

# Informing the Future of the Past (IFP) Review

Alice Cattermole Heritage Consultancy



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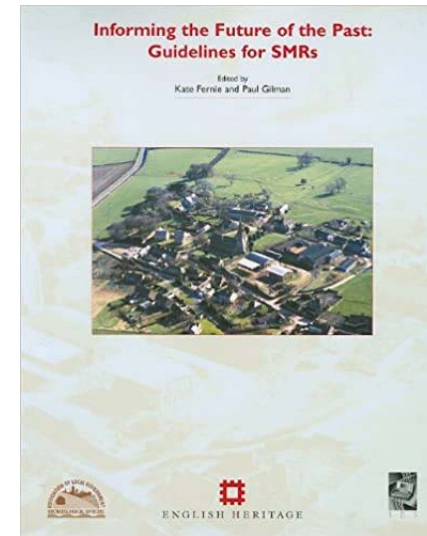
Aerial photograph of Buckenham Castle

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# Project Background

- Funded by Historic England
- Aim is to ensure guidance for HERs is up to date and accessible
- First iteration was hard copy, compiled in 2000, England only
- Current version is online wiki hosted by ADS, uploaded in 2012, expanded to include Wales and Scotland
- Review due by March 2023



**Informing the Future of the Past**  
Guidelines for Historic Environment Records

Home page

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**The essential set of working guidelines appropriate to all HERs, large and small, and for all staff, volunteers and students involved in managing, running, using or supporting an HER.**

These guidelines have been developed to assist those who manage, work in and use Historic Environment Records (HERs). They provide an introduction to the HERs and the services that they provide, set out agreed guidelines for working practices, support the delivery of training information and advice, and provide a guide to all aspects of HER management, working practices, standards, systems and services.

This new edition in wiki format constitutes a major revision and expansion from the first two editions to include recent developments and covers Wales and Scotland as well as England with numerous case studies. The publication is the result of a collaboration between Historic England, Historic Environment Scotland, the Royal Commission on the Ancient and Historical Monuments of Wales (RCAHMW), the Association of Local Government Archaeological Officers UK (ALGAD UK) and the Archaeology Data Service (ADS).

This online manual for HERs is available to view as standard web pages (html) with a contents side bar and hyperlinks for ease of navigation. A major change from the previous edition is that pdf versions of the sections are no longer available, this move away from creating a physical page layout facilitates the speedy updating of the text by the editors and contributors using wiki technology. We would there-



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# Our Approach

- Joint bid by Idox plc. and Alice Cattermole Heritage Consultancy
- Advisory Group composed of people working across the sector
- Consultation with sector partners across the UK, users of current IFP and future users of updated IFP
- Results of consultation will inform revised IFP
- Options paper for new digital home for IFP
- IFP as a training resource
- Plan to ensure that IFP remains current



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# IFP survey

- Undertaken over a period of one week in November 2022
- Aim: to collect feedback on IFP from a cross-section of those working in or with an interest in HERs
- Disseminated via HER forum mailing list which has 400 members
- Aim: to include those who had not used IFP as well as those who had – different questions depending on previous use
- For those who had used IFP we were keen to understand their experiences, what worked well and what could be improved
- For those who had not used IFP, we wanted to understand why

