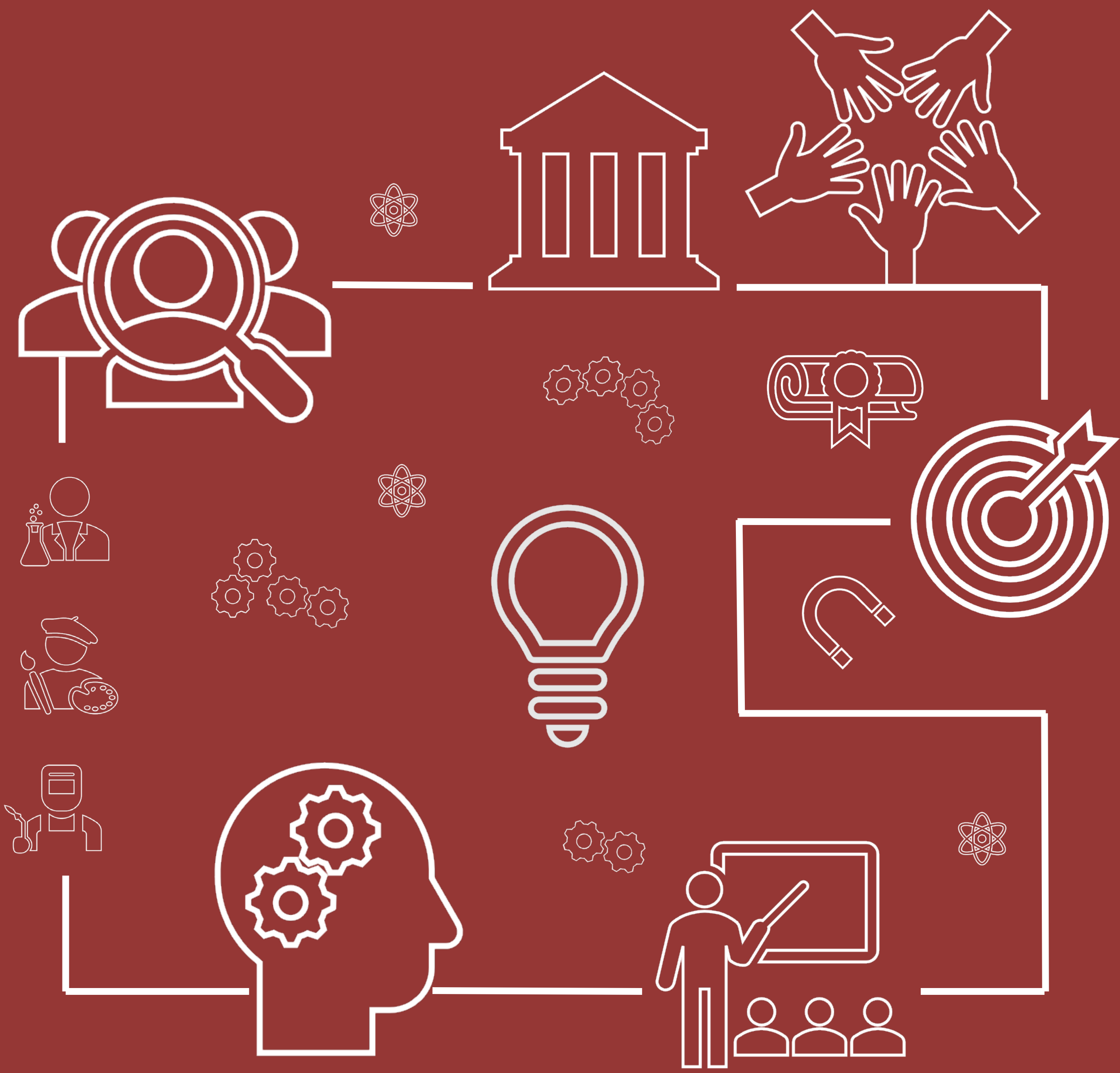

Heritage LMI Toolkit

introduction and guidance

THE INSTITUTE OF CONSERVATION – HISTORIC ENGLAND – CHARTERED INSTITUTE FOR ARCHAEOLOGISTS

Created 2019 – Published 2020

Acknowledgements
The Institute of Conservation and Loud Marketing undertook this project in 2019 in partnership with the Chartered Institute for Archaeologists and Historic England. It was funded by Historic England and supported by Historic Environment Scotland and Cadw.

The Project Team comprised Susan Bradshaw, Anni Mäntyniemi, Patrick Whife, Kate Geary and Stephen O'Reilly.

The Project Team would like to thank the following individuals for their direct contributions to the project: Edmund Lee, Jenni Butterworth, Jill Fairweather, Karyn McGhee, Helen Lloyd, Rebecca Hellen and Christina Rozeik.

