> <p>Develop events and presence around campus and link with campus news, radio and social media.</p> <p>Establish regular tours and inductions.</p> <p>Work with partners and link in with regional or national initiatives and events to take advantage of wider marketing platforms to access new audiences.</p>	<p>Establish ‘advocates’ or ‘friends’ groups in special interest areas to work as promoters of the service amongst their peer groups.</p> <p>Support the groups to develop their own events programmes at Heritage Quay and to use it as a Hub for their networks.</p>	<p><b>Short term</b> Increased awareness of service, Heritage Quay, events programme &amp; offer. Audiences receive regular information about news and events. Increased awareness of collections and use in teaching. Programme of events reflects audience interests. Increased use of centre by target audiences. Increased awareness of breadth of heritage collections and events amongst new audiences.</p> <p><b>Medium term</b> Maximising resources to reach new audiences and increasing awareness of heritage collections. Sustainable use of resources. Increased understanding of potential of heritage collections amongst partners and widening of opportunities.</p> <p><b>Long term</b> Increased collecting/deposits.</p>

Assumptions	External factors
<p>There is an appetite among the identified audiences but clear communications and information would be needed to reach the target audiences.</p> <p>A clear brand and identity for the new Service and facility would help to communicate the offer and identify it as a place for people from outside the University.</p>	<p>Arts &amp; Creative Provision agenda within Kirklees MBC.</p> <p>Perception of archives, culture and heritage generally, including the impact of local authority funding decisions on heritage in the local area.</p> <p>Participation in archives, culture and heritage generally, benchmarked through Public Services Quality Group Survey of Visitors to British Archives and DCMS Taking Part: The National Survey of Culture, Leisure and Sport.<sup>11</sup></p> <p>Wider perception of University among the local community.</p> <p>Other activity of wider University including the Students Union in the local community.</p> <p>Developments in Higher Education policy particularly in the areas of widening participation, and in public engagement and impact with academic research, including the Research Excellence Framework.</p>

### 2.9.5 Evaluation methods

A range of quantitative and qualitative evaluation methods were chosen for this area of work, reflecting the numerical targets set for attendance, newsletter sign-ups etc, but also the learning and other social outcomes for individuals as well as the strategic and organisational outcomes for the archive service, and the University. As feedback forms and surveys were voluntarily submitted by participants these are a self-selected set of data not without bias, but still useful to consider in combination with other evaluation mechanisms.

During the project a “digital engagement dashboard” was also developed, a quarterly reporting tool which quickly reflects on the impact of social media and online activity in order to plan future activity within the limited capacity of the team. An example can be seen at Appendix 2.

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<sup>11</sup> PSQG survey reports from 2002-2016 of on-site and remote visitors to archive services available at <http://www.archives.org.uk/publications/journal-of-the-ara-sp-1111397493.html>; Taking Part survey data from 2005 onwards available at <https://www.gov.uk/guidance/taking-part-survey>

### 2.9.6 Evaluation data

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
AP37. Develop branding and a marketing plan to reach all audience groups (local, regional and national) to raise awareness of new Centre, its resources and programme. Plan to include mix of online activity, e-database, print, banners, events and to work with partners to access their audiences (Sound and Music, Rugby League Cares, Huddersfield Contemporary Music Festival).	Quantitative	marketing & branding commissioned & delivered on time	SW	yes	n/a	n/a	n/a	MET
	Quantitative	assessment of individual marketing activities	SW	n/a	no	no	yes	PARTIALLY MET
	Qualitative	positive comments and feedback	SW	n/a	yes	yes	yes	MET
	Quantitative	3 published articles in peer-reviewed journals, conference papers etc	SW	n/a	2	5	3	MET
AP38. Develop e-database and segment according to interest and send monthly e-news with updates on project, collection, news and events	Quantitative	200 on database prior to launch	SW	n/a	250	n/a	n/a	MET
	Quantitative	1000 by end of year 1	SW	n/a	250	683	910	ALMOST MET
	Quantitative	6 monthly newsletter sent	SW	n/a	0	3	5	MET
	Qualitative	minimal delivery failures as database is up to date: total failure reports	SW	n/a	n/a	4%	5%	MET
	Qualitative	newsletter is relevant & useful to recipients: total open rate (industry mean 30%)	SW	n/a	n/a	40%	45%	EXCEEDED
	Qualitative	newsletter is relevant & useful to recipients:	SW	n/a	n/a	13%	15%	EXCEEDED

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
		total click rate (industry mean 4%)						
AP39. Deliver programme of advocacy meetings and presentations on campus to embed use of heritage collections in courses and student life. Develop events and presence around campus and link with campus news, radio and social media. Establish regular tours and inductions	Quantitative	Assistant Archivist appointed by target date	SW	yes	n/a	n/a	n/a	MET
	Quantitative	number of campus visitors to seachroom and at events	LI	191	241	545	443	MET
	Quantitative	number of campus users of website	SW	n/a	1751	2892	1291	MET
	Quantitative	20 student volunteers over lifetime of project	LI	n/a	6	0	3	PARTIALLY MET
	Qualitative	HQ increasingly recognised by University staff and students	LI	n/a	yes	yes	yes	MET
	Qualitative	positive comments and feedback eg. employability	LI	n/a	yes	yes	Yes	MET
	Qualitative	Examples of creative use of heritage collections	LI	n/a	n/a	yes	yes	MET
AP41. Work with partners and link in with regional or national initiatives and events (eg. Heritage Open Days)	Qualitative	increased awareness of collections	DS	n/a	yes	yes	yes	MET

### 2.9.7 Analysis

The assumptions made in the logic model can be seen to have been fulfilled, in that a clear and recognisable brand and identity for Heritage Quay has helped the project to communicate the offer. Investment in branding and the communications strategy during the period of preparation for the opening of Heritage Quay helped to build a buzz around the launch of the facility and the programme which created momentum into the main events programme and other activities.

However a lack of a dedicated marketing post meant that all marketing and promotion of events, services, heritage collections newly-available for use etc had to be done by the project team as part of their core work. The team's capacity was significantly affected in the early stages of the delivery project when the Project Director had to absorb management of the capital works in the absence of a client-side project manager. The team was able to draw on the graphic design skills of the Computing & Library Services Publicity Officer in designing and creating print, which was fulfilled by the University's Printing Services team. Both were a very great support to the project team in their skills and expertise, as well as the high quality of their work. Whilst some support was received from the University's central marketing team in press and publicity (particularly around external awards) and in amplifying social media posts, none of the core Heritage Quay team are marketers by background and so were more enthusiastic than professionally skilful in this area. Increased capacity for professional marketing and communications at an operational level would have been useful. During year 2 some monthly hours from a paid student helper provided additional capacity in promoting Heritage Quay events.

During the project new EU legislation, the General Data Protection Regulation (GDPR), was due to come into effect (May 2018). As the rest of the Heritage Quay team (outwith the scope of the HLF project) is also responsible for promoting good information governance within the University it was decided to adopt best practice and to require opt-in, informed, consent for marketing communications from the very start: hence the e-subscription list grew more slowly but only included people who had actively chosen to hear from Heritage Quay, as evidenced by the open and click rates in the evaluation data above which are much higher than industry benchmarks (15% click rate rather than 4% benchmark). The project had originally planned to use the corporate customer relationship management system Dynamics for the e-subscription list, but delays in implementation and finalising support within the wider University meant that timescales did not make this possible; instead an EU-based mailing list management platform was chosen which also enabled the e-newsletters to be fully branded.

During the project it was discovered that there was no appetite for separate "Friends" or advocacy groups in addition to the co-creation programming groups (discussed at §2.8 above), this line of activity originally envisaged was not pursued. It also proved difficult to get partner organisations to undertake promotion on behalf of Heritage Quay or to credit/tag it eg. in relevant social media posts. A lack of capacity to build relationships with partner marketing teams, who were at a distance from those members of staff the team regularly dealt with, meant that the project was unable to take full advantage of partners' audiences and reach in their specialist areas in the way anticipated in the Activity Plan.

### 2.9.8 HLF outcomes

HLF's outcomes for Heritage	HLF's outcomes for People	HLF's outcomes for Communities
Heritage will be better managed	<b>People will have learnt about heritage</b>	With HLF investment, environmental impacts will be reduced
Heritage will be in better condition	<b>People will have developed skills</b>	<b>More people and a wider range of people will have engaged with heritage</b>
Heritage will be better interpreted and explained	<b>People will have changed their attitudes and/or behaviour</b>	<b>The local economy will be boosted</b>
Heritage will be identified/recorded	<b>People will have had an enjoyable experience</b>	<b>The local area/community will be a better place to live, work or visit</b>
	<b>People will have volunteered time</b>	<b>The funded organisation will be more resilient</b>

## 2.10 Activity plan 42 Resource discovery

### 2.10.1 Overall project outcomes

1. To make it easier for everyone, whatever their level of knowledge, to learn from and engage with the collections in ways that suit them as individuals, families or groups.
2. To be a truly interactive service in which the heritage collections become a catalyst for creativity and a living archive, offering a lively interface between our audiences and the academic community.
3. To create exciting, enticing and flexible multi - functional physical and digital facilities for learning and engagement.
4. To make radical improvements in the conservation and management of the heritage collections so that they have a sustainable future.

### 2.10.2 Intended project activity

The Collections Conservation Management and Maintenance Plan (2013) provided an understanding of the baseline of the intellectual access to the heritage collections and provided structured advice and costed action plans on how to care for these collections in the future to meet professional archival standards and best practice and enable access for a wide audience. Detailed information about collections makes them possible to access in a range of ways, and underpins many of the other strands of the Activity Plan. Lack of this detailed information also inhibited effective management of the collections, including their long-term preservation (discussed in §2.1 above).

The aim of the intellectual management strategy was to attract high quality collections, make explicit the content of collections and then bring that content information to the attention of potential audiences, and manage collections in a strategic manner. The objectives were to:

- Ensure collections are relevant and high quality.
- Ensure all collections are organised by the correct provenance.
- Establish a coherent cataloguing strategy.
- Provide each collection with sufficient catalogue information.
- Make coherent and robust online collection information easily available online.
- Create a suite of finding aids for accessing collection information.
- Improve capacity for collection management.
- Provide digital curation as a core service.
- Develop and maintain positive and noticeable profile for the Service with core stakeholders.

The chief areas of work were to undertake cataloguing of high-priority collections by the project Collections Access Officer. These priority collections had been identified during the stage 1 development project by their size, content and likely audience demand. The work also identified projects suitable for collections volunteers, who were managed during the project by the Collections Access Officer.

### 2.10.3 Actual project activity

Activity was carried out largely as planned, with a large amount of preparation work undertaken by the core team in appraising printed collections in conjunction with reboxing and repackaging the collections undertaken during 2013 and 2014 to prepare them for the move. Conservation and digitisation work was outsourced (described in §2.1 above) with this specialist work being undertaken alongside cataloguing. The work of the Collections Access Officer also included re-prioritising collections for cataloguing in response to other areas of the Activity Plan, most notably exhibitions (see §2.4 above) and programming groups' events (see §2.8 above). They also undertook much of the co-ordination of the capital works to repair and conserve the heritage collections (see §2.1 above), as well as managing the collections volunteers and student work placements. 28 individuals contributed 2.1fte during the project.

This piece of work was carried out in tandem with other collections access work funded by the National Cataloguing Grants for Archives scheme (2014-5), and throughout the project by the University through the core work of the Assistant Archivist, Archive Assistants and Student Helpers.

During project year 2 and 3 (for 4 months and 8 months respectively) the Collections Access Officer was employed 0.5fte, with their contract extended to September 2017 to allow for the full period of collections access work to be undertaken. The officer then secured a permanent job in May 2017, so two temporary collections access officers were employed for one month each to undertake the remaining work. In addition, two members of the core staff team were seconded for some extra hours to the project in order to provide very specialist expertise in two key areas.



*[I enjoyed] - seeing the other side of the archives. It has helped me understand more about my visits to other archives, when carrying out my own research. – Collections volunteer*

*working on a lovely collection and seeing it come together. Really enjoyed meeting staff and other volunteers. – Collections volunteer*

*[Heritage Quay has opened] a fascinating, eclectic and unparalleled collection of material to a much wider public than has ever been the case. - depositor*

#### 2.10.4 Logic model

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
<p><b>Budget</b> £99,132 Expenditure of £98,601</p> <p><b>Scheduled February 2014 – January 2017</b> Took place March 2014 – September 2017</p> <p><b>Project resources:</b> Collections Access Officer</p> <p><b>Additional resources (not project funded)</b> Project Director Assistant Archivist Collections Volunteers</p>	<p>10.5 complex collections will be fully catalogued and available online</p> <p>12 collections will be catalogued by interns and volunteers and will be available online.</p>	<p>Volunteer hours will reach 2fte. Target is 10 p.a. over 4 years</p>	<p><b>Short term</b> Increased intellectual control over the collections. Collections can be better managed. Access to collection information through an online website. Researchers will be able to better prepare for a visit and to undertake research. The collections will be better publicised and promoted. The activity will underpin the delivery of other areas of the Activity Plan, most notably exhibitions, participation and events, and adult learning.</p>
			<p><b>Medium term</b> Increased sense of ownership of the heritage embodied in the collections, and of the service at Heritage Quay. Increased profile of Heritage Quay, heritage collections and archive service. Increased use of collections in academic research and increased citations, with the possibility of securing further funding.</p>
			<p><b>Long term</b> Increased use of heritage by local community and University members. More resilient service.</p>

Assumptions	External factors
<p>Increased detailed information about collections has a positive impact on people's access for understanding, learning, knowledge creation and enjoyment.</p> <p>Increased levels of collections information enable the service to manage the heritage collections more effectively and efficiently.</p> <p>Following professional standards/best practice enables sharing of data to aggregator services, contributing to dissemination of information and increasing usage in wider networks of interest.</p>	<p>Recruitment and management of volunteers and student work placements.</p> <p>Team capacity to undertake the level of sustained and focussed curatorial work and research balanced with other front-line service activities.</p> <p>Work and priorities of partners and depositors.</p>

### 2.10.5 Evaluation methods

A range of quantitative and qualitative evaluation methods were chosen for this area of work, reflecting the numerical targets set for collections access and participation, but also the learning and other social outcomes for individuals as well as the strategic and organisational outcomes for the archive service, and the University.

The parent department of the archive service, Computing & Library Services, is committed to Customer Service Excellence (CSE) as a service improvement and development tool, and has an annual review in the spring of each year with a full assessment against the CSE Standard every three years (most recently in 2017). As part of CSE standards for customer service are set and monitored; these include standards for collections management in response to depositors, which are monitored throughout the year using quantitative measures.

### 2.10.6 Evaluation data

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
AP42. Dramatically improve the intellectual management of the collections as described in the CIMP. This will involve cataloguing by the Collections Access Officer, volunteers, Assistant Archivist and Archives Assistants	Quantitative	A: accessioning. All collections have accession records	SW	n/a	yes	n/a	n/a	MET
	Quantitative	A: accessioning. All new collections have accession records within 2 weeks of receipt. (Customer Service Excellence Standard)	SW	yes	92%	75%	83%	PARTIALLY MET
	Quantitative	B1: 59 collection level records by March 2017	RC	n/a	yes	yes	yes	MET

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
	Quantitative	B1: 34 collections catalogued by March 2017 B2 22 collections catalogued by July 2017	RC	n/a	8	32	16	MET
	Quantitative	B2 10 volunteers over 4 years	RC	n/a	3	13	12	EXCEEDED
	Quantitative	B2 2fte over lifetime of project	RC	0.36fte	0.12fte	0.71fte	0.9fte	MET
	Quantitative	B3 20 listed collections imported to calm	SW	n/a	13	7	n/a	MET
	Quantitative	B4 9 special collections to audit by July 2016	RC	n/a	8	4	n/a	MET
	Quantitative	B6 complete listing of 4 collections by Dec 2015	RC	n/a	2	2	n/a	MET
	Quantitative	B7 new listing of 21 collections direct to calm by July 2017	RC	n/a	0	18	3	MET
	Quantitative	B8 appraise 43 collections in microformats	SW	n/a	0	43	n/a	MET
	Quantitative	C1 enhance 18 collections - 1 project per year capable of external funding	SW	n/a	0	1	1	MET
	Qualitative	Quality of cataloguing supports implementation of project activities 3-9, 18-33, 35 & 39.	RC	n/a	yes	yes	yes	MET
	Qualitative	Volunteers improve their knowledge & skills	RC	n/a	yes	yes	yes	MET
	Qualitative	volunteers feel they have made a significant contribution to the project	RC	n/a	yes	yes	yes	MET
	Qualitative	User feedback	SW	n/a	n/a	yes	yes	MET
	Qualitative	Success of funding bids	SW	n/a	n/a	1 bid failed	n/a	NOT MET

### 2.10.7 Analysis

The assumptions made in the logic model can be seen to have been fulfilled, in that increasing levels of information about collections and making it freely available online has improved levels and variety of access, underpinning significant parts of the events and exhibitions programme. The service is also better able to manage the heritage collections by having accurate information about their contents, preservation and security needs (eg. market value).

Undertaking significant amounts of appraisal, particularly of duplicate printed/published material, and of material of low enduring value (eg. petty cash slips) in line with professional standards and codes of ethics has also contributed to the more effective and efficient use of storage. Ethical disposal through transfer to other institutions, re-selling, or environmentally sound methods of waste disposal has also reduced the ongoing impacts on the environment.

Regular reviews of the Collections Intellectual Management Plan, through which priorities are identified for collections access and resource implications, meant that the service was able to respond to changing needs among the audiences as well as transfer learning from one project to the next.

Being able to employ dedicated, temporary Collections Access Officers for a short period of time at the end of the project meant that a large quantity of work was carried out in a very focussed way which had been less possible for the project's original Collections Access Officer who was also responsible for managing collections volunteers, contributing to wider service developments (including the opening of Heritage Quay and the move of collections, establishing procedures etc) as well as some front-line service delivery to researchers and event attendees.