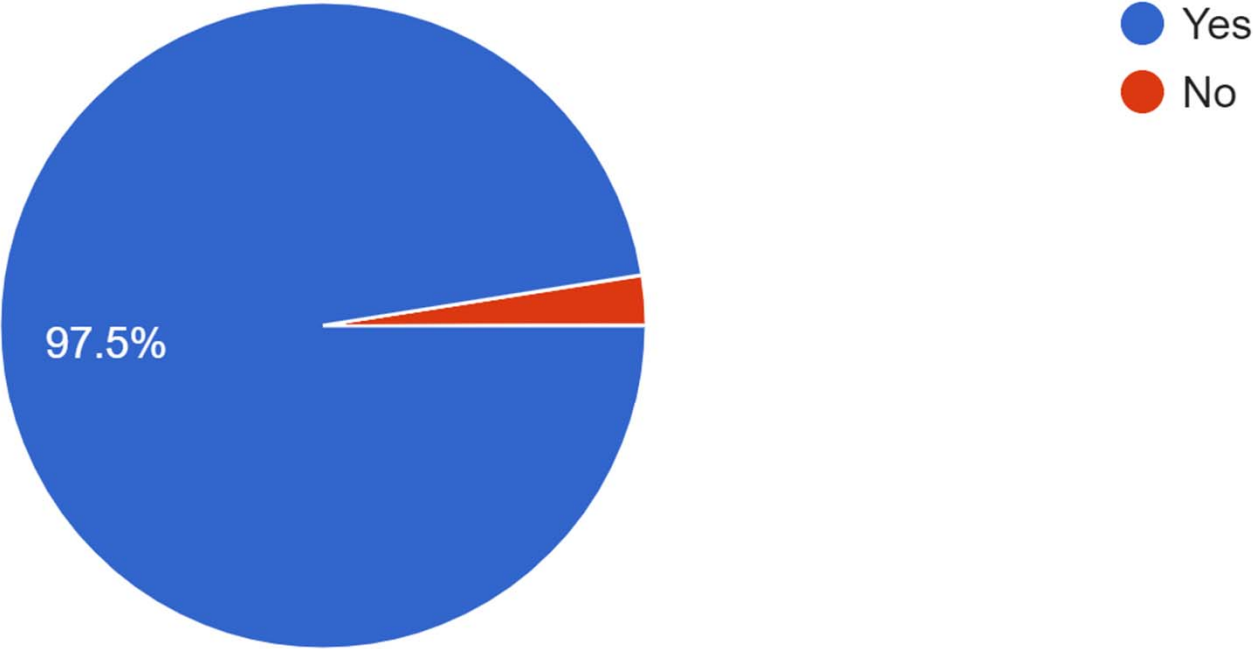


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# Are you aware of Informing the Future of the Past (IFP) guidance?

40 responses

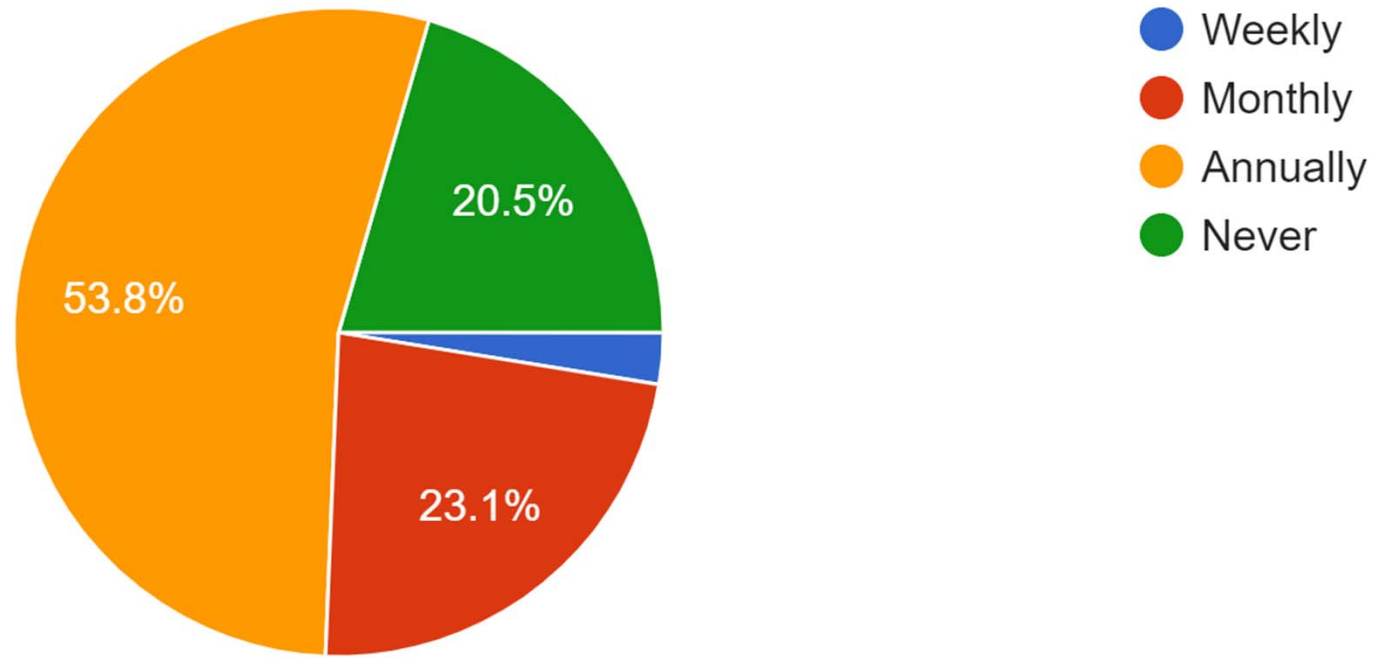


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# How often do you use IFP?