Developed by:

THE INSTITUTE OF CONSERVATION

Chartered Institute for Archaeologists

Funded by:

Funded by Historic England

Delivered by:

LOUDMARKETING

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Contents

Introduction

The Institute of Conservation has partnered with the Chartered Institute for Archaeologists and Historic England to develop this Heritage LMI Toolkit (the Toolkit) to enable the collection, analysis and reporting of labour market information and labour market intelligence across the heritage space. In the context of this Toolkit, the heritage space is an umbrella term for the sectors and subsectors of the economy that could reasonably be deemed to be concerned, solely or in part, with heritage.

Labour market information is the raw data about a workforce such as age, sex, location, role, etc. Labour Market Intelligence is labour market information that has been subjected to further analysis and interpretation. In this way, labour market intelligence contains labour market information but not the other way around. We'll refer to labour market information and labour market intelligence collectively as LMI research or simply, LMI.

This introduction and guidance should be read in conjunction with our Modular Survey Template, which provides a model for setting up your own LMI survey.

Why is good LMI important in a heritage context?

LMI research can, over time, highlight trends, challenges and opportunities. It can encourage collaboration between professional and trade bodies, employers and statutory organisations and government, across the UK. LMI research can aid understanding and be used to develop strategies and plans and to make decisions. These decisions can benefit individuals, professions and trades across the heritage space as well as clients and society as a whole.

Overall goal

This Toolkit has been developed to enable users to carry out LMI research, primarily in the form of an LMI online survey, in a systematic and consistent way, so that the results can be compared across heritage sectors and subsectors. Carrying out LMI research, and sharing the results, supports the development and sustainability of the heritage workforce and informs policy and decision-making affecting the heritage workforce.

Who is the Toolkit for?

We hope a wide range of organisations operating in the heritage space in the UK will use this Toolkit. It has been developed primarily for professional and trade bodies that represent the organisations and individuals in the heritage workforce across the UK. A Toolkit 'user' is someone from, or working for, one of these organisations, who is tasked with carrying out an LMI research project.

We do not assume users have any specialist knowledge of LMI or research projects. Therefore, the guidance is designed for those who are setting up and running an LMI research project for the first time.

Objectives of the Toolkit

- Help Toolkit users set up their own LMI research survey.
- Help Toolkit users answer their own research questions.
- Provide a set of questions for inclusion in a user's LMI survey.
- Gather quantitative and qualitative labour market information.
- Produce LMI in a consistent format to enable cross-referencing and comparisons.
- Produce LMI that is accessible.
- Minimise the reliance on external funding for undertaking LMI research.
- Align with Office for National Statistics (ONS) methodologies and datasets.
- Align with Historic England's developing approach to LMI research.

What's in the Toolkit?

1. Introduction
2. LMI survey guidance
3. Glossary
4. Example of a data sharing spreadsheet
5. Modular Survey Template – See separate document.

Sharing your LMI

You are encouraged to share with Historic England the raw data you collect through your LMI research project set up using this Toolkit. This is to facilitate an overview of broad sector trends.

Methodology

A methodology is the general strategy that outlines how research is to be undertaken.

Most of the information collected to generate LMI is data such as age, qualifications, etc. We want to collect it in an efficient and practicable way. We also want to collect data from as many respondents as possible so that we can compare this data across heritage sectors and subsectors, and across time.

Therefore, the core of this Toolkit uses quantitative research methods.

It is important to recognise that simply reporting raw quantitative data may generate labour market information but not necessarily labour market intelligence and it is the latter that provides the most value. We have included guidance on how to interpret and further analyse raw quantitative data.

Research methods

A research method is the tool used to answer your research question. It dictates how you will actually go about collecting your data. The quantitative research method at the core of this Toolkit is a survey method.

With a survey method, you ask your respondents to answer a predetermined list of questions.

The ideal question:

1. Measures what it is supposed to measure
2. Doesn't measure other concepts
3. Means the same thing to all respondents

Qualitative research methods, such as in-depth interviews and focus groups, can generate valuable LMI and may also be appropriate for very small sample sizes.

We have included guidance on setting up and running in-depth interview and focus groups as an additional method to the core survey.

Guidance

Research process
Each LMI research project needs to follow a process so that it is structured and carried out in a way that meets its goals within parameters such as a timetable and budget.