The proactive approach to volunteer management, and the high level of skills developed by volunteers through the project in cataloguing and appraising heritage collections (under supervision) meant that the service has a feasible strategy for public volunteering as well as for University of Huddersfield student work placements. This is manageable both for levels of resources as well as providing a range of opportunities for volunteers to contribute, learn and enjoy from the experience.

Because of the smaller size and scope of the collections remaining to be catalogued, these are less suitable for external funding bids eg. from the National Cataloguing Grants for Archives scheme. The Service now plans to investigate a range of other possibilities in addition to core resources and collections volunteers, including PhD studentships, and "collections weeks" where the whole team focusses on collections access work whilst the research room and other activities are suspended for the week during quiet periods for the service (eg. during the University summer vacation).

### 2.10.8 HLF outcomes

HLF's outcomes for Heritage	HLF's outcomes for People	HLF's outcomes for Communities
Heritage will be better managed	People will have learnt about heritage	With HLF investment, environmental impacts will be reduced
Heritage will be in better condition	People will have developed skills	More people and a wider range of people will have engaged with heritage
Heritage will be better interpreted and explained	People will have changed their attitudes and/or behaviour	The local economy will be boosted
Heritage will be identified/recorded	People will have had an enjoyable experience	The local area/community will be a better place to live, work or visit
	People will have volunteered time	The funded organisation will be more resilient

## 2.11 Activity plan 43-44 Training, and 45 Evaluation

### 2.11.1 Overall project outcomes

1. To make it easier for everyone, whatever their level of knowledge, to learn from and engage with the collections in ways that suit them as individuals, families or groups.

### 2.11.2 Intended project activity

To be effective, and to develop their skills, the Activity Plan envisaged that through training the co-creation groups would be fully aware of the collections, and would ensure that project staff have the skills to deliver the project.

It also envisaged the creation of an Evaluation strategy and methodology to assist with the evaluation of the project activities and outcomes, using external consultancy to increase capacity as well as to develop staff to develop evaluative tools and skills. Ongoing evaluation during the project to review and reflect on progress would also ensure that the results of evaluation feed into the development of the project and the sustainability of services. Computing & Library Service's existing commitment to Customer Service Excellence was taken account of in designing the approach to evaluation.

### 2.11.3 Actual project activity

Training was delivered to members of the Rugby League Heritage community on basic archive skills and Copyright and Data Protection, as the demand from the community was for practical skills to use in their own projects associated with individual clubs, rather than in the content of the national governing body collection; this training was continued through the Heritage forums which address more practical or collections-focused knowledge and skills. An "Introduction to music collections" session was delivered in October 2015 but due in part to the nature and size of the music programming group there was little appetite for further training and the members were unsure what training might be suitable for them. No training was delivered for the Local History Programming Group (by its request), mostly because the History Research Skills strand of AP3 Adult Learning covered the areas which would be useful for the group.



All the project staff had an annual appraisal and 6-monthly review at which development and training needs were discussed; all project staff attended training appropriate to their needs. The wider Service team also benefitted from an annual away day at which team development, strategy and planning were undertaken in addition to continuing personal and professional development.

Training for project volunteers outside the programming groups is covered at §2.8.

Evaluation consultancy was commissioned just after the opening of Heritage Quay, which created a strategy and a plan of the qualitative and quantitative measures to be used in the evaluation of the project. The Project Director was responsible for implementing the strategy during the project, including

making an annual report to HLF, managing the reporting on measures through the project’s evaluation dashboard, and reviewing the evaluation of individual activities. The Project Director is also the Service lead for Customer Service Excellence, with which the project’s evaluation is closely allied.

#### 2.11.4 Logic model

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
<p><b>Budget</b> £2,000 for staff training £7,000 for evaluation consultancy Expenditure of £1,974 training £7,945 for evaluation</p> <p><b>Scheduled August 2014 – July 2017</b> Took place August 2014 – March 2018</p> <p><b>Project resources:</b> Participation &amp; Engagement Officer Learning &amp; Engagement Officer Collections Access Officer Project Director</p> <p><b>Additional resources (not project funded)</b> Assistant Archivist</p>	<p>Training sessions. Evaluation report commissioned. Evaluation activities undertaken.</p>	<p>Training sessions for programming groups.</p>	<p><b>Short term</b> Individual learning outcomes from learning programmes. Skilled staff and volunteers able to undertake daily tasks and to contribute to strategic delivery. Successful co-creation programme of events created and sustained. Participation in programming by audiences. Increased understanding of the heritage of specific interest areas. Enable exchange of knowledge among audiences. Sense of ownership by users and audience members. Increase understanding of the collections. Bring potential users on to campus in a non-threatening way. Evaluation of individual events and activities contribute to more effective operations in future.</p> <p><b>Medium term</b> Skilled staff and volunteers able to contribute to strategic direction and development of service and of collections. Increased sense of ownership of the heritage embodied in the collections, and of the service at Heritage Quay. Increased profile of Heritage Quay, heritage collections and archive service. Ongoing programming at Heritage Quay involving co-creation. Evaluation contributes to strategic development and delivery of service.</p> <p><b>Long term</b> Better skilled workforce. Increased sustainability for service. More diverse socio economic profile of service users. Evaluation contributes to strategic planning and development.</p>

Assumptions	External factors
<p>Training activities will provide and develop knowledge and skills.</p> <p>Training will provide new and improved methods of engagement for those interested in the subjects covered.</p> <p>Training will provide an inspiring entry point for those new to the subject and those new to the heritage collections, including interpretation of the collections and the subjects they cover.</p> <p>Training will be interactive, with people contributing to and exploring “a living archive”.</p> <p>Training will provide an interface between the academic community and others with an interest in the subjects covered, with Heritage Quay and its programme acting as a local hub.</p> <p>Training will reduce perception barriers of the University not being a place for non-members or informal learning.</p> <p>Evaluation and reflection will contribute to increased effectiveness and impact of programming and of other activities.</p> <p>Evaluation will demonstrate whether, and how, individual targets and strategic KPIs are met.</p> <p>Both quantitative and qualitative data, as well as a project narrative, will be needed for effective evaluation.</p>	<p>Vibrancy and provision of wider heritage and information management sectors both locally and nationally.</p> <p>Wider perception of University among the local community.</p> <p>Other activity of wider University including the Students Union in the local community.</p> <p>Developments in Higher Education policy particularly in the areas of widening participation, and in public engagement and impact with academic research, including the Research Excellence Framework.</p>

### 2.11.5 Evaluation methods

A range of quantitative and qualitative evaluation methods were chosen for this area of work, reflecting the numerical targets set, but also the learning and other social outcomes for individuals as well as the strategic and organisational outcomes for the archive service, and the University. As feedback forms and surveys were voluntarily submitted by participants these are a self-selected set of data not without bias, but still useful to consider in combination with other evaluation mechanisms. The parent department of the archive service, Computing & Library Services, uses appraisal and performance development frameworks for staff and for the evaluation of training and development opportunities. Again, as these reflect the personal viewpoints of the participants they are not entirely objective but provide useful insight.

### 2.11.6 Evaluation data

Item	Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
AP43. Archivists will provide training for co-creation groups on the collections to ensure they are fully aware of the collections	Quantitative	Training provided for all 3 co-creation groups	DS	n/a	2	1		PARTIALLY MET
	Quantitative	Training provided for 24 participants over the project lifetime	DS	n/a	22	5		MET
	Qualitative	individuals have developed skills & met personal aims through training; training provided appropriate support	DS	n/a	yes	yes	yes	MET
AP44. Staff employed on the project will receive training in professional subjects relevant to the project (mixture of on-the-job and external training courses, mentoring, professional networking & training events).	Quantitative	Each member of staff receives training	SW	n/a	yes	yes	yes	MET
	Qualitative	staff have the skills to deliver the project successfully	SW	n/a	yes	yes	yes	MET

### 2.11.7 Analysis

The assumptions made in the logic model can be seen to have been fulfilled, in that specific training met the needs identified by the programming groups and by individual staff members. Training developed their skills and knowledge which contributed to the effective and enjoyable completion of tasks and areas of project work. The training needs of the programming groups were met in ways chosen by and appropriate to the groups, in keeping with the ethos of the groups (see §2.8 above).

Evaluation during the project contributed to programming, scheduling and prioritising activity, and to maximising the use of resources. However the project lacked capacity to implement evaluation as fully as was originally intended, owing to the small numbers in the staff team and the range of activities undertaken. The loss of the Project Director during the capital works on the facilities (see §2.2 above) had the biggest impact here. An agile, action-research approach was taken across much of the Activity Plan in which an activity was planned, run, evaluated and then a decision made on whether or not to repeat it, refine and re-run it, or to abandon it.

Because of the comparatively small numbers at many events a decision was taken not to request detailed equality monitoring information covering all characteristics as this was felt to be disproportionate as well as being seen to be potentially intrusive. However sampling was undertaken to monitor

equality and diversity from which it can be seen that a more diverse range of people used the collections and visited the service than previously, although this was not in proportion with the potential target audiences and the Service is developing further plans in this area.

Evaluation of a project of this scale and complexity is a time-consuming process, with the main body of this report merely summarising the detail contained in Appendices and in other documents. The capacity of the University Archivist & Records Manager to undertake this work after the project's conclusion has been limited, with the University lacking resources to commission and to fully support external consultancy. During the project HLF has revised and published expanded guidance on evaluation, which will be incorporated into future project planning along with the lessons learned here. It would have been desirable to appoint external consultancy to undertake final evaluation, in addition to the external expertise commissioned in 2014 to establish the evaluation strategy and methodology before undertaking the Activity Plan.

#### 2.11.8 HLF outcomes

<b>HLF's outcomes for Heritage</b>	<b>HLF's outcomes for People</b>	<b>HLF's outcomes for Communities</b>
<b>Heritage will be better managed</b>	<b>People will have learnt about heritage</b>	With HLF investment, environmental impacts will be reduced
<b>Heritage will be in better condition</b>	<b>People will have developed skills</b>	<b>More people and a wider range of people will have engaged with heritage</b>
<b>Heritage will be better interpreted and explained</b>	<b>People will have changed their attitudes and/or behaviour</b>	<b>The local economy will be boosted</b>
<b>Heritage will be identified/recorded</b>	<b>People will have had an enjoyable experience</b>	<b>The local area/community will be a better place to live, work or visit</b>
	<b>People will have volunteered time</b>	<b>The funded organisation will be more resilient</b>

## 2.12 Activity plan 46-48 Using the heritage collections in the research room, overall targets and digital engagement, plus Customer Service Excellence standards

This section was created in the Summary of activities, evaluation targets and approaches table in the Activity Plan to bring together the overall targets for using the heritage collections both on-site and on-line. No specific activity additional to that detailed in §2.3 - 2.11 above was intended or carried out.

The assumptions were that an increase in interest in the heritage collections would have an impact on the number of individuals pursuing their own research in the research room, and that digital engagement would contribute to raising the profile and wider impact of the project.

### 2.12.1 Evaluation methods

A range of chiefly quantitative and qualitative evaluation methods were chosen for this area of work, reflecting the numerical targets set for participation and attendances and events, but also the learning and other social outcomes for individuals as well as the strategic and organisational outcomes for the archive service, and the University.

### 2.12.2 Evaluation data

Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
Quantitative	Increase numbers of research room visitors annually to reach 1832 by end of project	SW	165	121	220	158	NOT MET
Quantitative	Increase quantity of items requested by research room visitors	SW	849	3974	7382	4859	EXCEEDED
Qualitative	85% of customers (research room and enquirers) totally satisfied with the services they receive (Computing & Library Services Customer Service Excellence Standard)	SW	n/a	100%	100%	94%	MET
Quantitative	increase numbers of enquiries	SW	430	467	664	957	MET
Quantitative	Total target for reach in project lifetime - 29,000 in total - includes all targets above	SW	n/a	Total 35, 144 individual visitors/participants Total online visitors/followers 51,323			EXCEEDED
Quantitative	Total target for visitors at end of project 6,240 p/a - includes all targets above	SW	n/a	Total individual visitors/participants 12,272			EXCEEDED
Qualitative	Maintain KLOUT ranking of 45 (monthly statistics)	SW	n/a	n/a	yes	yes	MET
Qualitative	10 most used resources to inform digitisation	SW	n/a	n/a	yes	yes	MET

Type	Measure	Owner	2013/4	Yr 1	Yr 2	Yr 3	Rating
Quantitative	100% of additions to the collections in the University Archives Service will be initially processed within 2 weeks of receipt (Computing & Library Services Customer Service Excellence Standard)	SW	100%	92%	75%	83%	PARTIALLY MET
Quantitative	95% of email enquiries received from all customers (both internal and external) will be responded to within one normal working day & where relevant, progress updates were provided where an enquiry couldn't be satisfied immediately (Computing & Library Services Customer Service Excellence Standard). During 2013/4 and 2014/5 the standard was set at 90%.	SW	90%	90%	100%	98%	MET
Quantitative	85% of customers totally satisfied with the services they receive (Computing & Library Services Customer Service Excellence Standard)	SW	n/w	100%	100%	100%	EXCEEDED

*Records are accurately catalogued. Procedures for retrieving information very good. We got from our visit what we came for.  
Thank you. – researcher*

*HQ's political collections were great and the archive's space & search room in particular were excellent. - researcher*

### 2.12.3 Analysis

In common with many other archive services numbers of visitors to the research room onsite have plateaued or declined, but the number of items produced has substantially increased – suggesting that visitors are able to access more items from the collections on their visits. Changes to the provision of copying services (with users now able to make their own copies using mobile phones/cameras, within the limitations of copyright legislation) also have an impact on the number and flow of users in the research room. Very high levels of customer satisfaction, and exceeding the targets for onsite visitors for events suggest that the Heritage Quay offer is of high quality and meets customers' needs.

Improvements to service infrastructure, such as the online catalogue and associated collections management improvements such as implementing the locations database within the collections management system, have significantly reduced the staffing resources required to provide basic access to collections and to undertake effective management activities.

## 2.13 Project management

### 2.13.1 Overall project outcome

Effective and efficient project management underpins all four of the project outcomes; it is not a project outcome in its own right.

### 2.13.2 Intended project activity

It was intended to run the project as effectively as possible using the governance, procurement and other project management arrangements outlined in the Project Management Plan.

### 2.13.3 Actual project activity

Much of the administrative and project management processes described in the Project Management Plan were completed successfully. However at the outset of the stage 2 delivery project the Deputy Director of Estates and Facilities retired. This post had been planned to undertake the role of Construction Client-Side Project Manager. Owing to capacity issues within the Directorate and the timescale constraints of the project, the Project Director fulfilled this role in addition to their role as Project Director and without the experience, qualifications or training in a construction environment needed for this role. Additional resource was made available from the University to increase the day-to-day construction project management undertaken by the Project Architect. This lack of capacity impacted on project resources in areas such as evaluation and resource discovery (commented on above), in particular with the extended level of snagging necessitated by the lengthy period before the repository environment became stable.

### 2.13.4 Logic model

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
<b>Budget</b> of £84,685 + £1,240 recruitment Expenditure of £77,147 + £1,195  <b>Scheduled from 06/09/2013 to 31/08/2017</b> Took place 06/09/2013 to 30/11/2017  <b>Project resources:</b> Project Director Marketing consultancy Evaluation consultancy  <b>Additional resources (not project funded)</b> Project Sponsor Project Steering Group	Backfill Project Director	n/a	<b>Short term</b> Efficient use of resources to deliver project. Minimise and manage risks.
			<b>Medium term</b> Ensure quality. Able to deliver quality services more efficiently and effectively. Enhanced customer and stakeholder satisfaction.
			<b>Long term</b> Transformed service. Development of project management methodology, and skills of staff.

Inputs	Outputs: activities	Outputs: participation	Outcomes: impact
University HR department University Marketing department Computing & Library Services administration team			
<b>Assumptions</b>		<b>External factors</b>	
Sufficient human and financial resources continue to be made available as planned in the Project Management Plan. Corporate support from the University of Huddersfield and from the HLF will continue. No radical changes occur to available and/or recommended standards for the care of historic collections and for the provision of high-quality archive services as outlined in the Service Strategic Plan.		Developments in the wider University and parent body.	

### 2.13.5 Evaluation methods

The Project Management Plan established project management tolerances which involve a mixture of quantitative and qualitative measures:

Time	+/- 3 weeks
Costs	<>5% on individual budget headings None on overall Project cost
Quality	None
Scope	None
Risk	As defined on the Project risk register

During the project formative evaluation was undertaken including project management, with evaluation reports submitted to HLF in autumn 2015 and autumn 2016. Quarterly monitoring reports and (roughly) bi-annual grant claims were also made to HLF.

### 2.13.6 Evaluation data

	<b>Collections conservation management &amp; maintenance workpackage</b>	<b>Design workpackage</b>	<b>Activity Plan</b>
<b>Time</b>	Originally scheduled for completion on 30/09/17  Completed on schedule 30/09/17	Originally scheduled for completion on 19/08/14  Handed over 12/9/14 (practical completion 12/10/14)	Originally scheduled for completion on 31/07/17  Completed 31/08/17
<b>Cost</b>	Total budget of £75,709  Total expenditure of £95,349	Total budget of £1,404,087 (£56,828 contingency)  Total expenditure of £1,324,481 No contingencies used	Budget of £467,049  Expenditure of £453,705
<b>Quality</b>	None	None	None
<b>Scope</b>	None	None	None
<b>Risk</b>	No risks identified for this workpackage	All risks within tolerances and closed by end of snagging period	All risks within tolerances and closed by end of year 1 of Activity Plan
<b>Quality acceptance criteria</b>	MET Completion of years 1-3 (ie Project elements) of overall conservation management & maintenance workpackage. Targets for repackaging, conservation.	MET Facilities open on time and compliant with legislation and best practice for accessibility. Repository environment compliant with PD5454:2012 requirements. Multimedia hardware functional and performs to agreed specifications and standards. Multimedia software functional, performs to agreed specifications and complies with relevant standards for accessibility.	MET Completion of Activity plan. Targets for audience development and engagement met. Completion of years 1-3 (ie Project elements) of overall cataloguing priority action plan. Compliance with Service Collections Information Policy (standards, level of description). Catalogue available online and onsite.