39 responses



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# Reasons given for not using IFP

“I used it when creating policy documents but have not used it again since”

“I only recently started working at an HER”

“We are not aware of how it is used and why it would be useful”

“It is too out of date to be useful”

“I do not like to refer HERs to it for guidance as it is not as relevant as it should be”

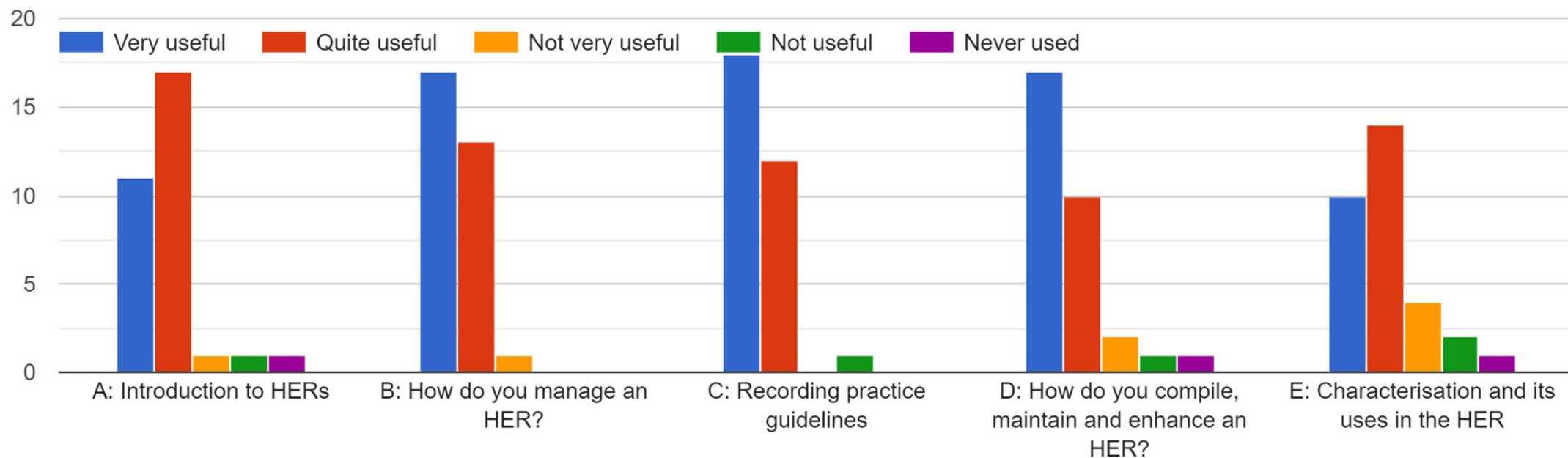
“I honestly don't see how relevant it is to my job, although that is admittedly because I've never looked at it in the first place”



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# How useful do you find each section of IFP?

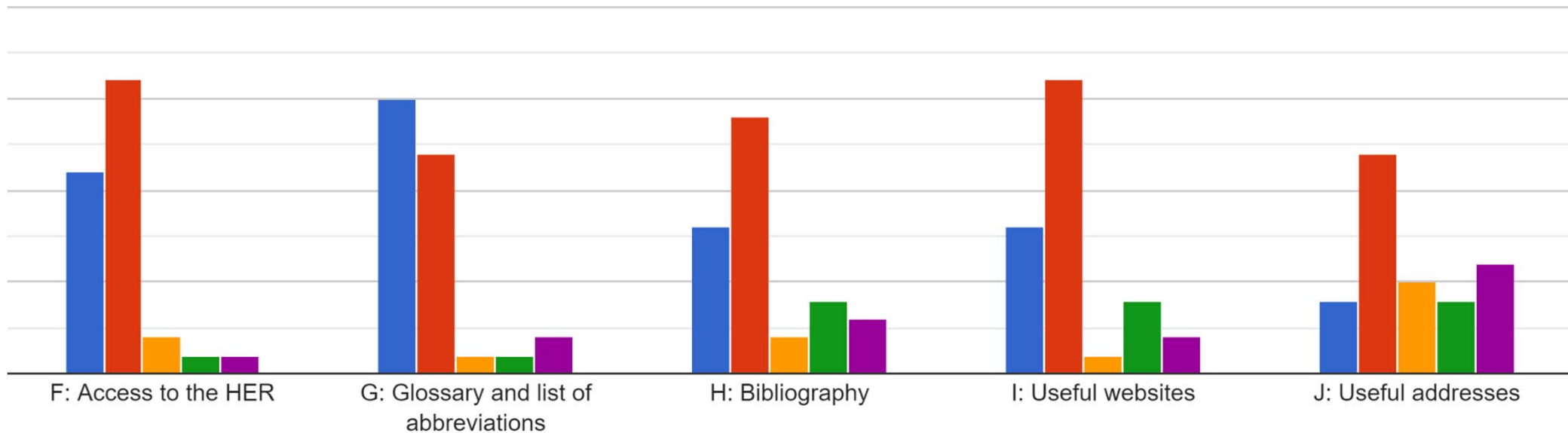


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# How useful do you find each section of IFP?