We suggest following this research process:

- Research planning
    - Formulate a business case
    - Define your goal or research question
    - Set research objectives
    - Agree the scope
    - Decide which respondents to focus on
    - Decide your sampling technique
    - Decide your sample size
    - Draw up a detailed tasks list
    - Set a budget
    - Set a timetable
    - Create a risk and issues log
    - Agree quality assurance measures
- Setting up your LMI survey
- Gathering data and information
- Analysing data and information
- Interpreting your results
- Reporting results
- Tips for designing charts
- Tips for designing tables
- Disseminating and sharing results
- Archiving
- Additional guidance for qualitative research

Formulate a business case
It's important to consider why you are setting up an LMI research project, from a business case perspective. The business case links your LMI research project to your corporate strategies and targets. Writing a business case will help you specify your project appropriately so it is feasible within your available resources. For example, is it feasible to survey your sector's entire workforce or a subset of it? And, crucially, what are you going to do with the insight, information and data you gather? These elements should be set out clearly at the start of your project, before resources are committed.

Define your LMI research goal or question

Your research goal is the general, overall purpose of your LMI research project. It succinctly tells others why you are carrying out the research project. It is a broad statement of your overall intent and describes what is to be accomplished. For example, are you aiming to get a full overview of the workforce, or are you looking to understand a specific area?

- An example LMI research goal might be: To improve our understanding of diversity across the marine archaeology workforce.

Similarly, your research question is the central issue to be resolved by the research project. It usually recognises a current challenge or opportunity.

- An example research question might be: Where should the paper conservation sector focus its training resources?

This Toolkit provides predetermined questions in a set of Modules, covering a range of LMI subjects. Your research goal, aim or research question may determine which Modules you choose to include in your LMI survey.

For project planning purposes, your goal or aim is generally translated into specific objectives.

Set LMI research objectives

Developing your goal, aim or research question will help you focus your objectives. They should be specific, measurable, achievable, relevant and timed. Objectives are the driving force of a project and dictate what you will actually do. Everything you do during the project must contribute toward meeting your objectives, so in this way the research objectives determine the structure of your LMI research project.

It is good practice to only ask the questions for which you want answers. Otherwise you may spend resources collating and interpreting information, which you do not need.

The Modular Survey Template contained in this Toolkit provides predetermined questions covering a range of LMI subjects. The Modules and the questions within them form the basis of an LMI survey. Your research objectives may determine which Modules you choose to include in your LMI survey.

An LMI survey created using the Modular Survey Template will generate mainly quantitative data, with limited qualitative insight in the form of text written in comment boxes. Your research objectives may determine that more qualitative insight is needed and so you could include a qualitative research method such as in-depth interviews and focus groups in your LMI research project plan. We have included guidance on setting up and running in-depth interviews and focus groups.

Agree the scope

This Toolkit has been designed with a focus on those with ‘specialist heritage skills’ and services. A person has ‘specialist heritage skills’ if they concentrate primarily on a particular heritage subject, activity or specific and restricted field and are demonstrably knowledgeable and experienced in it.

This includes employed and self-employed people in the private sector and/or in the public sector both national and local, and in the not-for-profit or third sector. It also includes work-based trainees, volunteers and people from overseas offering their services in the UK.

It does not include customer service staff, guides, cleaners, administrative staff and others who demonstrably do not have ‘specialist heritage skills’.

Focus on your respondents

The respondents to an LMI survey set up using this Toolkit are most likely to be people representing an employer organisation. The survey will ask them to provide quantitative data, and some qualitative insight in the form of text in comment boxes, about the workforce at their employer organisation. In this way, the LMI surveys set up using this Toolkit are answered by employer organisations and not by individuals in a workforce.

As a reminder, this Toolkit has been developed primarily for professional and trade bodies that represent the organisations and individuals in the heritage workforce. A Toolkit ‘user’ is someone from, or working for, one of these organisations, who is tasked with carrying out an LMI research project.

Toolkit users will generally know which employer organisations to contact, perhaps they are a member organisation or are simply a large employer operating in their sector or subsector. You should therefore already have contact details for them, or they should be readily available via some secondary research.

Self-employed people, including freelancers, sole proprietors and sole traders should be included as part of an organisation’s specialist heritage skills workforce if you use them regularly.

Decide your survey sampling technique

A sample is the sum of all respondents in a research project. It may or may not be a representative subset of an overall population.

A population in a research context is all (or at least a large collection) of the people, organisations or objects that are the focus of your research. So, it could be all your members, or clients or customers, etc.

Survey sampling is the process through which you select potential respondents within your population to take part in your survey.

Ideally your sample will be representative of your population as a whole. There are numerous ways of getting a sample. These are generally grouped together under two headings:

- Probability sampling
  For more information: https://www.surveymonkey.com/mp/probability-sampling/
- Non-probability sampling
  For more information: https://www.surveymonkey.com/mp/non-probability-sampling/

Probability sampling techniques randomly select a sample from a larger population. Everyone in that population must have a chance of being selected. Probability sampling is all about ensuring that the sample is representative of the population and is statistically reliable.