### 2.13.7 Analysis

Effective project management underpinned the successful delivery of the project objectives, and similar approaches have been used for a subsequent HLF project in conjunction with West Yorkshire Archive Service Kirklees and Kirklees MBC.

### 3. Review

#### 3.1 Summary of project outcomes

As described in the detail of section 2 above, the project has transformed access to the heritage collections and the wider archives service at the University of Huddersfield, providing the step-change in access by audiences, service delivery, facilities and infrastructure, and collections care that were anticipated.

Without the investment in the **capital works to repair and conserve the heritage collections**, nothing would have happened as the University lacks the resources to make the level of investment needed to preserve the content stored on the particularly vulnerable magnetic media and to stabilise the paper and photographic formats that were at highest risk. Without the investment in adequate repository facilities created by the **capital works to create the facilities in Heritage Quay** the collections would have continued to be threatened by mould and subject to the risks identified in the Collections Conservation Management and Maintenance Plan. As a result of the project **radical improvements in the conservation and management of the heritage collections have been made, enabling them to have a more sustainable future.**

Without the project investment in the **capital works to create the facilities in Heritage Quay** the users of the archive service would have continued to use the shared facilities in the University Library which had been identified as restrictive for access to the collections and a barrier to participation by people from outside the University. The project fulfilled its ambition **to create exciting, enticing and flexible multi - functional physical and digital facilities for learning and engagement** - these multi-award winning facilities provide the service with high quality and innovative spaces which are appropriate for the needs and demands of the immediate audience for the heritage collections and for wider use – enabling Heritage Quay and the University Archive Service **to be a truly interactive service in which the heritage collections become a catalyst for creativity and a living archive, offering a lively interface between our audiences and the academic community.**

The level of investment and ambition in the **Activity Plan** could not have been fulfilled without the project. Whilst the core service would have delivered the “University links” section of the plan, using the new permanent post identified and funded during the capacity and scoping work undertaken during the stage 1 development project, this would have been at a lower level of engagement and with much more limited access to the heritage collections without the project. The project has made it **easier for everyone, whatever their level of knowledge, to learn from and engage with the collections in ways that suit them as individuals, families or groups.** Impacts on participants, volunteers, exhibition visitors, digital audiences, partners and staff are discussed in detail in §2 above.

#### 3.2 HLF outcomes

As shown in §2, this project as a whole has fulfilled HLF’s outcomes for heritage, people and communities, with all outcomes being addressed by at least two of the eleven work areas and the majority by seven or more work areas:

HLF's outcomes for Heritage	HLF's outcomes for People	HLF's outcomes for Communities
Heritage will be better managed	People will have learnt about heritage	With HLF investment, environmental impacts will be reduced
Heritage will be in better condition	People will have developed skills	More people and a wider range of people will have engaged with heritage
Heritage will be better interpreted and explained	People will have changed their attitudes and/or behaviour	The local economy will be boosted
Heritage will be identified/recorded	People will have had an enjoyable experience	The local area/community will be a better place to live, work or visit
	People will have volunteered time	The funded organisation will be more resilient

### 3.3 Overall Archive Service outcomes

As part of the project development process, the Service developed a strategy map 2013-2023 in line with the University's then strategy map. The achievements of the Service during this period are noted below, all of which have been achieved either entirely through the project outcomes or underpinned by the infrastructure created through the project.

As a result of the project a full-time permanent post of Public Engagement Officer (grade 7) was created within the core staff of the Service, in addition to the full-time permanent post of Assistant Archivist (now grade 7) which was created in 2013 following the stage 1 development project.

<b>MISSION</b>	Delivering an inspiring information environment for the digital age	
<b>STAKEHOLDERS</b>	<p><b>Our audiences and stakeholders can expect:</b></p> <p>A wider and more diverse range of audiences engaging with the collections in wider and more diverse ways</p> <p>Stakeholders who trust and have confidence in a sustainable Service.</p>	<p>A better legacy of collections information &amp; knowledge making the collections more accessible</p> <p>Heritage collections which are preserved as a sustainable asset to survive into and benefit the future</p>

<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>AIMS</b></p>	<p><b>Stakeholders and their experiences</b></p> <p>A1. We will understand, connect with and inspire our audiences.</p> <p>A2. We will provide high quality facilities and services to enable our audiences to access collections in ways that make sense to them.</p>	<p><b>Heritage collections management</b></p> <p>A3. The heritage material we hold in trust is a gift from the past to the future. Collections will be secured, preserved and safeguarded against loss.</p> <p>A4. We will enhance our collections and develop them through pro-active management.</p> <p>A5. We will open up information about our collections to all who want to access it.</p>	<p><b>Organisational health</b></p> <p>A6. Sustainability will be at the heart of what we do and the way we behave.</p> <p>A7. Our Service will deploy and develop the skills and specialisms needed in today's digital world for managing and preserving information past, present and future.</p> <p>A8. We seek to fully realise equality of opportunity for our audiences and to reflect diversity in our collections.</p>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>ENABLES</b></p>	<p>E1. Complete the Activity Plan and develop sustainable programming <b>ACHIEVED</b></p> <p>E2. Develop and implement detailed and sustainable interpretation and digital access &amp; engagement strategies <b>ACHIEVED</b></p> <p>E3. Create and maintain the on-site visitor experience and facilities <b>ACHIEVED</b></p>	<p>E4. Implement the conservation management action plan <b>ACHIEVED</b></p> <p>E5. Develop and implement digital preservation and digitisation strategies <b>ONGOING</b></p> <p>E6. Create and maintain the storage environment in conformity with BSI PD5454:2012 &amp; PAS198:2012 <b>ACHIEVED</b></p> <p>E7. Complete the intellectual management action plan <b>ACHIEVED</b></p> <p>E8. Complete appraisal and management work for pre-2013 special collections <b>ACHIEVED</b></p> <p>E9. Implement and embed the collection development strategy <b>ONGOING</b></p>	<p>E10. Obtain Archives Service Accreditation <b>ACHIEVED</b></p> <p>E11. Develop and implement a marketing and promotion strategy <b>ACHIEVED</b></p> <p>E12. Continue to develop a workforce appropriate both in experience &amp; numbers <b>ONGOING</b></p> <p>E13. Diversify revenue streams in order to carry out the Services' responsibilities and plans <b>ONGOING</b></p>

Key Performance Indicators	Stakeholders and their experiences	Heritage collections management	Organisational health
	<p>1. Increased audiences both on-site and online using an increased range of collections <b>ACHIEVED</b></p> <p>2. Award of Customer Service Excellence <b>ACHIEVED</b></p>	<p>3. Increased long-term physical viability of material <b>ONGOING</b></p> <p>4. Increased long-term viability of digital material <b>ONGOING</b></p> <p>5. Conformity of new storage environment with PD5454 recommendations 95% of period <b>ACHIEVED</b></p> <p>6. 100% of collections held at March 2013 fully catalogued; collections accrued since March 2013 usually fully catalogued within 6 months of accession <b>ACHIEVED</b></p> <p>7. Special [printed] collections are focussed and reduced in bulk <b>ACHIEVED</b></p> <p>8. Collections are strengthened and Service developed as a world-class repository in collection content <b>ONGOING</b></p>	<p>9. Award of Archive Service Accreditation <b>ACHIEVED</b></p> <p>10. Increased usage at all levels of engagement <b>ACHIEVED</b></p> <p>11. Service meets professional standards and is financially stable <b>ACHIEVED</b></p>

## 4. Sustainability

### 4.1 Capital works

Maintaining the **facilities in Heritage Quay** has been incorporated into forward planning and budgeting of Computing & Library Services; this work includes redecoration of public areas, routine maintenance of systems such as the mobile shelving, and replacement of multimedia and computing equipment in line with the University's usual cycles, with redundant equipment to be disposed of in an ethically and environmentally approved manner as is normal practice.

Maintaining the repository environment, in addition to the major changes to secondary packaging achieved through the project and described in §2.1 above, are the key factors in securing the **long-term preservation of the heritage collections** including the conservation work also undertaken to repair individual items through the project. The University's wider Digital Preservation strategy will be applied to those audio-visual items preserved by digitisation as described in §2.1 above, to ensure that the digital records remain available in perpetuity. This project is underway in summer 2018. Other elements of this area of work, including conservation treatment of individual items and preservation digitisation, will be enhanced by resources secured through additional funding bids, for example research grants from the Arts & Humanities Research Council.

### 4.2 Activity plan

Some of the key areas of activity described above have been fully mainstreamed within the Archives & Records Management Service core team, which has been increased by the creation of the roles of Public Engagement Officer (1fte at Grade 7) and Student Helpers (0.5fte at Grade 2) and now stands at 5.5fte in total (of which 1.5fte are involved in Information & Records Management functions which were unaffected by this project). These areas are the **exploration and group space** (discussed at §2.4 above), **online activity** (§2.5), **marketing and communications** (§2.9), **resource discovery** (§2.10) and **using the heritage collections in the research room** (§2.12). Staff **training** and **service monitoring/evaluation** which had been previously undertaken before the project revert to mainstream activities (§2.11). The **University links programme** (§2.7 above) was undertaken by the Assistant Archivist, a core member of the team, and continues to be resourced. Elements of these areas of work, in particular resource discovery, will be enhanced by resources secured through additional funding bids and partnerships, for example research grants from the Arts & Humanities Research Council.

Elements of other areas of work have been transferred to other partners and arrangements as capacity in other areas has grown (often through this project). For example, responsibility for facilitating the rugby league programming group created through the **participation, volunteering and events** area of work (§2.8 above) has been transferred to project partner Rugby League Cares which is seeking to establish a national Museum of Rugby League and which has greatly developed its own capacity for heritage management and support of heritage volunteers within the game during the project lifespan. Heritage Quay continues to provide a venue for occasional rugby league heritage events as part of mainstream activity. It was anticipated that the local history programming group would be transitioned into the (separate) "West Yorkshire Archives Kirklees @ Heritage Quay" project, originally planned subject to funding to begin in summer 2018. However as this project did not begin within the planned timeframe, core team resource was focussed on delivering the exhibition and launch event for the "Huddersfield 150" commemoration in summer 2018 to mark 150 years of incorporation. Resource will then support the Discover Huddersfield partnership, which creates town trails, delivers a programme of walks and undertakes other activities "to highlight the magnificent history, beauty and heritage this town has to offer". Other elements of this area of work, including supporting partner events during the Huddersfield Contemporary Music Festival, have been mainstreamed.

It proved difficult to fulfil the **schools activities** as originally anticipated with the resources available and in the wider environment (discussed at §2.6 above). However Heritage Quay continues to work closely with the University's Schools and Colleges Liaison Service to host campus visits by schools. The learning resources created as part of the project will continue to be available on the My Learning website at least until 2022 (by which time changes to the National Curriculum may render them less relevant).

## 5. Summary of lessons learned

In a project of this duration and scale numerous lessons were learned. Taking an agile approach, many of the smaller lessons were absorbed and applied as the project went on, for example in the approach to participation and events, to preservation digitisation and resource discovery, and to marketing. The project team were encouraged to reflect and adapt practice whilst developing their skills and as the reputation and audiences for Heritage Quay grew. Opportunities provided by larger-scale service transformation and evaluation tools such as the annual assessment for Customer Service Excellence and Archives Service Accreditation (achieved in 2016) were also used to reflect on and learn from experiences in addition to the application of the project's evaluation framework and regular reporting to HLF. These lessons are detailed above in the discussion in section 2 and are summarised here.

### 5.1 Capital works to repair and conserve the heritage collections

5.1.1 Basic preservation measures applied to the whole collection have a major impact on longevity. Planning to expend resources on quality materials and on the human resource to apply them, as well as routine housekeeping regimes, has a significant impact and should continue to be carefully planned and costed.

5.1.2 Preservation Assessment Survey should be planned to be repeated in 5 years time to measure progress with the legacy collections and to ensure that appropriate preservation measures are systematically applied to material acquired after summer 2017 (when the last Survey was undertaken).

5.1.3 Preservation digitisation requires pro-active project management resource to manage mini-projects with an outsourced supplier. This should be fully scoped and costed in addition to the digitisation work itself, and implemented systematically in future projects.

5.1.4 Outsourced digitisation requires at least one day of staff time per project to quality check and upload the results. Again, this should be fully scoped and costed in addition to the digitisation work itself, and implemented systematically in future projects.

5.1.5 Although the use of photographic freezers was recommended, based on the results of a collection survey during the stage 1 development project, as more was learned about the collections and their usage the room originally designed for this purpose was subsequently reprioritised and repurposed in order to have a greater preservation impact on more material and on its retrieval by staff. Although the delay in kitting out the "freezer room" was as a result of lack of capacity, it later turned out to be advantageous. Any further major new preservation programmes should be phased to respond to a growing level of detailed information about the collections.

### 5.2 Capital works to create the facilities in Heritage Quay

5.2.1 Undertaking the design of the capital works following extensive audience consultation resulted in a space that met the requirements of the majority of users including the unanticipated large number of users hiring the Group Space for their own purposes. Minor modifications were made, chiefly installing acoustic curtains to improve the quality of sound. Continuing to solicit feedback from users pro-actively through Customer Service Excellence will help to ensure that the space continues to suit its users.

5.2.2 The high level of “other” usage of the space was not anticipated and reflects both the high quality flexible nature of the space and its bookability within the University outwith the regular timetabling system, in addition to the excellent customer service delivered by Heritage Quay staff to users. Consideration should be given to maintaining this flexibility whilst ensuring that the space is utilised appropriately.

5.2.3 Pro-active management of the multimedia hardware contract during the support and warranty period should have been fully scoped and costed. A schedule of regular pro-active maintenance and review should be implemented in conjunction with the CLS Audio-Visual team.

5.2.4 The dedicated project management resource for the construction which was originally planned should have been replaced rather than attempting to absorb it. Future capital projects should be designed and costed with appropriate construction project management resource.

5.2.5 A clear visual brand and identity made the space visibly “different” to the rest of the University estate and more welcoming to external visitors. The Heritage Quay brand including ® trade mark should be protected and continue to be closely controlled.

5.2.6 The collections move was originally planned to take place in advance of the launch of Heritage Quay, but delays in completion and handover meant that this was put back six months. Fortunately material could still be retrieved from the old locations as Heritage Quay is co-located on the same floor and with easy access. The state of the collections prior to the move (largely uncatalogued although with significant secondary repackaging having been completed) meant that a large quantity of resource would have been consumed up front in move preparations such as surveying and barcoding which was not warranted by the comparatively simple logistics and scale of the move; however, this best practice methodology should be followed for any future major moves, should these be required in future.

### 5.3 Activity plan - adult and community learning

5.3.1 The 18-month lapse between the audience consultation for the Activity Plan and beginning to deliver the Plan necessitated by the HLF two-stage application process meant that alternative modes of delivery had to be developed or areas of work originally envisaged not pursued. Ideally audience research and consultation, and delivery of activities, should take place closer in time. Where plans are made based on consultation which is more than 6 months old, resource should be planned to update the results of previous consultation.

5.3.2 Being able to make an agile response to the changing environment described in 5.3.1 above meant that the team was able to capitalise on opportunities and respond to emerging needs during the project. Pro-active consultation, ongoing evaluation and reflection should continue to be employed around activities and events.

5.3.2 The University discovered the unexpected contribution of its archive service to its emerging public and community engagement agenda during the project. Powerfully articulating and communicating the strategic contribution within the organisation using a virtuous circle of success should be continued.

## 5.4 Activity Plan – exploration and group spaces in Heritage Quay

5.4.1 High quality exhibitions involving external curators demand a high level of resource and meticulous planning and scheduling. Enough resource should be allocated in planning for new exhibitions.

5.4.2 During the project exhibition guidelines were developed to capture best practice and to set standards for the use of the exhibition cases by others; these were tested during 2018 during an exhibition curated by second year students for an assessed module and found to work well. Exhibitions should continue to meet the agreed standards for content and presentation.

5.4.3 A launch event or private view should be held for all exhibitions as this created “buzz” around the new exhibition as well as celebrating the work of the curators. A modest budget for flyers and the launch event should be planned for the future.

5.4.4 It proved difficult to evaluate the extent to which an exhibition impacted on take-up of other areas of the Heritage Quay offer, such as events or use of the research room although anecdotally progression was noted and those exhibitions which had accompanying or similarly themed events were felt to add value (and vice versa). A lack of capacity as well as wanting to avoid overloading casual visitors contributed to this. Consideration should be given to further “signposting” from the exhibition to other aspects of the offer (and vice versa), and to evaluating this further.

5.4.5 External hires should continue to be served by the Events Student Helper, with sufficient training and support continuing to be given to maintain a high quality service.

5.4.6 Heritage Quay should continue to be available for a wide range of University events to maximise opportunities for access to the collections, and should remain outside the University’s timetabling and room booking system. This should be kept under review to ensure that the resources required to manage and administer bookings from outside the service is proportionate.

## 5.5 Activity Plan – online activity

5.5.1 In a fast changing online world inevitably plans to use certain platforms (eg. Pinterest) were superseded by audience preferences over the course of the project (eg. Instagram). Taking advantage of the larger scale of resources elsewhere in the University to amplify content and maintain a watching brief on the environment meant that the team was able to remain agile and respond to developments online; this should be continued.

5.5.2 Audiences find the Heritage Quay bespoke online collections search tool friendlier and easier to use than the out-of-the-box collections search access package CalmView. However the bespoke nature of the development meant that there was no ongoing support once the developer had left the company, although the University was able to brief another developer in order to make changes to the Wordpress plug-in developed for the online search tool. The stability of the bespoke tool should continue to be monitored as well as the future development of CalmView.