# What do you use IFP for?

*Best practice and standards*

“To review best practice”

“Checking on compliance and good practice”

“It is useful to know how things are done elsewhere”

“Understanding best practice, comparing local practice to best practice”

“Checking for latest best practice”

“To remind myself of recording practice guidelines”

“To inform in-house HER guidance documents & to ensure I'm working to the correct standards”



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# What do you use IFP for?

## *HER Audits*

“Preparing missing documents required by audit”

“Annual survey, audit, questionnaires”

“To help with data audit action plan”

“We recently participated in an audit of [our] HER and have since been working through a series of tasks to update and enhance the HER. As part of this we looked briefly at IFP”

“We hadn't used IFP until we needed to do an HER audit”

“I found IFP incredibly useful when newly appointed and navigating the HER Audit process, especially when creating HER policies for the first time”



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# What do you use IFP for?

## *Developing local policies*

“I used IFP extensively when it was first available to inform the development of key HER policies”

“To check our HER policies/guidance”

“For comparison with others’ documents and procedures and to help update documents and policies not recently compiled”

“For reference when starting new projects, for example when starting polygonisation”

“The summary and explanatory information regarding what an HER should have is ... useful to return to when reviewing HER documentation”

“To find relevant legislation such as on Freedom of Information and Environmental Information Regulations and how it applies to HERs”



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# What do you use IFP for?

## *Putting our HER into context*

“To answer specific queries about HER management issues, or to signpost further information on topics”

“To look for top level guidance on the use and purpose of HERs, and to look for specific documents on their development and standards”

“To provide advice to colleagues on standards - not for myself but to indicate part of wider system of knowledge organisation”

“I use the illustrations for in-house presentations”

“To help promote the HER to try to improve the service we can currently offer”

“It is a useful resource that we can direct those unfamiliar with HERs to, or mine for relevant information when we need to explain our procedures to non-technical audiences.”



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# What do you use IFP for?

## *Training – self-led*

“I found IFP incredibly useful when newly appointed in HER role”

“I used it intensively when I started working in an HER, to get to grips with standards”

“I was the only HER team member when I first started, so it was an invaluable tool”

“As a new HER officer, new post and role, I used it at the start of my job to double-check my understanding of things and fill in missing knowledge”

“A lot of IFP stuff is of most use when first entering the world of HERs”



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# What do you use IFP for?

*Training – HER staff and volunteers*

“Refreshing my memory on current approaches to different topics”

“To help with training staff and volunteers”

“Training staff, and refreshing my memory”

“Occasional reference, new staff training”

“It’s ... essential training for an HER Assistant”

“As a previous work experience/volunteer [I used IFP] for background reading ... and now use for CPD”



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# Future functionality

- 72% want to leave comments on IFP pages
- 30% want to add new content to IFP online
- 32% want to edit content of IFP online
- 15% want to engage in online discussions about IFP content
- 35% require print-friendly version of IFP
- 78% want to export sections of IFP for use elsewhere



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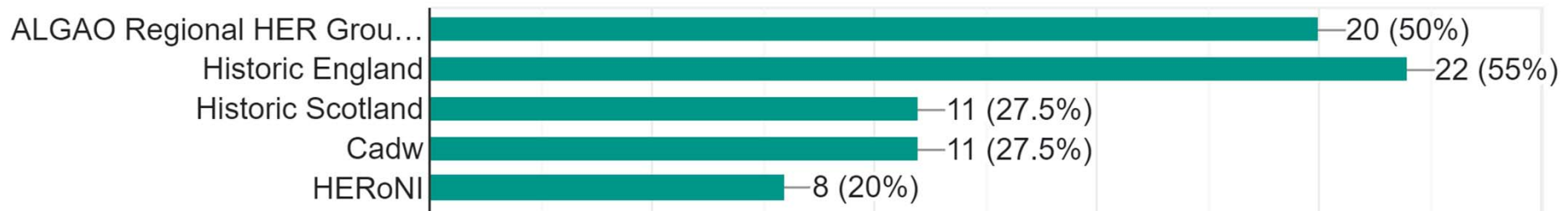
# Other feedback

- Current IFP is too lengthy and complex
- Preference for 'IFP-lite' and a 'how to...' approach
- IFP needs a Search function
- IFP should signpost and link to other resources
- Link to HERs' online resources rather than including Case Studies
- Link to relevant discussions on the HER Forum mailing list

# Keeping it current

Who do you think should have primary responsibility for this? Please select one or more options and/or make other suggestions.

40 responses



# What happens next?

- Work is underway on devising a new structure for IFP, taking into consideration feedback from the survey
- Once this has been agreed by the Advisory Group and Historic England the project team will create new content and edit existing content in line with the agreed structure
- Produce options paper and draft training plan detailing how to use updated IFP for training HER staff
- Produce plan for keeping IFP current



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