In practical real-world situations, probability sampling can be difficult. If you are finding it difficult, we recommend using a non-probability sampling technique such as:

- Convenience sampling – a sample are selected only based on convenience in terms of availability, reach and accessibility.
- Snowball sampling – where you rely on initial respondents to refer you to other respondents.
- Quota sampling – like stratified sampling, but each division is sampled according to a predetermined quota, e.g. we must have 20 of X and 50 of Y.
- Purposeful sampling – a method where a sample is selected based on characteristics of a population and the objective of the study.

You could simply ask all of your population to complete your LMI survey. But you may get a disproportionate response from a particular constituent part of your population. For example, you send a survey out to all archaeologists and you get back a very large number of responses from older archaeologists. That could affect your results, as your sample may not be representative of your population.

So, if you are sending your LMI survey out to your entire population you need to make sure that everyone who matters is represented accurately. This should also be reflected in your research objectives, detailed tasks list, risks and issues logs, budget and timetable. For example, if certain organisations employ a large workforce then you may decide that you need to contact them directly to ensure they take part.

As your LMI survey results will be shared across the heritage space, it is important that your data is reliable. A measure of reliability is the degree to which research measures something the same way each time it is used, under the same conditions. A good sample helps ensure you ‘measure something the same way’.

A good sample also aids consistency, especially across time. If you have a representative sample, you can survey them again and again – assuming they wish to participate. And you can replace non-participants with others of a similar profile.

IMPORTANT NOTE ABOUT BIAS:
Sampling bias can occur if decisions are made about sample selection that mean that some individuals have a greater chance of being selected for the sample than others. Sample bias is a major failing in research design and can lead to inconclusive, unreliable results. Self-selection or non-response bias is one of the most common forms of bias and is difficult to manage. Participation in questionnaires/surveys must be on a voluntary basis. If only those people with strong views about the topic being researched volunteer, then the results of the survey may not reflect the opinions of the wider population, thus creating a bias.

Decide your sample size

Assuming you know the size of your population, you can then decide on the number of respondents you need – the size of your sample. Your sample size can be influenced by the size of your population but also your research objectives, your budget and timetable.

Sample size is important because observations and possibly decisions are made about a population based on the results from a sample. For example, you may wish to extrapolate the results of a sample to the population as a whole and you may make inferences about a population from a sample.

The important elements of a sample size calculation are:

- Sample size (N)
- The percentage picking a choice (p) – expressed as a decimal and normally 50%.
- Confidence level % (C) – the probability that your sample accurately reflects the attitudes of your population. 95% is commonly used with standard value of 1.96.
- Margin for error +or- % (m) – the likelihood of your population's responses differing from your samples. 5% is commonly used.

You can find an online sample calculator here: https://www.surveymonkey.com/mp/sample-size-calculator/

Draw up a detailed tasks list

Once you have formulated a business case, defined your research goal or question, set some research objectives and agreed the scope, looked at your respondents and sample, you will be ready to list the detailed tasks that need to be done to carry out your LMI research project.

Examples of detailed tasks are:

- Write email invitation copy for potential respondents and secure sign-off from CEO by the end of the week.
- Upload agreed questionnaire to online survey platform and test.
- Tabulate all numerical data gathered.

A detailed tasks list is an important project management tool, as you can check progress and performance against it. It is also useful for determining your LMI research project budget and timetable.

Set a budget

You may be able to carry out an LMI research project using this Toolkit from your own in-house resources. However, you may still need to allocate internal resources that would otherwise be used on other activities. You may also require additional resources or anticipate third party costs, which should be budgeted for during research planning.

Set a timetable

All projects should have a timetable. Like the detailed task list, it is an important project management tool, against which you can check progress and performance.

We suggest allowing four to six weeks for research planning, two weeks to set up your survey and promote it to potential respondents. Give them four weeks to complete the survey and allow six weeks for analysis, interpretation, report writing and presentation.

Create risk and issues logs

A risk is an area of uncertainty identified during research planning. Anticipating risks allows for appropriate mitigation planning and for monitoring procedures to be put in place. A Risk Log is a document, created during research planning and updated throughout your LMI research project that identifies, evaluates and suggests counter-measures for all project risks.

Risks are to be distinguished from issues, which refer to unforeseen developments that may lead to a change to the project.

An Issue Log is a document listing issues raised once the project is underway and used for keeping track of their status.

Agree quality assurance measures

You may have your own quality assurance processes and if you do you should apply them to any survey you set up using this Toolkit. Otherwise, we recommend that once you have set up your survey you do the following:

- Pause, do not rush and take your time to check the design, layout and settings.
- Proofread your survey to check for typos and other errors.
- Test the survey, ideally on someone who has not been involved in setting it up.

Set up your LMI survey

We strongly recommend setting up your LMI survey online. This is because online surveys are generally:

- Faster to set up and complete. For example, you don't have to call people or wait for respondents to return paper questionnaires.
- Cheaper, because there are no postage or telephone call costs.
- Quick to analyse via data downloads or automated tabling and charting.
- Easier for respondents to complete as they can do so in their own time or on the move.