5.5.3 The combination of using the preservation exemption of the Copyright Designs and Patents Act 1998 together with the very large size of the resulting digitised music files means that digital material is not available to access in full off the premises. Within Heritage Quay a coherent solution has not been found to making digitised content directly available to researchers without staff intervention. The technical possibilities offered by CalmView within the University’s firewall to make

digital material available in a way which also protects intellectual property rights should continue to be explored.

5.5.4 Wakelet should continue to be used for the near future to make exhibitions available online, and the resulting online content should be integrated into future marketing and communications activity. Resources should continue to be planned for the uploading of content to Wakelet.

5.5.5 The service should continue to work with Sound and Music pro-actively to explore the development of digital aspects of the British Music Collection in its online and physical forms.

## **5.6 Activity Plan – schools activities**

5.6.1 Resource should be allocated to research and plan further promotion of the learning resource films available through My Learning and YouTube, and undertake a specific evaluation at the end of the five year My Learning hosting period.

5.6.2 The service should continue to actively support the Schools and Colleges Liaison Service and to monitor the impact of the Holocaust Learning Centre (opened September 2018) on school visitors on campus and on the University's provision to schools.

## **5.7 Activity Plan – University links**

5.7.1 The service should continue to embed direct contact with the heritage collections in as wide a range of taught undergraduate and postgraduate modules possible, working closely with academic teaching colleagues.

5.7.2 The service should continue to develop and respond to opportunities to develop early career researchers to base their research on the heritage collections.

5.7.3 The service should continue to develop partnerships with academics at a more advanced stage of their research, including supporting funding applications and other projects using the heritage collections and/or facilities.

5.7.4 / 5.8 2 The University should continue to develop the newly created role of Public Engagement Officer and to build on the relationships and experiences established and explored through the project to contribute to the realisation of the University's Public Engagement Strategy 2016-2020.

## **5.8 Activity Plan – participation, volunteering and events**

5.8.1 The programming groups made a significant contribution to the events programme at Heritage Quay as well as providing a wide range of benefits to group members and to the development of the heritage agenda in rugby league and in providing an additional or new focus for local history groups including diversifying relationships in other local history fora. The service should continue to support but not to facilitate the rugby league group as Rugby League Cares develops its plans for the museum of rugby league to be based in Bradford. The service should continue to support but not facilitate the local history group as plans develop towards marking the centenary in 2020 of Huddersfield as "the town that bought itself".

5.8 2 / 5.7.4 The University should continue to develop the newly created role of Public Engagement Officer and to build on the relationships and experiences established and explored

through the project to contribute to the realisation of the University's Public Engagement Strategy 2016-2020.

5.8.3 The service should continue to work with organisational partners including the Lawrence Batley Theatre, Rugby League Cares and Sound and Music to develop projects transcending the heritage collections.

5.8.4 The service should continue to support community partners to build capacity and further their strategic purposes by providing training, facilities and other support, where possible in-kind.

### **5.9 Activity Plan – marketing and communications**

5.9.1 The service should continue to produce a termly e-newsletter with highly relevant and quality content.

5.9.2 Marketing and communications activities around key milestones, such as events, exhibitions, newly catalogued materials and other aspects of the offer should be reviewed, planned and appropriately resourced in future.

5.9.3 The distinctive Heritage Quay brand and trademark should be maintained, and reviewed in three years.

### **5.10 Activity Plan – resource discovery**

5.10.1 The service should continue to review priorities for collections management activities at least biannually, and to utilise whole service collections-focussed periods to undertake larger-scale collections management activities.

5.10.2 The collections management requirements of new collections should continue to be pro-actively explored at the pre-acquisition stage, and external funding sought where appropriate.

5.10.3 A pro-active collections development strategy should be researched and implemented, and reviewed with the collections development policy by summer 2021.

### **5.11 Activity Plan – training and evaluation**

5.11.1 Individual personal and professional development, as well as team development should continue to be managed through the appraisal process and through regular facilitated team away days.

5.11.2 Ongoing service evaluation should be continued through the Customer Service Excellence framework and re-accreditation for Archives Service Accreditation. Other local measures including collections access and management measures should be continued, with frameworks reviewed within 3 years.

5.11.3 External consultancy should be appointed for the summative evaluation of any future projects of this scale.

5.11.4 Whilst the project pre-dates HLF's recommendations to use the logic model, it was found to be helpful to apply logic models retrospectively in evaluation and to plot the intended outcomes

whilst considering the project inputs, activities and outputs accordingly. The use of logic models for future projects should be continued at the planning stage.

### 5.13 Project Management

5.13.1 The project management methodologies established in the project management plan were found to be largely robust and effective, and should form the basis for any future projects of this scale.

### 5.14 Reflections for the wider archives sector

Whilst many of the lessons learned were specific to this project and context (and are neither new nor unique to this project or service), this section of the report considers wider trends and structural approaches which are of relevance to the wider archives sector within the context of the broader heritage and cultural sector. It particularly focusses on people and communities, for which the term “audiences” is used below.

The project found that audiences respond to attractive, innovative events which offer a fun experience. In common with the recent research from LaPlaca Cohen in the US context the project found that audiences value events which transform their perspectives and broaden horizons (corresponding with the “attitudes and values” area of the Inspiring Learning for All Generic Learning Outcomes which are commonly used within the sector). Opportunities to build communities by bringing people who may not think they have much in common together, as well as to foster empathy, are also valued (“stronger and safer communities” in the Inspiring Learning for All Generic Social Outcomes). Audiences have a variety of other important reasons for participating in archives experiences. For example, all things “new” seem to be critical drivers for audiences, who seek out an analogue, unique experience as a critical element of their personal development. This may seem ironic in the context of heritage, which is not “new” per se, but means a sense of discovery, having a different experience, or learning something they did not know. This desire seems to be consistent across generations. It is the creativity of the approach rather than a need for extensive resources which seems to matter for archive experiences.

Whilst audiences are driven to attend heritage activities for a variety of different reasons a key motivator, however, is unanimous: having fun. Archives organisations may consider “fun” a distraction from their missions, particularly in the current climate, but audiences believe they are not mutually exclusive. “Fun” needs to be better defined and understood in relation to archives experiences, but it is an essential—and widely desired—element of them. Whilst the sector often considers “wellbeing” in relationship to health (physical and mental), it is often in addressing impaired or poor health rather than considering fun and enjoyment as desirable and beneficial in its own right. Fun and playfulness is a concept little explored in the sector, which tends to focus on the intellect, but is an important area of wellbeing. Fun can help to build kindness, team spirit (not simply restricted to the paid “staff team” but among those participating in a particular experience at a particular time) and also build resilience in difficult times. This is an area in which the archives sector can learn much from the museums sector and the wider cultural and arts sector.

This approach calls for emotional intelligence and empathy, which is also needed for improving accessibility and inclusion. For example, people with disabilities are much more likely than those without to say that they do not attend heritage and cultural activities because they had a negative experience last time. An empathetic approach to accessibility increases inclusion and diversity, addressing the barrier to participation of “it’s not for someone like me”. Historic collecting activity, cataloguing practices and other organisational structures can perpetuate exclusion from archives.

Archives – both collections and services - can be very white, male, ableist, colonial, classist, hetero- and gender-normative. For those who don't inhabit those identities, they can feel like marginalising places and experiences. Members of privileged groups, including those who can be seen as professional gatekeepers, play a vital role in crafting welcoming places, activities and collections. By treating people with dignity, by interrogating ones own biases and the biases inherent in the collections, spaces and ways of doing things, by avoiding making assumptions, by looking beyond and stepping beyond unspoken norms, and by engaging in microaffirmations (described by US librarian April Hathcock as “those small acts of encouragement and solidarity that show a marginalized person that you acknowledge and respect their belonging”) archive services can acknowledge, value and celebrate difference. Archive services can also work against the oppression that exists in society and attempt to mitigate its effects, eventually equalizing the power imbalance in communities from the individual to the institutional to the cultural level.

Generally audiences believe that archives are a positive force. But in this complex moment when the value of archives for their own sake is not a given, it is up to organisations to powerfully articulate and deliver on their essential purpose and impact—an effort that I hope these reflections on and detailed evaluation of the Heritage at Huddersfield project will help support.

## 6. Acknowledgements

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### (Inter)national standards for archives sector

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- British Standards Institution EN16893 *Conservation of Cultural Heritage – New Sites and Buildings intended for the Storage and Use of Collections* (2017) and predecessor standard PD5454:2012 *Guidance for the storage and exhibition of archival materials*
- British Standards Institution BS4971 *Conservation and Care of Archival Collections* (2017)
- Happy Museum Project *Manifesto* (published at <http://www.happymuseumproject.org/>)
- International Council on Archives *International Standard Archival Description (General)* 2<sup>nd</sup> edn (ICA 2000)
- International Council on Archives *International Standard Archival Authority Record for Corporate Bodies, Persons & Families* 2<sup>nd</sup> edn (ICA 2003)
- International Council on Archives *International Standard for Describing Functions* (ICA 2007)
- National Council on Archives *Standard for Access to Archives* (NCA PSQG 2008)
- The National Archives *Archive Service Accreditation* (revised 2018)
- The National Archives *Archives Unlocked* (2017) available at <http://www.nationalarchives.gov.uk/documents/archives/Archives-Unlocked-Brochure.pdf>

## **Organisational**

University of Huddersfield Strategy Map 2013-2018

Computing & Library Services Strategy 2013-2018

Archive Service Strategic Plan 2013-23

Heritage Quay Collections Management Policy 2018 (and previous policies 2011 and 2014)

Heritage Quay Collections Development Strategy

Heritage Quay Collections intellectual management action plan

Heritage Quay Volunteering policy

Heritage Quay Digital Engagement Strategy

Heritage Quay Interpretation plan

Heritage Quay procedures

University of Huddersfield Computing & Library Services Customer Service Excellence annual service standards, CSE assessment submission and reporting

Information & Records Management and Archives Annual Team Plans

## **Heritage @ Huddersfield Project**

### **R2 application:**

Application form

Supporting documents:

1. Activity plan (Janice Tullock Associates 2013)
2. Images
3. Heritage Quay “fly through” (Darnton EGS 2013)
4. Costs
5. Cashflow forecast
6. Project timetable
7. Project management plan
8. Design specifications (Darnton EGS 2013)
9. Multimedia Implementation Plan (Wide Sky Design 2013)
10. Strategic Management & Maintenance Plan
11. Collections Management & Maintenance Plan (Elizabeth Oxborrow-Cowan Associates 2013)

### **Commissioned during the project:**

Heritage Quay branding and visual identity (White Space 2014)

Communications plan (White Space 2014)

Evaluation consultancy report (Creative Cultures 2015)

Preservation Assessment Survey (Library & Archive Surveys with Sussex Conservation Consortium 2017)

### **Formative evaluation during the project:**

Project Evaluation Baseline year one January 2016 (Submitted to HLF June 2016)

Project Evaluation mid-point report September 2016 (Submitted to HLF October 2016)

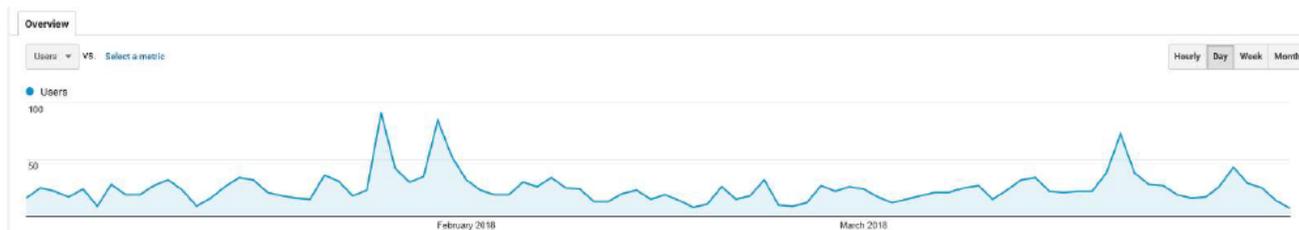
## Appendix 2 Digital dashboard (produced quarterly)

From January 1 – March 31 2018 Heritage Quay had 1,889 (^) people use its website.

Those users viewed 15,772 (^) pages.

Visitors spent an average of 3:17 minutes (^) using the website, viewing an average of 6.36 (^) pages per visit.

1,117 (^) people visited Heritage Quay in person for events and 56 (v) as researchers.



Total followers  
**259** (^)  
Top posts  
[2 posts during period]  
Referrals to website 3% (^)  
Reach 161 (v)  
Engagements 22 (v)



Total followers  
**1,248** (^)  
Top tweets  
Edit-a-thon  
BMIC 50/exhibition promo  
Easter closure  
Filming event/broadcast  
Referrals to website 1% (v)  
Impressions 22.1k (^)



Klout score  
**48** (^)



TripAdvisor Rating  
★★★★★



Total followers  
**107** (^)  
Top posts  
[no posts during this period]  
Referrals to website 0%



Total subscribers to e-newsletter  
**994** (^)  
Opened 41% (=)  
Clicked 13% (=)

^ - increase on last report  
= same as last report  
v decrease from last report

Industry averages (mailchimp)  
"Arts" opened 27% clicked 3%  
"Events" opened 21% clicked 2%

### Appendix 3 Summary evaluation report, Learning & Engagement Officer

Evaluation overview linked to Activity Plan Objectives		
Activity Plan Objective	Schools Activity	Achieved/part/not
Resources to support the school curriculum  <i>*need to draw out more explicitly in pre activity information</i>	Chol Drama Workshop	Met
	Discovery Visits	Met
	Micro Exhibition	Met
Resources to support school improvement needs, e.g. boys' literacy  <i>*Include question in evaluation</i>	Chol Drama Workshop	Not Commented Upon
	Discovery Visits	Not Commented Upon
	Micro Exhibition	Not Commented Upon
Increased awareness of heritage collections and relevance to the curriculum	Chol Drama Workshop	Part Met
	Discovery Visits	Met
	Micro Exhibition	Met
Increased confidence of teachers re. the use of heritage collections to support their teaching	Chol Drama Workshop	Met
	Discovery Visits	
	Micro Exhibition	Met
Further develop Huddersfield Giants Heritage project	Chol Drama Workshop	Not Met
	Discovery Visits	Not Met
	Micro Exhibition	Not Met
Increased awareness and aspirations re. university  <i>*ask more explicit evaluation question</i>	Chol Drama Workshop	Not Commented Upon
	Discovery Visits	Met
	Micro Exhibition	Met
Increased opportunity to use historical enquiry skills  <i>*more prescriptive direction required at outset</i>	Chol Drama Workshop	Met
	Discovery Visits	Met
	Micro Exhibition	Part Met
Increased opportunity to use composition skills	Chol Drama Workshop	Not Met

<i>*no musical element to activity</i>	Discovery Visits	Not Met
	Micro Exhibition	Not Met
History and Music Curriculum support	Chol Drama Workshop	Part Met (History)
	Discovery Visits	Met (History)
	Micro Exhibition	Met (History)

### **MICRO EXHIBITION ACTIONS:**

Be more prescriptive with future activities

Ask for contact details of individual teachers

Draw attention to the assembly element of the SoW and suggest that the teachers use this as a starting point

Provide pre cut mounts for display

Put the exhibition up for longer

Use comments to highlight NC links for other schools

### **CHOL DRAMA WORKSHOP ACTIONS:**

Emphasise the ways in which the workshop meets curriculum requirements.

Develop the format and translate to other subject areas, however we need to ensure that they are supported by, inspired by and relate to, heritage collections.

### **DISCOVERY VISIT ACTIONS: ALL COMPLETE**

Speaker to Workers' Educational Associationr a microphone

Campus tour to be more focussed on single aspect

Pass feedback to student Ambassadors and HQ team who made such a positive impact

**ALL ACTIVITIES:**

Highlight NC links and objectives of individual workshops in publicity material

More detailed activity information given beforehand

Obtain individual contact details for all teachers

Use teacher comment in PR

## **Appendix 4 Detailed evaluation report, Participation & Engagement Officer**

A version of this report (without the Activity Plan cross-references) is publicly available from <http://eprints.hud.ac.uk/id/eprint/34353/>



# PARTICIPATION AND ENGAGEMENT AT HERITAGE QUAY 2014-2017

Between 2014-17, a programme of **free** events, activities and workshops was delivered at the archives of the University of Huddersfield as part of the Heritage Lottery-funded Heritage Quay project.

Coordinated by the HLF Participation and Engagement Officer (P&E Officer), the programme aimed to bring new audiences into the service to explore the collections in innovative ways. The programme was targeted at three interest areas, **local history**, **music** and **rugby league**, reflecting known strengths of the collections. Activity was split into adult learning, public events and more specific festival-based programming, with no other limitations on the ages or backgrounds of potential participants. Large parts of the programme were developed with consultation groups to ensure that the audience's interests were central to the activity.

This report outlines what took place during the project, with the successes, challenges and learning to take forward. It aims to show that P&E activity in archives can be dynamic, innovative and exciting, whilst still serving audiences and collections.





# CO-PRODUCING PARTICIPATION AND ENGAGEMENT

The Heritage Quay participation programme was delivered by the P&E Officer, with support from the rest of the Heritage Quay team. Its core component was a public events programme developed with three voluntary co-creation/programming groups, led by the P&E Officer. Each group covered one of three key themes; Rugby League, Music and Local History.

The three programming groups met two-three times a year at facilitated meetings with the P&E Officer to work on the development of the public events programme. Groups were made up of academics, depositors, partners and enthusiasts, with a slightly different rationale for each group's membership.

Group members gave their time for free or as part of their professional duties. As well as contributing to the public programme, the groups were also consulted on or helped deliver other elements of the P&E Programme. Over the course of the three years, some strong and effective relationships were developed with the members.

## Programming Groups membership

Members of the programming groups came from places across the north. They were reasonably evenly split between Kirklees (17), the rest of West Yorkshire (14), and the wider North (16) with a couple of members from elsewhere. The Rugby League Programming Group (RLPG) was a large factor in this spread, although it should be noted that some members of the Local History Programming Group (LHPG), representing Kirklees organisations, actually lived in other parts of Yorkshire.