However, you may feel it more appropriate to set up your LMI survey using other techniques such as telephone, postal or face-to-face survey, or a combination of options. It is up to you to determine your LMI research technique.

Assuming you are setting up your LMI survey online, we suggest choosing an online survey platform that allows you to:

- Include your organisation's logo, and brand the survey in terms of colour, font, etc. This will make your LMI survey feel more like it has come directly from you and may increase your response rate.
- Choose from a wide range of question types, including matrix questions, dropdown lists, etc.
- Add additional explanatory text at the beginning of the survey, at the top of a page, underneath a question.
- Export data, as this will enable you to share your LMI survey results quickly and easily and it may also enable you to do more detailed analysis.
- Email potential respondents and nudge them to complete your LMI survey.
- Enable your respondents to return to your LMI survey multiple times. This will make it easier for them to complete your LMI survey as, for example, they may need to consult with others or find out information that is not readily available to them.

Here are some examples of online survey platforms:

Google Forms
SoGoSurvey
Survey Gizmo
Survey Monkey
Survey Planet
Typeform
Zoho Survey

IMPORTANT NOTE ABOUT ONLINE SURVEY PLATFORM COSTS:
Not all online survey platforms are free and some have paid plans for more advanced features. The Modular Survey Template has been designed to minimise the need for paid plans.

Build your online LMI survey

Our Modular Survey Template provides a set of questions, answers and explanatory notes to help you build your own survey.

Under each Module heading you will see:

- Page title text for you to copy and paste. This provides a title for the Module.
- Page introduction text for you to copy and paste. This provides more information for your respondents about the Module and the questions it contains. You can copy and paste this text as the 'Page Description' in Survey Monkey or a similar online survey platform.

For each question in each Module you will see:

- Question text for you to copy and paste.
- Answer options for that question for you to copy and paste. We have included 'prefer not to say' as an answer option to most questions. This is so your respondents can quickly move on to the next question if they wish to.
- You may not need to copy and paste 'Other, please specify' as you may be able to tick a box to include that as an additional answer option, depending on which online survey platform you use.
- Question type information – e.g. single answer, multi answer, etc. Make sure you choose the correct question type.
- Notes for you (the Toolkit user) where applicable. These are just there to help you.
- Explanatory notes for your respondents where applicable for you to copy and paste as additional text to that question.

IMPORTANT NOTES ABOUT INCLUDING MODULES IN YOUR SURVEY:

- You can include any of these Modules in your survey.
- We suggest you include Modules 1 and 2 as a minimum as they will generate basic labour marketing information.
- If you choose to include a Module, you must include all the questions in that Module.
- You must not change the order of the questions within a Module or the question text.
- You must not change the answer options text.
- It is critical that you do not change any of the above, so that your data can be compared with the data collected by other Toolkit users.
- You can choose the setting in your chosen online survey platform to randomise or flip the answer options for each respondent. This is an important way of reducing order bias.

- We recommend you include all questions in each Module in a single page.
- At the bottom of each page, your respondent should be able to move on to another Module, back to a previous page.
- In this Modular Survey Template, the questions are numbered 1 to X within each Module. Module 1 has 7 questions, numbered 1 to 7, and Module 2 has 13 questions, numbered 1 to 13, and so on. As you build your LMI survey by including different Modules and the questions within them, you may wish to number the questions sequentially through the survey from 1 to X, where X is the total number of questions included.
- We recommend you make all questions mandatory, so that you gather as much information as possible.
- The exceptions are question that have comment boxes and ask for free text answers. We recommend you do not make these questions mandatory and give your respondent the option to provide additional information in the form of free text answers, where applicable.

Gather responses

Once you have set up your LMI survey, you will need to gather responses.

To maximise the number of responses:

- Set up your LMI survey online – it is the most accessible way for respondents to complete a quantitative survey.
- Keep the survey short – if you include all the Modules in this Toolkit, there will be 47 questions in total. That is the maximum desirable questionnaire length.
- Promote your survey to potential respondents before you need them to complete it. This can be done on your website, on social media, e-bulletins and magazines and generally through your normal communications activities. Make sure you include:
    - The reasons for conducting your LMI survey
    - When the survey opens and when it closes – we recommend including both dates
    - Information about an incentive, should you include one
    - Contact details for someone to answer questions
- Incentivise your respondents, for example by offering:
    - Discount on a publication
    - Discount on an event ticket
    - Membership fee discount
    - Voucher for all respondents
    - Prize draw
- Make it clear why you are doing the survey, what you need from the respondents and what you will do with the data you collect.
- Make it clear how the survey benefit your respondents, for example data on salary levels may enable you to advocate for higher salaries on their behalf.
- Nudge respondents – for example, send an email with a link to your LMI survey to your potential respondents. You may have to remind your potential respondents via follow-

up emails and/or using other methods such as telephone calls, if those respondents are crucial to the success of your LMI survey.

Analyse your data

Once you have gathered data through your LMI survey, you will need to analyse the data in order to understand it. Once you understand the data you can comment on it so that others understand it and you can begin to form conclusions and, if appropriate, recommendations.

Most of the data you collect using the LMI Toolkit will be quantitative (numerical), so statistical analysis is appropriate. Statistics help to organise and understand numerical data so you can present it clearly. This can be as simple as dividing up the responses to a question by the different answer options in percentages, so you can say 'X% of respondents think A'.

Statistical analysis can get much more complicated. The level of statistical analysis you employ should be driven by your research objectives and the data you have collected.

An initial data assessment is a good idea, as this means you can:

- Check that you have you collected data from crucial respondents.
- See if the data collected is from a representative sample of your population, where this is applicable.
- Remove any obvious errors.
- Remove duplicates.
- Remove completely blank responses.

The National Council for Voluntary Organisations webpage 'How to analyse quantitative data for evaluation' contains some useful information. You can view the page here: https://knowhow.ncvo.org.uk/how-to/how-to-analyse-quantitative-data-for-evaluation#

IMPORTANT NOTE ABOUT SAMPLE SIZES:
The size of the workforce in your sector or subsector may be very small and/or you may generate a small sample size. This means your data may not be representative of your whole population, but it does not mean that your data is worthless. You can mitigate a small sample size through cautious interpretation. It is through cautious interpretation that you may be able to generate interesting and meaningful results. Statistical analysis of small sample sizes may not always be appropriate. You may also choose to use qualitative research techniques instead of a survey to augment your survey results.

Interpret your results

Interpretation turns labour market information into labour market intelligence that you and others can use to guide decision-making. Information already interpreted by someone else may need further interpretation.

LMI research is not an exact science and so the results and conclusions drawn from LMI are not perfectly accurate. LMI is not a complete solution and you will need to apply your own strategic thinking to the results.

Tips for interpreting labour market information:

- Make sure you have fully understood the information.
- Teach a colleague – if you can explain to someone else something you know, you must have understood it.
- Can you talk and write about the subject without consulting notes?
- Get a colleague to set you a question, e.g. can you define X?
- Does the answer you have given represent a small part of your overall understanding of the subject?
- Write key messages and check that they fit the purpose and definition.
- Use your own knowledge and judgement to draw out meaning from the information.
- Consult colleagues.
- Be confident in your own abilities.
- When you comment on labour market information in order to generate intelligence, make sure you support your key message or hypothesis with facts.

IMPORTANT NOTE ABOUT CAUTIOUS INTERPRETATION:
In the Modular Survey Template, we have included Module introduction text for you to include at the beginning of each Module you include in your LMI survey. This is so your respondents will read it before answering the questions in that Module. In this introductory text, we suggest a respondent, ‘may need to find data or information in order to complete the questions’. The introduction text goes on to say that, ‘you can come back to the survey multiple times if you wish, as your answers will be saved. Please do not guess the answers. It is better that you choose “Don’t know” if you are unsure of any answer.’

Report your results

It is common practice to produce a written report at the end of an LMI research project to help disseminate the results and to aid understanding.

A good research report includes:

- A table of contents
- An executive summary
- Direct answers to your research objectives
- Clearly organised results, usually by question or topic
- Charts and other graphics to aid understanding
- Minimal methodology information
- Appendices containing tables and other dense data

An executive summary is a brief section at the beginning of a longer report that summarises the document. It is not background and not an introduction. People who read only your executive summary should get the essence of your research and its findings, without all the details. Executive summaries can range from a few hundred words, to multi-page documents.

The executive summary should answer these questions:

- What is this about?
- Why is it important?
- Why was it undertaken?
- What are the major findings or results?
- What is the next step, if any?

It may be useful to create a brief summary report that contains only a summarised background, key findings and a small number of infographics or charts – no tables, and only limited text. You can create a second, full report or attach the tables, all the charts and the complete commentary in an appendix for those who need it.