Anecdotally, attendances at programming group meetings were mostly from people who represented Kirklees organisations and partners (although they didn't necessarily live in Kirklees). Meetings for the LHPG and Music Programming Group (MPG) took place during or just after usual working hours, whereas RLPG meetings were on weekends. Membership of the groups changed over the three years as new members joined and others left. Occasionally post holders at partners changed. Where two representatives of an organisation both made substantial contributions they have both been counted as participants.

Some participants couldn't or didn't attend meetings but either contributed via email or expressed interest in staying in the loop via e-communications.

There was also a reasonably even split in ages over/under 60. 16 members of the programming groups completed detailed evaluation forms which will form the basis of the evaluation in this report. Of those who completed forms seven were under 60 and nine over 60.



# CO-CREATED PROGRAMMING

## Rugby League Programming Group



15



6

10

events

+ 2 Heritage Forums



63%



30%

330

event attenders

Amazing event, brought back a lot of great memories

For us families this was very special and will long be remembered

Thank you for organising the brilliant Indomitables session today along with Simon. I thought I knew a little bit about the tour but learned so much from the contributors.

Everyone very friendly...rugby league family (was mentioned several times)

Enjoyable, informative and important that RL memories should be preserved very interesting- better than expected

Positive Comment 80% Negative Comment 10% Mixed Comment 10%

## Rugby League Programme evaluation

The Rugby League Programming Group was comprised of representatives of as many clubs, foundations, organisations and individuals in the sport as possible. The majority of the membership was Yorkshire-based, but there was a significant amount of Lancashire-based interest too. Unfortunately, and probably for geographical and historical reasons, there were no members representing clubs from Cumbria, the Midlands, or Greater London.

### Meetings and attendance

At the first meeting, the following aims were given by the group, which formed the remit for programming:

- To illuminate collections in interesting ways
- Find ways to signpost people from the HQ collection to other resources/projects
- Set up a network for RL heritage people
- Important to share RL stories
- Get RL fans in
- Bring parts of different collections together
- Capturing what's in private collections
- Enthuse Clubs about their heritage
- Plan talks and activities
- Start local – build from there
- Encourage more use of the archives for detailed research on aspects of RL history.

Over the course of the project, meeting attendance declined, likely due to other commitments and the travel involved and because networking needs were being met at events. However, members still contributed via email and by using their contacts to develop the programme and market it. The core of RLPG members were consistently supportive and helpful.

The events run during the project were;

**RL History Day: New Zealand on Tour** Collections and presentations marking a modern tour

**Rugby League Photo IDing** Attendees helped to identify information in archive collections

**Legends in Conversation** Chance to hear from notable ex-players.

**Celebrating the Indomitables** Telling the story of the 1946 Great British Lions tour.

**Beef, Brains, Brawn and Muscle** An insight into modern physiology theory and practice, with archival input.

**Four Nations History Day** Inspired by a 2017 tournament. Talks and collections on display.

**Old Haunts** A look back at old clubs and grounds through talks and collections.

**Women RL** Female speakers sharing their experience in the game, linked to International Women's Day.

**Challenge Cup 120** An event to mark the 120th anniversary of the Challenge Cup.

**RL100** Final event, bringing different collections together.

## Successes

The programme consistently delivered interesting and engaging events based on significant historical sporting moments, and the programming group were able to provide their own knowledge, expertise and contacts to help provide the content, either through speaking at events (or inviting others to), displaying collections and marketing. The average attendance of 33 was positive in the context of a long season (February-November) which took place on weekends (thus impacting audience availability) and general levels of interest in the history of the game. Many of the programming group attended the events as participants which demonstrated that they were able to put on activities for them and there was a large element of networking involved in attending. The programme shared a great many stories and collections.

The highlights were;

**Celebrating the Indomitables** This event in 2016 shared a significant rugby league story, working closely with the families of former players and the rugby league heritage network. Feedback from attendees was excellent and there was an emotional atmosphere throughout.

**Photo IDing** This event was trialled at a Heritage Forum and proved popular. Attendees were invited to help identify mystery photographs. The event was very popular and hundreds of archival documents were identified, aiding research and cataloguing.

## Challenges

The largest challenge associated with this strand was identifying and appealing to ordinary fans. A lack of support from the local team and perhaps a lack of appreciation of the sport's heritage locally created barriers to engagement that were difficult to overcome. A corollary of this was difficulty in marketing to those fans directly. Work was done in local media, through organic and paid social media and by attempting to promote through foundations and clubs but to little effect. The events programme never seemed to produce an organic word-of-mouth which may have overcome some of these challenges. Geography was an additional factor. Due to travel times there was a limited audience who could attend spontaneously.

Finally, this strand had the most traditional programme of the three, with most of the events featuring a combination of talks and archival displays. In many ways, this was due to the collections themselves—there was less opportunity to be as creative with them perhaps, but the project didn't push hard enough to be innovative.

<http://www.examiner.co.uk/sport/gallery/heritage-quay-welcomes-former-stars-10862509>

<http://www.examiner.co.uk/sport/rugby-league/news/event-not-missed-huddersfield-giants-12634512>

<http://www.examiner.co.uk/news/west-yorkshire-news/rugby-stars-years-gone-help-10862067>

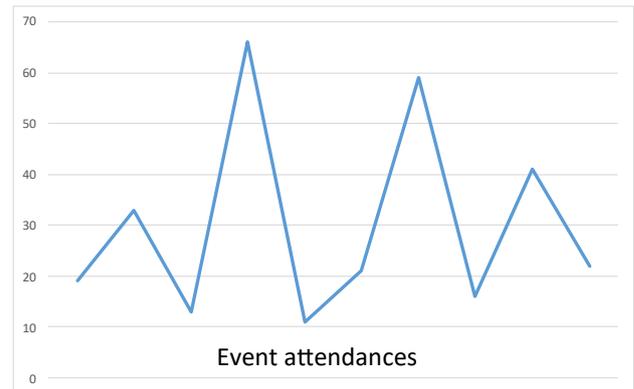
<http://www.thetelegraphandargus.co.uk/>

[news/14523397.Do\\_you\\_know\\_a\\_Bradford\\_Northern\\_player\\_who\\_was\\_a\\_member\\_of\\_The\\_Indomitables\\_squad\\_of\\_1946/](http://www.thetelegraphandargus.co.uk/news/14523397.Do_you_know_a_Bradford_Northern_player_who_was_a_member_of_The_Indomitables_squad_of_1946/)

## Year-on-year development and lessons learnt

Event attendance was mixed, with no fixed trends across the two years. It was also difficult to link attendance levels to specific marketing approaches or content. The most successful events, Indomitables and Old Haunts, were organised and promoted differently. The audience was almost exclusively adults, with a majority 60+.

The rugby league programme probably required more dedicated marketing time and investment than was possible on this project. The lack of permanent rugby league displays also made it difficult to fully brand Heritage Quay as the home of rugby league history and build a more general audience.



## Findings from the Programming Groups evaluation

Five members of the RLPG completed final evaluation forms. This number was low in part due to a lack of attendance at the end of project celebration in September 2017.

From the completed forms, all respondents felt that their voices were heard. 3/5 had attended training that they found useful. Many had attended events run by the RLPG, two had been to all of them and generally the programme met their interests, with scores of 9/10 or 10/10 where given. Responses also suggested that those in organisations had benefited from networking opportunities. Feedback about Heritage Quay in general was also excellent, as was proof of improved collections knowledge.

## Next steps

At the completion of the Heritage Quay project, the organisation Rugby League Cares were working towards a HLF application for a rugby league museum to build on the development work done at Heritage Quay. The programming group may continue to advise on and contribute to the sharing of the sport's heritage through this initiative.

## P&E Officer reflections

There were some amazing moments during the rugby league programme and many opportunities to showcase and tell stories with our collections. It felt worthwhile providing a space for rugby league heritage enthusiasts to share their knowledge and socialise. The programme was less innovative than the other programming groups but this was partly due to other parts of the activity plan - for example, rugby league-inspired family activities were covered elsewhere. The programme aimed to bring in audiences with high-profile ex-players, but this didn't work that well. A solid narrative about an event, coupled with concerted peer-to-peer marketing had more impact.



Celebrating the Indomitables



Beef, Brains, Brawn and Muscle



Challenge Cup 120



Four Nations History Day



New Zealand History Day



Challenge Cup 120



League Legends in Conversation



Rugby League History Day

# Rugby League Photo Iding



# Women in Rugby League



Challenge Cup 120

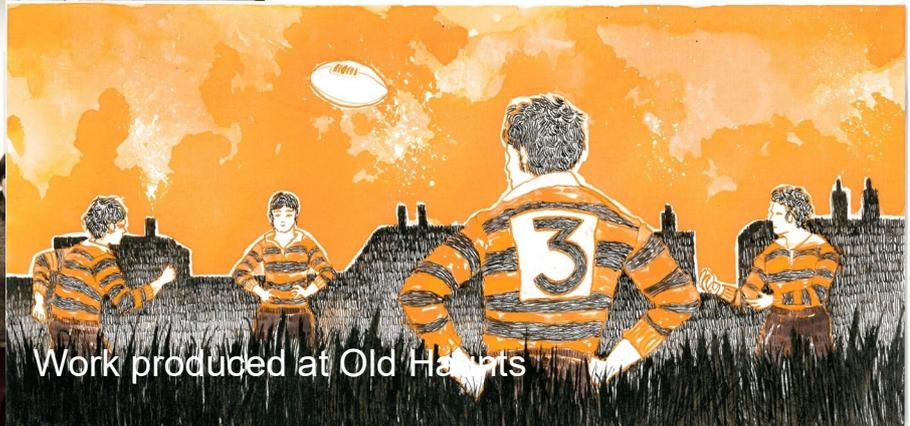


Heritage Quay RL100

# Professor Tony Collins



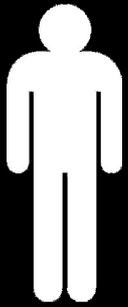
RL100



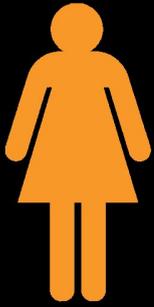
Work produced at Old Haunts

# CO-CREATED PROGRAMMING

## Music Programming Group



4



8

11

events

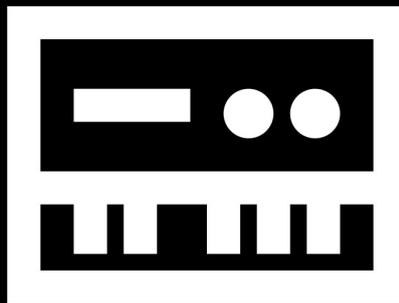
396

event attenders



1 event

early music



7 events

contemporary  
music collections



3 events

British Dance  
Band

The experience was so fun and inspiring

Something different with many interesting parts, really enjoyed the sayance [sic] and the story telling. The film was amazing but the highlight was the live score

Absoloutely excellent- Great space and facilities and v friendly staff!

Musical brunch - informative. Songwriting - fun. Haydn Wood recital - pleasant

## Music Programming Group evaluation

The Music Programming Group featured a mix of depositors, academics and enthusiasts. This was the smallest programming group with an even smaller, committed core. A major recruitment issue was that there were less organisations to contact and interact with than local history or rugby league. Attendance at meetings remained reasonably steady but there was less engagement remotely.

At the first meeting, the following aims were given by the group which formed the remit for programming:

- Knowledge exchange between academics and audience
- Should be about people coming to appreciate BMC [British Music Collection] and education
- Open up BMC to people. Graphical elements should be there to be explored
- Bringing different collections together
- About to deposit his archive of popular music of the 1920s-1940s so wants to use that + have record recitals
- Academics talking to local communities/ public and scholarly interaction
- The collections are something for town to be proud of and should be promoted
- Interested in the choirs and brass bands of the area and would like to find ways to get them involved

The events were;

**Introduction to the Music Collections.** A general event showcasing the collections.

**Dangerous Moonlight:** A screening of the wartime classic, whose score is in the British Music Collection. 1940s-style performer sang live after the film.

**Hardcore Classical** A light-hearted and interactive look at some of the more extreme pieces in the BMC.

**Cutting a Record** Inspired by the vinyl holdings in the archive (particularly the experimental techniques in the British Dance Band Collection). Recording studio in the research room and one-off pressing of recordings made for participants. Delivered in partnership with the School of Computing and Engineering.

**Conducting Day** Introductory workshops for young people using BMC content. Trainee conductors from the RNCM working with music student ensembles.

**The Cabinet of Dr Caligari** Halloween event, silent film with live score from BMC.

Specially assembled orchestra and line up of magicians organised and featuring members of staff and students from the School of Music, Humanities and Media.

**YSWN: IWD** Partnership event with Yorkshire Sound Women Network inspired by female composers in our collections. Hands-on activities and gig.

**Cutting a Record II** Repeat of event from 2016. Used School's music studios instead of research room (to support recruitment).

**Speakeasy** Music experience using the dance band collection. Live band, period-appropriate cocktail bar. Linked to academic conference - speakers shared their research by contributing to the event as performers.

**Yorkshire Music Festival** Culmination weekend featuring creative and music workshops and performances of music by Haydn Wood (in collection).

## Successes

The music programme delivered a vibrant and diverse range of events over the course of the project, with some interesting elements and partnerships which gave it greater impact and reach. Following a steady start, the programme found some successful approaches to engaging people with the contemporary classical content in much of the collections, a description which did not necessarily have wide appeal.

Despite some initial lower numbers, the MPG was not disheartened and was willing to consider and back interesting ideas. This was rewarded with some much better attended and innovative events in the second year of activity (project year three). Attendances were as follows:

**Y2 15-13-11-26-12**

**Y3 47-67-36-41-138**

There were many highlights in the MPG programme, but the Cabinet of Dr Caligari probably best reflected the energy and approach to programming. With a live ensemble, it took advantage of Heritage Quay's acoustics. It also provided the audience with an opportunity to experience a score from the collection that would not usually be played. The sense of theatre created by having live magic (in partnership with students and researchers) captured the ambition of the MPG programme too and demonstrated archival programming could help academic impact.

More broadly, feedback from event attendees was excellent, even when numbers were lower than hoped.

## Challenges

The relatively niche appeal of the collections and the lack of a strong network of local groups and fans were the biggest challenges. Related to this was the small programming group which again limited available collaborators and marketing opportunities. This was countered somewhat by the enthusiasm and interest of the MPG in being active participants.

These challenges were partly addressed by finding willing collaborators to bring audiences with them such as the Yorkshire Sound Women Network (two members were in the MPG).

An additional challenge was a lack of specialist knowledge in the Heritage Quay team and it is likely that the programme failed to make full use of the collections because of this.

## Press coverage

<http://www.examiner.co.uk/news/west-yorkshire-news/musicians-cut-tunes-vinyl-record-11254495>

<http://www.examiner.co.uk/whats-on/music-nightlife-news/bands-can-record-vinyl-free-12908461>

## **Year-on-year development and lessons learnt**

The first year of activity for the MPG was really challenging. With a lack of conduits for marketing and issues with content the programme felt a little underwhelming compared to the other two. However, the MPG generated a good range of potential ideas to choose from which helped with selection in 2016-17. A change in focus to select specific workshops, audiences and working on experiences all helped. The second year was also delivered with a range of partners who all brought audiences and expertise.

## **Findings from the Programming Group evaluation**

Four members of the MPG completed evaluation forms - representing perhaps the most active members of the group across the three-year programme.

All members reported that they felt their voices were heard. The average score for the programme meeting their interests was 7/10 (three responses) but the average attendance was 2.5/10 (four responses, two of 0) - partly due to the availability of the PG members. All expressed high satisfaction with their experiences and Heritage Quay and enhanced collections knowledge. The four respondents had knowledge of at most one collection at the start of the project, but knew at least something about all the music collections by the end. Three respondents felt the project helped their organisation achieve its own goals.

Some quotes from participants:

### **Thoughts about Heritage Quay/staff:**

“Very proud of the University of Huddersfield”, “Dave was a very welcoming, enthusiastic and energetic host/facilitator for the groups/events and it wouldn't have worked without him.”

“Heritage Quay is an inspirational space, and it has entirely changed my preconceptions about what an archive centre can be.”

### **Thoughts about the project:**

“A privilege to be involved.” “Thank you for everything!”

## **P&E Officer reflections**

The music programme was one of the most challenging parts of the P&E project. The first year of activity suffered from the misconception that there would be a readymade audience interested in content about contemporary classical music. Once the programme became more nimble and creative it delivered many highlights, giving people the opportunity to have fun and have creative and musical experiences. The MPG activity also proved the benefits of partnership work with colleagues in the University, setting up rich working relationships which can be continued into the future.