Tips for designing charts:

- Curate – do not necessarily chart everything – sometimes a table will do.
- Choose the chart that 'tells the story' of your key message. So, write your key messages first.
- Try two or three different charts if you are not sure and test on a colleague.
- Design charts for people who do not read charts often.
- Avoid chart junk – any visual elements in charts that are not necessary to comprehend the information represented, or that distract the viewer from this information. For example, do not include pattern, shadow, 3D elements, graphical ornaments or imagery.
- Always simplify if you can.
- Size of the chart – choose an appropriate size in relation to your other charts.
- Placement – maintain consistency of placement, e.g. left aligned underneath written commentary.
- Order data in charts logically and intuitively, for example by ascending or descending value (in which case be consistent throughout), alphabetically, etc.
- Set number increments on graph axes logically and intuitively and be consistent wherever possible. If you cannot always use the same increments, e.g. where the clear presentation of data does not allow it, then choose two, or at most three, increment rules and stick to them
- Be consistent in your labelling:
    - Be consistent in font usage (choice, size and weight)
    - Make sure everything is labelled – it is easy to miss one
    - Make sure labels are visible and legible
    - Avoid setting text at an angle as it is difficult to read
    - Minimise text on a chart – keep this for your written commentary (which should accompany each chart)
- Colour – this can make a chart 'pop' but can also be distracting.

    - Choose a colour palette at the outset and use it consistently. For example, if you choose yellow for self-employed people, make sure you use yellow (and the same yellow) in all chart bars, lines or segments that relate to self-employed respondents. You can use a separate accent colour to highlight significant data.
    - Do not use red for negative numbers as it has too strong an association in most people's minds and therefore could lead to misunderstanding. Use a neutral colour for all numbers, such as black.
    - Avoid using more than six colours in a single chart. Instead, use shades or a single colour, from your colour palette

Tips for designing tables:

- Design tables for people who do not read tables often.
- Labelling
    - Be consistent in font usage (choice, size and weight)
    - Make sure everything is labelled – it is easy to miss one
    - Make sure labels are visible and legible
    - Avoid setting text at an angle as it is difficult to read
- Use footnotes where more explanatory text is required and so minimise text within the table.
- Right align numbers in columns.
- Left align text in columns.
- Left align row labels.
- Centre column labels.

Disseminate and share your results

Once you have used the LMI Toolkit to set up your survey and have collected data you are encouraged to share that raw data with Historic England through the Sustainable Labour Market Intelligence Toolkit group on Heritage Workspace at: https://khub.net/group/sustainable-labour-market-intelligence-toolkit

- If you have not previously used Heritage Workspace, you will need to set up an account. Instructions for joining can be found at: www.khub.net/historicengland
- If you already have an account, click on the link to the group and 'Request to Join' to enter the community.

We have included a data sharing spreadsheet example format in Appendix 1. There is a column for each answer option to each question and a row per respondent. So, if you have 200 responses, there will be 200 rows in the spreadsheet (plus header rows).

You can use the data sharing spreadsheet example format provided as a guide or provide data in some other way that enables Historic England to analyse and compare your data with that of other Toolkit users.

Archive your outputs

A properly curated and accessible archive is a key product of any research project and is just as important as a project's more high-profile outputs, like a published report. An archive should be systematically organised as it is acquired following current standards for creation, maintenance, ordering, formatting and indexing.

Your organisation may have its own procedures and guidelines for archiving the products of your research. For example, the Chartered Institute for Archaeologists deposits its data with the Archaeology Data Service.

Additional guidance for qualitative research

Qualitative research is used to gain an understanding of underlying thoughts, opinions and motivations. Methods include in-depth interviews and focus groups with small numbers of respondents. Analysis is non-statistical, exploratory and/or investigative. It can generate a deep understanding of respondents' views. Findings are not conclusive and cannot be used to make generalisations about a population. It can be used to develop an initial understanding and sound base for further decision-making, to find out how a sample feels about certain ideas, and to form hypotheses.

The stages of qualitative research include Research planning, Respondent recruitment, Data collection, Data analysis and interpretation, Reporting and Presentation.

Qualitative research methods include:

- In-depth interviews
  An in-depth interview is simple conversation where a respondent's perspectives are explored on a particular program, idea, or subject. Usually lasting an hour maximum, in-depth interviews can involve a single respondent or up to three. There is usually a single moderator who will employ a structured, semi-structured or unstructured approach. Many researchers use a blend: some structure ensures a range of topics are covered, for example using a discussion guide, while unstructured elements allow the respondent(s) to speak freely. In-depth interviews can be held online and over the telephone as well as face-to-face.

- Focus groups
  In a focus group, a small group of respondents – usually six to eight – participate in a group discussion, guided by a moderator. Similarly to an in-depth interview, a focus group can be used to explore a variety of different issues, to test solutions, to explore a group's perspective of a problem and to generate ideas. Focus groups can be structured, semi-structured or unstructured and often have a blend of approaches. They can be held online or over the telephone, but are more commonly held face-to-face as managing a group discussion is easier when everyone is in the room. A moderator can also pick up on non-verbal communications more readily when face-to-face with respondents.

- Participant observation
  This qualitative research technique is more common in social sciences and in consumer product research, but can have other applications. Rather than a moderator-led discussion, respondents are asked to discuss subjects amongst themselves and/or to complete tasks, for example use a certain product. The moderator observes them directly, live. Participant observation is often filmed so that behaviours can be analysed at a later date.