Cutting a Record (2016)



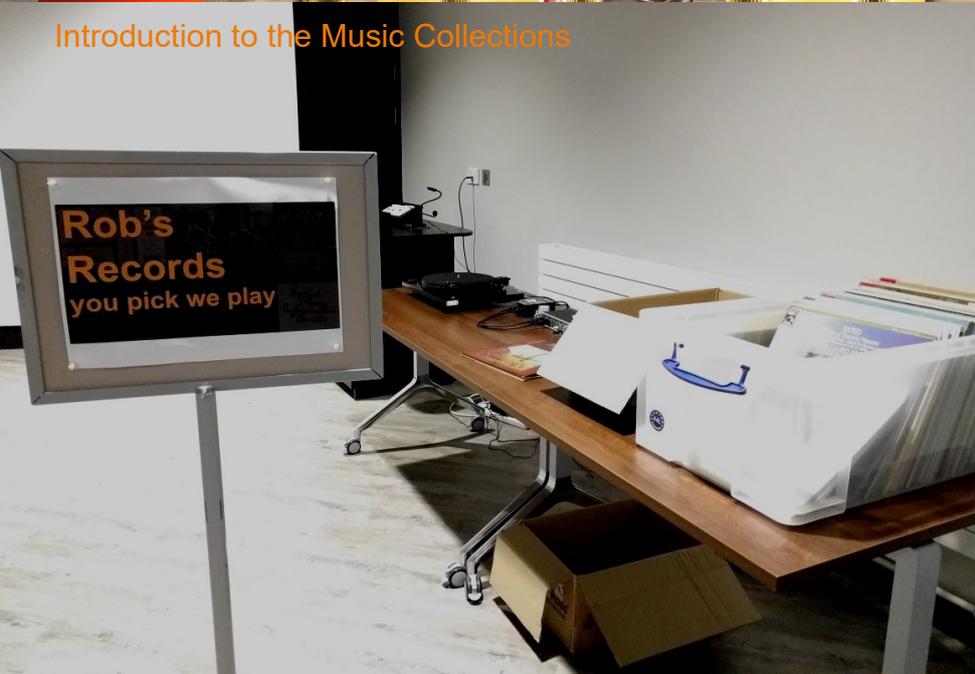
Conducting Day



Speakeasy



YSWN:IWD



Introduction to the Music Collections



Yorkshire Music Weekend



Yorkshire Music Weekend



Cutting a Record (2017)



Hardcore Classical



Yorkshire Music Weekend



The Cabinet Dr Caligari



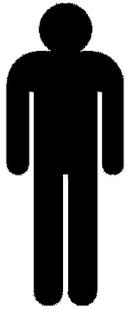
Dangerous Moonlight



Yorkshire Music Weekend

# CO-CREATED PROGRAMMING

## Local History Programming Group



9



7



17

orgs

12

events

602

event attenders

Enjoyed - good to see the local groups - check out the latest publications - didn't expect lunch too - THANKS. **Heritage Quay History Fair**

Excellent- entertaining and informative. **Speaking Yorkshire**

Please, please can we have another maps day? Well done everyone! **Maps Day**

Finding my dad's retirement in Firm Friends. Loved everything I have seen. Roll on further open days. **Hopkinsons Information Day**

Positive Comment **100%** Negative Comment **0%** Mixed Comment **0%**

## Local History Programme Group evaluation

The Local History Programming Group was made up of representatives of many of Kirklees' history and heritage groups, including the University's History department. This was done to ensure that there were many geographical and historical viewpoints and interests represented.

### Meeting and attendance

At the first meeting, the following aims were given by the group which formed the remit for programming:

- Importance of networking with other groups, avoiding clashes and sharing information (for example speakers)
- Connections between the HQ programming groups could be explored; both Rugby League and Music have connections to local history.
- Ideas included, Mechanics Institutes, new/old images of Huddersfield, Maps, theatre and nursing

Overall, the first meeting was very practical, with many discussions about potential events. There was less talking about shared aims. One thing that was discussed in depth was the Huddersfield Gems exhibition.

The events run during the programme were;

**Huddersfield Gems exhibition launch** First event run to launch Programming Group's exhibition.

**LEGO day** Event linked to Huddersfield Gems exhibition, making buildings. Run in school holiday, using external activity provider.

**Huddersfield Gems Lecture: The Romans in Huddersfield** Final exhibition-linked event, run by LHPG member, the Huddersfield & District Archaeology Society. Lecture and hands on with objects linked to their case.

**Maps Day** Talks and displays related to maps. Lectures delivered by people from LHPG member organisations and collections brought from members too.

**Hopkinsons Information Day** Open day linked to collection, gathering knowledge for cataloguing.

**Colne Valley Labour Party is 125!** Delivered with party members and historians.

**Under Pressure** Engineering event linked to a collection, activities partly delivered by colleagues from the School of Computing and Engineering.

**Conscientious Objectors** Theatre project and performance using archives, delivered in partnership with the Lawrence Batley Theatre.

**Newspapers History Day** Like Maps Day, with different theme.

**Speaking Yorkshire** Celebration of local dialect inspired by collections. Delivered with dialect group.

**Recalling the Midwives** Run as part of International Women's Day, delivered with student midwives, comparing historical collections with modern-day practices.

**Heritage Quay History Festival** A history fair for local organisations incl. LPHG groups.

## Successes

The LHPG delivered a really strong programme, with a very diverse range of events. The P&E Officer was keen that the events were not just a series of lectures about the collections and the LHPG were ambitious enough to follow this path. The programme ended up featuring engineering, drama, history, archaeology, linguistics and architecture. This breadth didn't undermine attendances and delivered a consistently engaging programme.

Importantly, activity also provided opportunities for networking, both at meetings and events, something exemplified by the Heritage Quay History Fair which brought together 90 members of the history and heritage community in Kirklees to share knowledge, ideas and spend time together. Other highlights were the Hopkinsons Information Day and the Conscientious Objectors performances, for different reasons. The Hops day was a great example of how cataloguing activity and community engagement work well together, and Heritage Quay was also able to show former staff that their archive was being looked after safely. The COs project was great because it brought the stories from a smaller (Arthur Gardiner) collection to life and avoided being a talk on the subject.

## Challenges

One of the larger challenges was the limited amount of local history collections in the Heritage Quay holdings. This had an effect on the amount of ideas generated and also hindered work with more diverse communities—it was difficult to identify archives to use in a way that wouldn't feel tokenistic. The P&E Officer also had to push the LHPG at times to be more creative and imaginative in programming which they were happy to do with support.

The local history programme also had some issues with delayed or cancelled events, the most notable example being Maps Day. This was originally planned for Autumn 2015 but due to a combination of the P&E Officer's other commitments and a lack of urgency on the LHPG side it was rescheduled to the following January instead. This resulted in a much better event, but was not necessarily ideal.

## Press coverage

<http://www.examiner.co.uk/news/west-yorkshire-news/ninety-people-enjoy-hopkinsons-nostalgia-11036406>

<http://www.examiner.co.uk/news/lord-rings-full-huddersfield-words-13439927>

<http://www.examiner.co.uk/news/west-yorkshire-news/huddersfield-district-archaeological-society-reveals-9879482>

## Year-on-year development and lessons learnt

The local history programme was generally consistent throughout the three years of activity. Some events attracted a smaller audience, perhaps due to the content and marketing, but overall it was a strong and positively received series of events.

The LHPG itself ran out of steam a little towards the end, with some more sparsely attended meetings but the commitment over three years was generally very good. Attendances were as follows:

**Y1 52-44**

**Y2 46-66-90-40-46-55**

**Y3 24-37-12-90**

### Next steps

It is hoped that the LHPG can continue to meet, supported by Heritage Quay and then hopefully West Yorkshire Archive Service (Kirklees) as part of a potential Heritage Lottery Fund bid.

### Findings from the Programming Group evaluation

There were six evaluation forms completed by members of the LHPG. All reported that they felt like that they had their voices heard. Almost all attended at least four events across the programme and the average score for matching interests was 7.8/10. None of the respondents attended any training opportunities.

More members of this group came with good collections knowledge in their field, but most reported that they were able to expand this. 5/6 respondents felt the programme met their organisation's goals, with networking in particular seen as a useful activity.

### Some quotes for the evaluation:

"A great success— glad to have been involved." "Interesting and exciting project which has led to my involvement in more history projects and my membership of [a local society]." "Enjoyed being a member of a group which actually gets things done."

### P&E Officer reflections

The group was a strong, passionate and supportive part of the project, with a wealth of contacts and knowledge they were happy to share. Members were not as regular an audience as the RLPG so it may be that they were thinking as much about the interests of their respective organisations as their own interests, but that wasn't necessarily a bad thing. The programme itself had some excellent outcomes and helped create a role and profile for Heritage Quay within the local history and heritage community—no mean feat for a new space.



Maps Day



LEGO Day



Conscientious Objectors



Hopkinsons Information Day

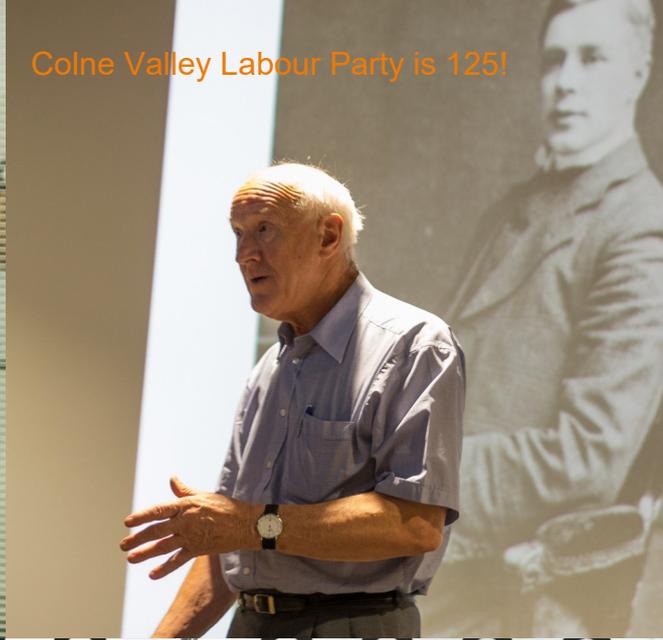


Recalling the Midwives

Colne Valley Labour Party is 125!



Colne Valley Labour Party is 125!



Under Pressure



Heritage Quay History Fair

Huddersfield Gems Exhibition Launch



Newspapers History Day



Conscientious Objectors



Hopkinsons Information Day



Heritage Quay  
WHAT'S ON Autumn / Winter 2015-16

Archives / Exhibitions / Collections / [www.heritagequay.org](http://www.heritagequay.org)

Heritage Quay  
WHAT'S ON Spring / Summer 2016

Archives / Exhibitions / Collections / [www.heritagequay.org](http://www.heritagequay.org)

Heritage Quay  
WHAT'S ON Autumn / Winter 2016-17

Archives / Exhibitions / Collections / [www.heritagequay.org](http://www.heritagequay.org)

Heritage Quay  
WHAT'S ON Spring / Summer 2017

Archives / Exhibitions / Collections / [www.heritagequay.org](http://www.heritagequay.org)

# THE PROGRAMME

**NEWSPAPERS HISTORY DAY**  
SATURDAY 28 JANUARY 2017  
10.00AM-4.00PM

If the past is a different country, then newspapers can be the guide book. Join us to explore what the media can tell us about what happened, why it happened and what people thought about it.

Free, no booking required.

Find out more at [www.heritagequay.org/events](http://www.heritagequay.org/events)

**MAPS DAY**  
SATURDAY 23 JANUARY 2016  
10.30AM-4.00PM

Maps tell us so much about the world around us. If you read them in the right way. We'll have cartabooks of cartography and reports on hand to tell you how to make sense of them and hands on activities for all ages.

Find out more at [www.heritagequay.org/events](http://www.heritagequay.org/events)

**SPEAKING YORKSHIRE**  
TUESDAY 21 FEBRUARY 2017  
6.00PM-8.00PM

Get ready for a celebration of Yorkshire dialects at Heritage Quay with appearances from the Sunderland Festival performers and a sprinkling of experts, and the chance for you to have a go too. It will be a great evening out for all ages.

Event managed from 10 December 2016.

Free, booking required.

Find out more at [www.heritagequay.org/events](http://www.heritagequay.org/events)

**CELEBRATE RECORD STORE DAY AT HERITAGE QUAY.**  
SAT 22 APRIL  
10AM-5PM

FREE ACTIVITIES FOR ALL AGES!  
RECORD A 7" BRIDGE TO TAKE HOME ON VINYL.  
CREATE A RESPONSE VINYL SHOPPER BAG.  
EXPLORE THE HISTORY OF VINYL.

FOR FURTHER INFO AND TO BOOK:  
[www.heritagequay.org/events/record-store-day-celebrations](http://www.heritagequay.org/events/record-store-day-celebrations)

**Heritage Quay History Festival**  
Saturday 1<sup>st</sup> July  
10am - 4pm

Celebrate the rich history and heritage of Kirkstoes at this free event, open to all. All completely free!

- Displays from all the major history and heritage organisations in Huddersfield & District.
- Short talks about local history.
- Behind the scenes tours of Heritage Quay.
- Light refreshments.
- See gems from the Heritage Quay collections.

Find out more information here [heritagequay.org/events/heritagequay/historyfestival](http://heritagequay.org/events/heritagequay/historyfestival)

**Yorkshire Music Weekend**  
University of Huddersfield  
29 - 30 July 2017

Come and celebrate Yorkshire music at Heritage Quay! Our incredible line-up performances and workshops will bring to life some of Yorkshire's fascinating musicians and composers. From brass bands to opera, vinyl and classical, there's something for everyone. Everything is completely free.

Find out more information here [heritagequay.org/events/yorkshire-music-weekend](http://heritagequay.org/events/yorkshire-music-weekend)



Local History



Rugby League



Music



144



521

32 events

1,299 attendances

Top 5 events

Yorkshire Music Weekend	136
Hopkinsons Info Day	90
HQ History Fair	90
Maps Day	66
Indomitables	66



599

# Overall programme

The stated objectives of the co-created programme were to provide:

- Increased understanding of the heritage of specific interest areas
- Exchange of knowledge between academics and audience
- Sense of ownership of the centre by users and audience members

There were around 150 completed feedback forms from attendees across the events programme, which represented around 15% of attendees.

From these forms 78 comments feature feedback explicitly expressing enjoyment and/or fun, with six examples of being surprised, two referencing exploration/making and two being inspired. Comments such as “amazing” and “great” were not coded for use in this evaluation but feature on many forms.

The programme also delivered a lot of information with 39 responses tagged as “interesting” or referencing learning something. Three responses also mentioned knowing about something and three more about deepening understanding. The programme also had an impact on attitudes and values, with a total of nine responses saying that feelings and perceptions had been changed.

More broadly, the programme delivered a range of deeper social benefits. As the programming groups’ feedback shows, regular meetings and chances to share knowledge and experience helped Heritage Quay’s communities of interest to improve inter-group dialogue and understanding and worked to build the capacity of the groups (delivered through the related activities listed below).

The programming group’s feedback also demonstrated that Heritage Quay is a safe and trusted public space and that they (and event attendees) were happy to attend activities in the space. Ten attendee feedback forms specifically mentioned this.

The programme helped children and young people to enjoy life and make a positive contribution, mostly notably through the Conscientious Objectors project/performances.

A final thought on the overall programme is that the events generally suffered from a lack of passing trade - without large groups of the public in the space or passing by, all the events were required to generate their own audience that was committed enough to attend.

One thing difficult to assess is whether audiences saw an overall programme or came to individual events. There is some evidence that coming to one event would lead to repeat visits (particularly in the rugby league programme) but not enough to draw out broad trends.

Overall the programme delivered a successful series of events that illuminated collections, brought in new audiences and built relationships with colleagues in the University and the communities of interest connected to our collections.

The initial target for attendees was 950 across 38 events. In the end, there were 1,299 attendances from 32 events.

# ADULT LEARNING

14

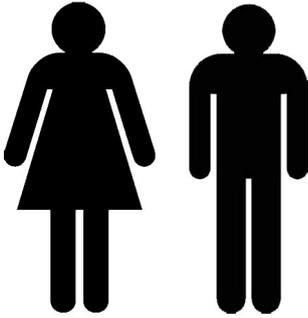
courses

207

workshop attenders

32

workshops

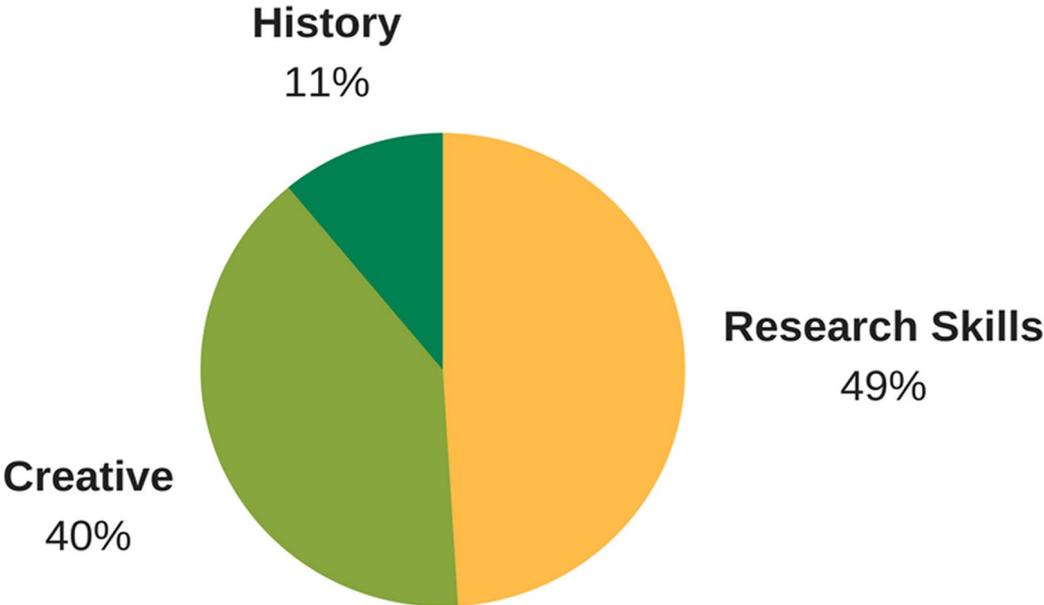


114



93

course  
content  
by  
type



# ADULT LEARNING

The informal adult learning programme was split into three types of activity: skills, history and creative, broadly linked to the participation themes of local history, music and rugby league.

## Historical Research Skills

The Historical Research Skills strand was primarily aimed at, and marketed to, the local history and heritage community and developed with the Local History Programming Group (see below). It also attracted members of the rugby league heritage and music communities and some university students. Overall, seven courses were delivered across two years, with 84 attendances. Delivery was led by a range of experts sourced and supported by the P&E Officer, who co-delivered the sessions. These included Heritage Quay staff, academics and local heritage professionals. The courses run were: Archive Skills, Palaeography, Oral History, Preservation, Geomapping, Curation & (Methodist) Family History.



## Summary of feedback

Archive skills “A great start - fun - not dry at all and we learnt a lot. Enthusiasm from Rob and Dave very infectious.”

Palaeography “Excellent (hard work but I enjoyed it)”. “(Possibly) tried to cover too much within the 2 hours.”

Oral History “Very good in terms of principles and practicalities.”

Preservation “Excellent, lively, friendly learning. Lovely to be able to try out the skills during the session.”

Curation “Excellent! Very well organised and presented. I've learned a lot that will be of value.”

Geomapping There was mixed feedback - a wide range of abilities meant it was difficult to suit anyone. Even though it was a three-session course, more time or a smaller remit were probably needed.

Family History “Fantastic - very interesting and informative.”

Overall the programme was very effective, with most of the participants pleased with what they had learnt. Interestingly, there wasn't a lot of cross-over between courses (only a few people attended more than one) which suggests we were serving different interests each time. It may be that some of the later participants would have booked on the earlier courses if they had known about them. There is scope to re-run these earlier courses again to ascertain if there is such a need. Many of the sessions were not fully booked, but most had reasonable attendances.

## Creative sessions

The second biggest strand was creative workshops, linked to Heritage Quay's music collections. Across all four courses, bookings were strong but actual attendance disappointing, with around 50% of bookers turning up. This was frustrating as some sessions had waiting lists. There were a total of 24 attendances. These sessions broadly attracted more student bookers, but they were mostly, although not exclusively, the ones who didn't turn up on the day.

The workshops were: Conducting for Beginners, Music in Motion (animation), How to Write About Music and Radiophonic workshop.

Despite these challenges, workshop satisfaction was high and there were some great responses to evaluation questions: "Fun and interactive", "Very good. Friendly, challenging, fun", "Brilliant!" "AMAZING!!" "5 stars. Excellent. Very entertaining" "It was great, lots of fun, great experience and lots of inspiration." "Lots of fun enjoyed the creative process." "Learned a lot in a short space of time. Plus we made some really cool models." "Really fun to explore new techniques." "Fun, wasn't sure what we would be doing, fascinating and helped me create some writing."

60% of participants learned a new skill and all had fun and were able to be creative.

## Historical sessions

Three multi-session history courses were delivered, with one for each programme theme. There were 90 attendances across the three courses.

**Roots Of Rugby League** was a course delivered by Rugby League Programming Group member Professor Tony Collins, for a very passionate group of enthusiasts. The course used, and provided context for, our collections. It attracted an audience from across the north, not just local people.

**Brass Bands** was delivered by an ex-student, drawing on their PhD research. The course included materials from our special and music collections and materials provided by the course tutor.

**Clocking on at the Hops** was a course about the history of Hopkinsons, one of the archive collections. It was delivered by the P&E Officer. The audience were ex-staff or their families and because of this, the sessions were designed to be interactive, with plenty of opportunities for the community to contribute their own knowledge. All participants learnt things they didn't know before the course but were also prompted to remember and share their own or family experiences.

Evaluation was also positive for these courses; "Very good/5 star." "Exceeded expectations." "Well presented in an informal atmosphere. Very informative and would heartily recommend to others" (Roots of Rugby League). "Very informative and useful for my own research." "Thought provoking elements which will stay with me for a while" (Brass Bands). "Very interesting looking at the old pictures and hearing about the start of the company to the modern day." "[best thing] Remembering the past life at Hopkinsons." "Brilliant, learnt a lot" (Clocking on at the Hops).

## Evaluation summary

### Outcomes

Evaluation forms were completed by around 50% of workshop attendees (105/229). The forms were tailored to each session/course. General comments such as “good”, “excellent” etc have not been coded for the purposes of this evaluation.

Across these forms, 56 responders commented that they had learnt something/it was interesting. Three people said a course had helped them make sense of something and seven had a deeper understanding of something.

Skills development was understandably high, with 19 comments about learning a new (general) skill, 10 comments about learning an intellectual skill, nine for information management skills, six for communication skills and two for physical skills.

The courses had a smaller impact on attitudes and values, with a total of 10 responses covering feelings about the learners or others or perceptions of things.

42 respondents mentioned fun/enjoyment as part of a course, with five being surprised, and smaller numbers feeling creative, inspired or a maker.

### Workshop structure

Some of the courses took some time to find their groove - running them over a few weeks helped smooth this out. Many of the courses were not run by experienced adult learning coordinators and some deliverers perhaps didn't have as much support from the P&E Officer as they required. The Brass Band and GIS courses were examples where learning and learners didn't quite fit together.

The courses offered covered a wide range of interests but the main focus on historical skills did result in many participants coming from the local history and heritage worlds. The HRS programme tried to offer a suite of practical skills but couldn't provide progression routes. However, courses were run in response to the question “what else do you want to learn” wherever possible.

## Final reflections

Overall, the adult learning strand had some interesting experiments with good outputs. In general there was very high satisfaction but some issues with attendance. Programming was reduced for adult learning in the final year so more focus could be given to other areas of the programme.

It should be noted that sessions delivered for the Huddersfield Contemporary Music Festival, parts of some co-created events and as part of Heritage Open Days could be identified as providing informal adult learning opportunities too.



Radiophonic Workshop



Conducting for Beginners



Music in Motion



What will you discover?

HRS: Curation

# PARTNERSHIP ADULT LEARNING

The HLF Activity Plan laid out a series of objectives for working in partnership with adult learning providers across Kirklees, with targets of 300 adults engaged from 10 partner organisations, and training delivered for up to 30 tutors.

This work was proposed on the back of the consultation period, where a strong interest had been expressed for links to adult learning providers, in partnership with the university's Schools and Colleges Liaison Service.

However, the adult learning landscape in Kirklees had changed dramatically in the intervening period, with much of the local authority's capacity reduced in this area. The SCLS team had also changed direction. Despite attendance at several local authority partnership meetings (including one hosted at Heritage Quay), the P&E Officer was unable to find potential partners able to work together.

Some activity was undertaken in partnership with the WEA, which resulted in a total of 58 learners engaging with archival material as part of a workshop or project. Although the local WEA coordinator did not deliver historical content, joint working was pursued through the Calderdale office and at a regional level.



WEA Yorkshire & Humber  
www.wea.org.uk/yh

Workers' Educational Association

### Family History: Catalogues and Collections

With so much information online do we need to look beyond commercial sites?  
Join Jackie Depelle and dip into the material held in Archives, Libraries and Museums.

**Saturday 4th July 2015**  
10:00am - 4:00pm  
at Heritage Quay, 3rd floor of the Central Services Building, University of Huddersfield Queensgate Huddersfield HD1 3DH

Fees: £20.00 or FREE (subject to status)  
You can enrol online at [enrolonline.wea.org.uk](http://enrolonline.wea.org.uk) or by calling 0113 245 3304.  
Please quote course reference: C366551

In association with Heritage Quay and supported by Huddersfield & District Family History Society








Contact details:  
Telephone: 0113 245 3304 or email: [yorkshumber@wea.org.uk](mailto:yorkshumber@wea.org.uk)

[www.facebook.com/weaadult](https://www.facebook.com/weaadult)

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WEA Yorkshire & Humber  
www.wea.org.uk/yh

Workers' Educational Association

### Adult Education and the Great War in Yorkshire: 3 Workshops



Three free stand-alone workshops providing an opportunity to explore the impact of the First World War on adult education and how this reflected wider changes in society and education that resonated into peacetime.

Each workshop will explore both local and wider contexts, looking at archive material available in Yorkshire that helps to illuminate individual and collective stories of people involved in adult education as students, tutors and organisers, and what these stories can tell us about how communities and organisations responded to the experience of the first global war. Participants may also have information or stories about relatives who were involved in adult education at the time, or want to find out more about them.

Workshop	Huddersfield	Sheffield	Leeds
	Friday 20 May, 10.00am - 2.00pm, Heritage Quay, University of Huddersfield	Tuesday 24 May, 10.30am - 2.30pm, The Circle, Rockingham Lane, Sheffield	Friday 27 May, 10.00am - 2.00pm, Parkinson Building, University of Leeds

Places are limited to 15 per workshop.  
Please contact Flob Hindle on 07956 568 640 or at [rhindle@wea.org.uk](mailto:rhindle@wea.org.uk) by Wednesday 11 May 2016 for further information and details of how to apply for a place.

University of Huddersfield  
Inspiring tomorrow's professionals

Yorkshire & Humber Region: [www.wea.org.uk/yh](http://www.wea.org.uk/yh)

[www.facebook.com/WEAYorkshireHumber](https://www.facebook.com/WEAYorkshireHumber) @WEAYH

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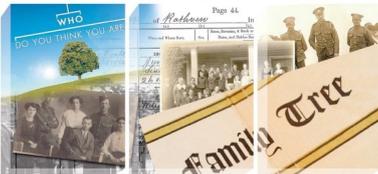


WEA Yorkshire & Humber Region  
www.wea.org.uk/yh

Workers' Educational Association

A WEA dayschool at Heritage Quay

### Organising and Writing Your Family History



Most people researching their family tree dream of turning their research into a narrative account – often a daunting idea. Join our dayschool to discover how this might realistically be achieved whilst experiencing a variety of source material.  
With tutor Jackie Depelle

**Friday 18 March 2016**  
10.00am - 4.30pm

At Heritage Quay, University of Huddersfield, Central Services Building, Queensgate, Huddersfield HD1 3DH

Fee: £18.90, or free if you receive certain income-related benefits  
Lunch included and provided by Heritage Quay - Course ID: C3667971  
You can enrol online for this dayschool at [enrolonline.wea.org.uk](http://enrolonline.wea.org.uk) or by phone (Monday - Friday 9.00 - 5.00) on 0113 245 3304

[www.facebook.com/WEAYorkshireHumber](https://www.facebook.com/WEAYorkshireHumber) @WEATH

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Evaluation forms from a WEA, University of Leeds, University of Huddersfield and Heritage Quay partnership project demonstrated that there was significant value in using non-military collections to explore conflicts such as the First World War.

"I found the role of women to be of interest during the Great War... It was quite interesting to discover the status of children and how they were expected to work such long hours."

# PROGRAMMING GROUPS TRAINING

## Rugby League

Across the project, two training workshops were delivered to members of the Rugby League Programming Group, covering basic archive skills and copyright and data protection.

These courses were seen as “very interesting” and “very good” and helped build capacity in the community. This training was continued through the heritage forums which addressed more practical or collections-focused knowledge and skills.



## Music

One training course, an introduction to the music collections was delivered in October 2015. Due in part to the nature and size of the MPG there was little appetite for further training and the MPG were unsure what training might be suitable for them.

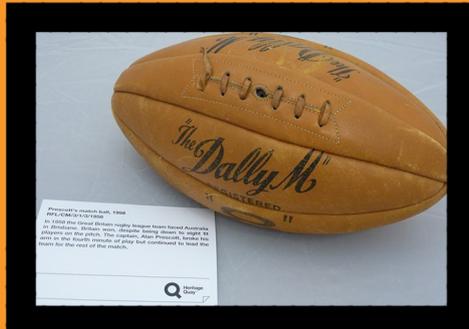
## Local History

No training was delivered for the LHPG, mostly because the History Research Skills strand of Adult Learning programme covered the areas which would be useful for the group. There was some attendance from other members of the representative societies so there is proof of some need in the community which hopefully we addressed.

# EXHIBITIONS



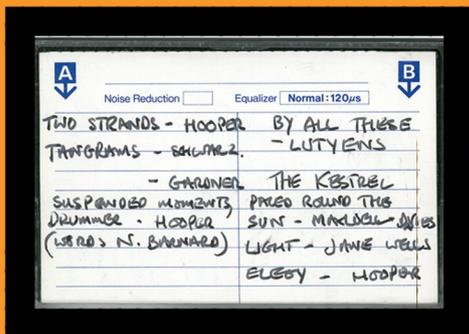
**Hudd Mechanics Institute**



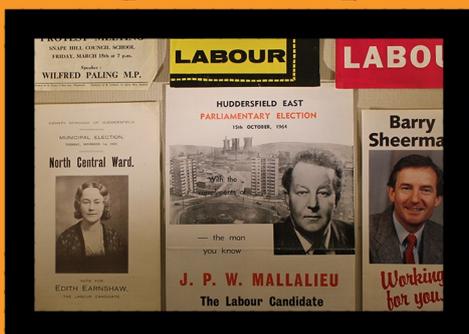
**Rugby League: In the Record**



**Huddersfield Gems**



**Music at the Cutting Edge**



**Radical Roots: Politics in West Yorkshire**



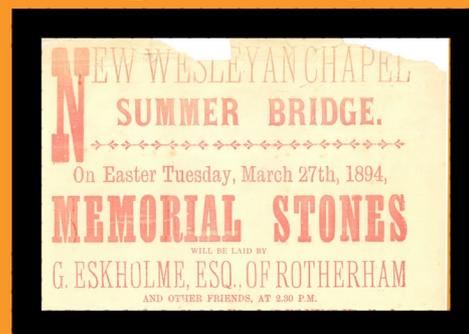
**Pressure, Power and Patterns**



**From Ovations to Arias: Huddersfield on Stage**



**Women in Heritage Quay**



**Non-conformity**

# EXHIBITIONS

The project delivered nine exhibitions between October 2014 and July 2017, reflecting the eight Heritage Quay collection themes plus one additional exhibition about local history. Curation was shared between Heritage Quay staff and external partners, strategically managed by the P&E Officer. Different curators were chosen for each exhibition to ensure that expert and diverse viewpoints were included.

Overall, the exhibition programme was successful, with a wide range of curatorial voices and collections displayed. Often curators from different backgrounds contributed to the same exhibition. They included BA History students (Huddersfield Mechanics Institute), archivists and historians (Rugby League: In the Record), members of the programming groups (Huddersfield Gems), depositors and partners (Music at the Cutting Edge and others), members of the community (Radical Roots) and informal adult learners (Non-conformity). Curators were supported with guidance on text writing and case layouts wherever possible.

One depositor/programming group member reflected that curating helped achieve their organisation's goals, because **“our society has been part of an exhibition here and I've used parts of our archive to curate an exhibition elsewhere.”**

## Some feedback from general visitors:

“I called in to Heritage Quay to see the Gems exhibition which has eluded me until now. You've done a good job to co-ordinate the work of a number of disparate groups to produce something of worth in a short time.”

“Finally made it the exhibition yesterday, and enjoyed it - a nice balance of subjects.”

“Richard Steinitz was very complementary about the HQ music exhibition and mentioned that he was advising others to come and see it”

“Visitor at Languages and Linguistics event complemented HQ on the exhibition and would like to bring her father to exhibition as he knew one of the people on a photograph in the exhibition from the Mallalieu collection.”

Where possible, exhibitions received a launch, which worked particularly well for Huddersfield Gems and the Arts exhibitions. Several of the exhibitions were also featured in local media:

<http://www.examiner.co.uk/whats-on/gallery/new-exhibition-at-heritage-quays-9714725>

<http://www.examiner.co.uk/news/west-yorkshire-news/new-exhibition-focuses-huddersfields-landmark-9720972>

<http://www.examiner.co.uk/news/west-yorkshire-news/huddersfield-mystery-lazenby-cup-rugby-8592024>



# GROUP SPACE

**645**  
**events**  
in Heritage  
Quay



**18,686**  
event attenders

# GROUP SPACE

Heritage Quay proved extremely popular for University and non-University bookers, with usage of the space far outstripping planned demand. The “Group Space” hosted a wide variety of events from lectures to theatrical performances, fashion shows and conferences. This had an impact on staff time and resources and required the team to hire a Student Helper to cover booked events outside of regular staff hours.



Huddersfield Local History Society



Undergraduate History Conference



Rugby League Cares Exhibition Launch

Heritage Quay was seen a prestige space, which was also easy to book and, for external groups - low cost. It was most popular with the School of Music, Humanities and Media but also the School of Human and Health Sciences, the Vice-Chancellors’ office and Computing and Library Services.

Welcoming so many people into the space undoubtedly had a positive impact on other elements of the project. It raised awareness of the archive’s work and collections. The P&E Officer made many contacts through bookers or attenders at these events who then contributed to or participated in engagement activities.

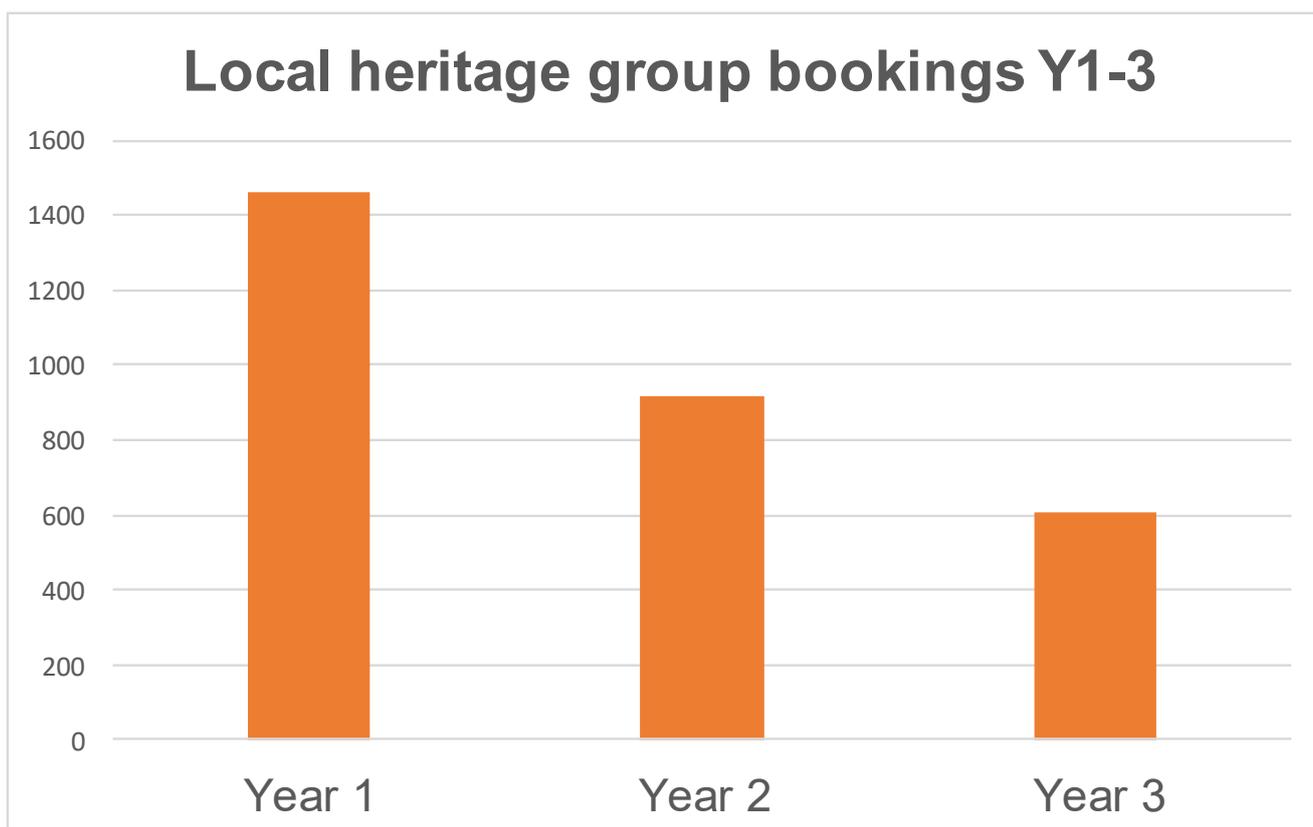


Supporters Direct

# LOCAL HISTORY GROUPS

In 2014/15 Heritage Quay proved very popular with Huddersfield and district's local history and archaeology societies, with both groups holding their monthly meetings in the space. Part way through 2015/16 the local history society decided to move to a larger space on campus - driven by a worry about accommodating numbers as well as issues with sound and heat in the space. The local archaeological society continued to be regular bookers throughout the project despite these issues and Heritage Quay has also hosted *ah hoc* meetings of the local civic society and other groups.

More broadly, the use of the Heritage Quay spaces, combined with the Local History Programming Group has led to richer relationships with the history society (running a study day together) and the archaeology society (who are now a depositor). Both societies have also given their support for bids and participated in award panels. The groups' use of Heritage Quay's spaces has been a big factor in these developments.



# THE LISTENING CLUB

The listening club was pitched as somewhere to come to listen to and discuss Heritage Quay’s music collections, with a different theme each week. It was advertised through the printed What’s On, on advertising screens across campus, through social media and online listings. Despite some concerted marketing efforts at various points (and high participant satisfaction) the concept did not gain a strong audience.

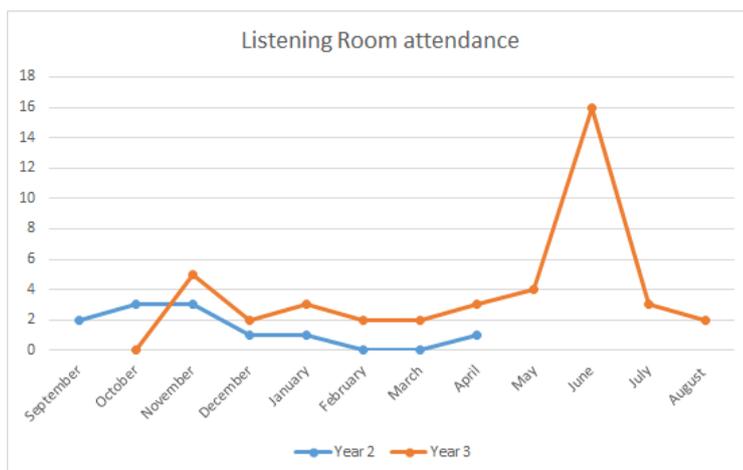
## Project Year 2

During this year (September 15—April 16), the Listening Club was run as an evening session, but only gathered a total attendance of 11, with an average of 1.2. This was mostly one person. It was decided that the time slot was not working and in consultation with the MPG, this was changed for Year 3.

## Project Year 3

For this year (October 16-August 17) the sessions took place at lunchtime on the first Thursday of the month to attract the public, staff and students. Unfortunately it clashed with the music students’ weekly performance.

However, numbers did improve, with 42 attendances over the year, at an average of 3.8. This total was skewed by the June 17 session when it was included in a music conference, but the number of regulars went up to three from one so there was some development. Satisfaction remained high.



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On reflection, the club was a difficult thing to pitch. A lack of a strong local audience for our specific music collections made it more difficult to appeal to locals. Despite low turn out, the preparation for the sessions was useful for the P&E Officer as the research improved collections knowledge, which had a positive effect on other areas of the participation programmes and the information available to researchers and students.

Going forwards, the model of linking the session to academic conferences will be pursued as this seemed to have real value and appeal.

## Some feedback:

“Excellent.” “Enjoyable and interesting.” “Brilliant.” “It was interesting to listen to the different styles of music”. “Positive and fascinating. We saw a variety of holdings and the introduction to the collections was useful.” “Excellent.” “Fascinating music - very informative.”

# HCMF

Heritage Quay ran activities as part of three editions of the Huddersfield Contemporary Music Festival (2014-2016), inspired by the festival archive. Activities were divided into two types; archival and creative, and were developed, agreed and promoted with the hcmf// team.

## 2014

This festival took place just after Heritage Quay opened. Two collections-based tours were advertised and a creative composition workshop was run. Heritage Quay also worked with depositors Sound and Music on an event.

Neither the tours or workshop attracted big audiences. Due to scheduling, neither was listed in the printed festival programme (but were online) and it proved difficult to tempt people away from concerts/venues. The partnership session was better attended.

**Total: 31 participants**

## 2015

Learning from 2014, activities were included in the printed programme and the P&E Officer worked more closely with the festival team on scheduling and content. Another attempt was made to engage festival goers with the archive via tours and a memories session and there was an Under 5s composition workshop.

As with 2014, the archive-based sessions did not attract an audience but the Under 5s session was much more successful. Feedback was very positive and there was demonstrable audience demand. The session also supported the festival's learning and participation objectives.

**Total: 32 participants**

## 2016

For this year, the sessions run were both creative. The Under 5s strand was developed into dance (using the hcmf// collection). This was again very successful.

The second creative session, Interactive Art, was more experimental. Participants created an interactive artwork inspired by the hcmf// poster archive. The artworks played music samples also drawn from the hcmf// collection. This session was delivered in partnership with colleagues in the School of Computing and Engineering. It had a high cost per learner but was a great session. University colleagues, participants and the festival team were all very pleased.

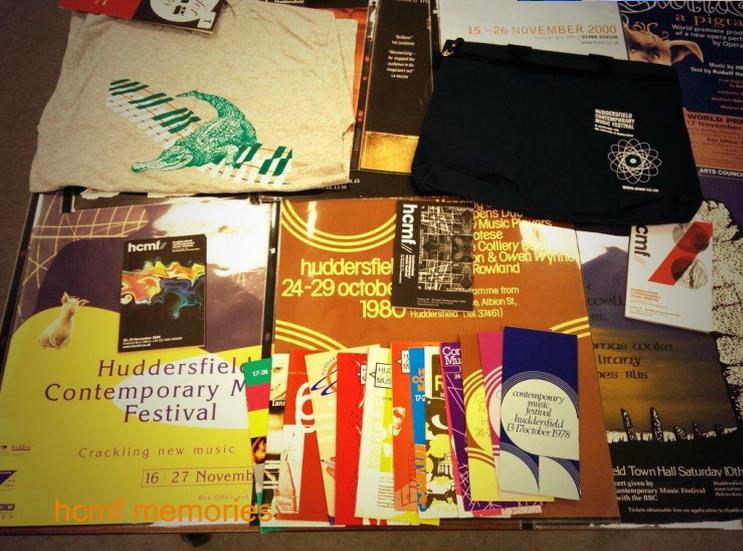
**Total: 43 participants**



Interactive Art



Under 5s Composition



hcmf memories



Composing for Non-Composers



Under 5s Composition



Under 5s Dance



Under 5s Composition



Interactive Art

# FAMILY FUN FRIDAYS



15 FAMILY  
FUN FRIDAYS

*Very good we  
will be back*

*Really enjoyed doing  
the big screen game*



142



70

*Fun! Nice to see the  
big curvy screen wall  
and try out some glove  
puppeting*

*I think I liked making puppets and capes. It was really  
fun and great*

## RUGBY LEAGUE FAMILY WORKSHOPS

In the HLF activity plan it was envisioned that 13 family workshops would be delivered across the project, linked to rugby league matches between Huddersfield Giants and other teams. From early conversations with the RLPG and the trust who deliver community engagement for the Giants it became clear that this would not be workable. A key logistical element was that games could be rescheduled at short notice to suit TV schedules - meaning it would be impossible to be flexible enough to respond to changes and promote sessions effectively.

It was decided instead to run the sessions at fixed points during school holidays as “Family Fun Fridays” so they could be regular and predictable.

Inspiration from still taken from the Rugby League archives but was a smaller part of the experience than previously planned. Workshops still gave opportunities to respond to or be inspired by collections but were not prescriptive.

As well as craft activities, events were also delivered with Rugby League Cares (a dance workshop) and GAME. For the latter, Heritage Quay hosted the launch of a new rugby league game. This resulted in some new visitors who also took part in other activities and demonstrated that this relationship was worth pursuing (for Rugby League Cares).



Family Fun Fridays mostly attracted modest attendances but built up a small regular audience of families. Some sessions were run at the same time as TeamHUD (University sports centre) school holiday clubs and formed part of their activities which worked well.

One outcome of this part of the project is that Heritage Quay has developed a bank of activities and approaches that could be used by the proposed national rugby league museum (if funded). The workshops also brought families into Heritage Quay, which helped raise awareness of not only the archive's holdings, but also other parts of the programme



# RUGBY LEAGUE HERITAGE FORUM

Two springtime Rugby League heritage forums were run as part of the project. There was no forum in the third year as there were already several programming group events taking place around the same time.

Both forums were very well received and attracted good crowds of rugby league historians, with 27 and 33 respectively. The forums featured historical lectures and displays of collections, but more importantly practical sessions on rugby league historical approaches (such as heritage numbers) and funding opportunities.

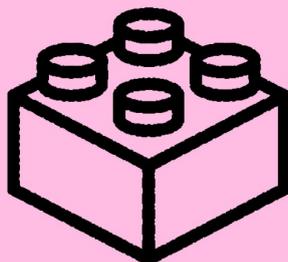
The forums welcomed people from across the north, including; Leeds, Featherstone, Warrington, Oldham, Keighley, Wakefield, Halifax, Swinton, Bramley, Bradford, Hull and Huddersfield.

Some of the best things taken away from the forums were “meeting people and learning what they were doing”, “opportunities to return and carry out research”, “... new contacts and acquired some information”, “ideas from other groups on collecting evidence”.



# HERITAGE OPEN DAYS

**2015**



**Brick-by-brick workshop**

**Tours terminus**

**106 attendances**

**2016**



**Fourth World Congress  
of Psychogeography**

**378 attendances**

**2017**



**Fourth World Congress  
of Psychogeography  
(2017)**

**480 attendances**

# HERITAGE OPEN DAYS

Heritage Quay contributed to three Heritage Open Days (2015-2017), one more than originally planned. This was made possible due to the extension to the P&E Officer's contract until September 2017. The immediate challenge was that much of Heritage Quay's set up—free entry, free behind-the-scenes tours, were already part of the offer. This left the delivery of (new) free activities as the only option. The P&E Officer joined the local Huddersfield (now Kirklees) Heritage Open Days committee to assist in planning and promoting activity across the local area, as part of the work of supporting the local heritage community.

## 2015

Heritage Quay ran an activity using LEGO, responding to the Huddersfield Gems exhibition. The session encouraged participants to recreate local landmarks, or consider the way buildings are designed and built. It was marketed as a family activity.



The Huddersfield Gems model of Lindley Clock Tower, and a participant's version in LEGO

At the end of the event, participants had helped construct a brick version of Huddersfield, featuring their versions of some of its most iconic buildings. Around 70 people took part.

Heritage Quay also hosted the end of two walks linked to the Huddersfield Gems exhibition, arranged through the local HODS committee.



## 4th World Congress of Psychogeography (2016 & 2017)

For Heritage Open Days 2016 and 2017, Heritage Quay was involved in running the 4th World Congress of Psychogeography (4wcop).

The congress was developed with a University of Huddersfield academic and two local (West Yorkshire) practitioners. The idea came from meetings about the LHPG's Maps Day when the P&E Officer met with them to discuss running a talk or workshop. It was felt the Maps Day wasn't the appropriate forum, so a separate activity, pitched as a 'fringe' version of HODs was taken forward. This small group of four became the committee for the Congress. As the Heritage Quay project was really interested in creating communities of interest around our collections, (particularly regarding local history, music and rugby league) this seemed like another community the project could support and explore new ways of approaching heritage in archives.

The 2016 congress ran across two days. It was put together by reaching out to friends and colleagues and run on a reasonably tight budget - Heritage Quay supported materials costs and refreshments but most speakers appeared for nothing. Several events were advertised in the local Heritage Open Days publicity but otherwise marketing was conducted online. The response from local people and the psychogeographical community was great, with big audiences on each day. Although the event didn't happen without issues it was broadly a success. The use of the word 'world' even meant 4wcop attracted international visitors.

In 2017 4wcop took place again, still as part of Heritage Open Days, although with slightly more distance from that initiative. Small pots of money from the University, Heritage Quay, and some donations, helped support basic catering and travel expenses. The event was split into a academic day and two public days, with the last of these hosted away from Heritage Quay. Numbers of attendees increased and more practitioners were welcomed from America, France and the Netherlands, as well as many places across the United Kingdom. RTE Radio 1 from Ireland even sent a correspondent to cover the festival for a piece broadcast in November 2017. The P&E Officer ran a workshop, Archive Drifting, using Heritage Quay collections.

<http://www.examiner.co.uk/news/west-yorkshire-news/hidden-mine-trails-instant-museum-11824167>

<http://www.examiner.co.uk/whats-on/find-things-to-do/go-behind-scenes-minsters-mills-9985040>

## What people thought about 4wcop

# 2016

“Loved it, very inspiring, but a bit hard on the knees”

“Very well presented, organised and managed”

“Lots to think about (in a good way) and another space to be playful”

“Excellent, walked a lot learnt a lot. The congress is a credit to the organisers and the university”

“Second day better than first, more accessible and playful. Generally very enjoyable though. Introductory lecture on first day would be nice”

“An excellent foray in to the world of Psychogeography”

# 2017

“I hope it continues and continues to grow to its potential. Year on year it exceeds expectations and is becoming a hub of ideas, networking opportunities and academic development.”

“It was fantastic, and made me understand the relationship between geography, psychology and well being”

“Excellent! Met lots of interesting people, engaged in some great activities”

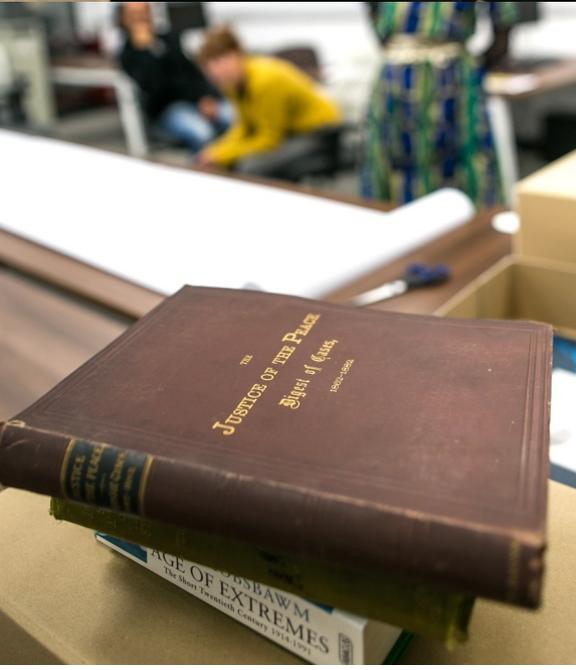
“Enjoyed the programme - great range. Catering issues on a Saturday”

“It was like a walk through a building - with chairs”

A blog on the Archive Drifting workshop the P&E Officer ran during 4wcop (2017) can be found here:

<http://heritagequay.org/2017/10/archive-drifting/>





# 3,571

**attendances**

The Participation and Engagement elements of the Heritage Quay project should be considered a success. Around 3,500 attendances over a three year period is a significant achievement, particularly as the archive did not have a track record of events and activities before the project. The most notable successes were;

**Partnerships:** The programme was able to develop useful and collaborative working relationships with many partners, including academics, local organisations and communities of interest. These partners have led to new depositors and researchers but also positioned Heritage Quay strategically as a leader in several important areas, including public engagement at the University.

**Supporting communities of interest:** The programme was also able to use in-house and external expertise and community sharing to help our audiences, researchers and partners build their capacity, resilience and networks through training, networking opportunities and by creating a space that organisations could use to further their strategic aims and objectives. It should be noted that these two successes were not necessary to the running of this programme, but came from the needs and interests of the programming groups and Heritage Quay staff.

Broadly speaking, the largest groups of participants were; retired enthusiasts (particularly for local history and rugby league) and local families (a good proportion of whom featured a member of staff at the University). The experimental nature of the programme also resulted in a wide range of one-off attendees. A good example is the 4th World Congress of Psychogeography, which in both years attracted a local, national and international audience of mostly working-age participants. One audience outlined in the Activity Plan that was under-represented was students. Even when bookings were clearly from students (identified by email addresses) attendances were still low. Some of the work for any future events should be to identify either the barriers for the students attending as participants outside of studies and/or whether there is a need or desire for specifically student-focused events where the benefits can be more efficiently or effectively communicated.