Key elements of a qualitative member survey:

- Sampling technique – because of the relatively small number of respondents in most qualitative research projects, the sampling technique is likely to be purposeful sample (based on your research design) or quota sampling.

- Discussion guide – this is a list of key topics to be covered by the moderator at each focus group. In qualitative research, you do not ask respondents a predetermined list of questions, with set answer options. The discussion guide is the qualitative equivalent to a questionnaire. It ensures all respondents discuss the same subjects to enable comparisons between focus groups or interviews.

- Moderator – the person leading and/or carrying out the interview or focus group.

- Recruitment – try to secure a good mix of respondents in a qualitative research project. This can be challenging and we recommend including a recruitment stage in your research process to focus resources on this task. Recruitment can be done face-to-face, online via a form, by email or by telephone. If you decide to recruit by telephone, a recruitment questionnaire should be developed to assist the person recruiting. You can ask several questions – we recommend no more than five. The answers to these questions should provide enough information about a potential respondent to enable you to decide if you want them to take part in your qualitative LMI research project. You may have a small sample size or you may have certain employer organisations that you really need to take part in your qualitative LMI research project. If so, we suggest proactively and directly contacting these organisations or individuals where necessary.

- Recordings and transcriptions – It is common practice to record qualitative research discussions, as this aids understanding and means the moderator is not required to take notes. The recordings are transcribed so they can be used as the basis for analysis, interpretation and reporting. Recordings and transcriptions are confidential and are not shared, in line with data protection rules. It is important that you inform your respondents in advance that you will be recording the discussion.

- Incentive – It is not uncommon to offer an incentive to potential qualitative respondents in order to secure their participation. It is a tactic designed to maximise participation. There are two ways of offering an incentive. Firstly, a 'prize draw' open to all participants where one prize or a small number of prizes are given. Alternatively, something can be given to all participants.

- Possible respondent incentives:

    - Prize draw
    - Discount on a publication
    - Discount on an event ticket
    - Membership fee discount
    - Voucher for all respondents
    - Cash

IMPORTANT NOTE ABOUT CASH INCENTIVES:

Cash incentives are more common when respondents are expected to attend face-to-face focus group or in-depth interviews. The cash payment is designed to compensate respondents for their time, travel costs and any other out-of-pocket expenses they may incur as a result of agreeing to participate. It is not an inducement to behave in a certain way. Market Research Society guidelines state that cash incentives are appropriate if they are ‘reasonable and proportionate’. We recommend a cash incentive in the £25 to £75 range. It is important that you require each respondent in receipt of a cash incentive to sign for it as proof of receipt.

- Travel bursary – like an incentive, a travel bursary is designed to maximise participation and pay respondents their travel costs incurred as a result of agreeing to participate. It is important that you require each respondent in receipt of a travel bursary payment to provide receipts for their travel costs.

- Location – assuming you are considering setting up face-to-face in-depth interviews or focus groups, you should consider location. The choice of location may be influenced by:

    - Where your potential respondents live
    - Where your potential respondents work
    - Availability of free (or inexpensive) venues
    - Availability of appropriate venues
    - A desire to carry out in-depth interviews or focus groups in different parts of the UK (or overseas), for example at least one in each of England, Scotland, Wales and Northern Ireland
    - Public transport link, to discourage use of cars

Combining quantitative research and qualitative research can be a good way to achieve a rounded and more complete view. Qualitative research can come first, to inform the questions you ask in the quantitative element, so making it more effective. Or, quantitative research can come first, and any interesting findings can be investigated more deeply through a subsequent qualitative stage.

Glossary

Accreditation:
To be officially recognised or accepted or approved of by a professional body.

Chart:
Data displayed in the form of a graph or similar diagram.

Commentary:
The written expression of your opinion or explanation about a particular result or piece of data generated from your LMI research project. You may wish to include commentary on the results of each question in your online LMI survey. This helps to generate labour market intelligence from labour market information.

Conclusion:
This is a judgement reached by reasoning. You may wish to include conclusions throughout your LMI research project report, or at the end.

Demographics:
Statistical data relating to a population and particular groups within it, in this case the respondents to your LMI research project.

Focus group:
This is a qualitative research method where a pre-selected group of people assemble to participate in a structured discussion about a particular topic.

Freelancer:
A way of working that can be described as an individual who works on different projects for different clients instead of being a company employee.

Heritage:
Heritage can be defined as the immoveable and moveable physical objects, artefacts and intangible attributes, practices or characteristics of a country or society that are passed down from one generation to the next. This can include physical evidence of the past in archaeology, historical sites and buildings and the natural environment. It also includes conserved and preserved moveable items of many different kinds that provide a concrete basis for ideas. Intangible cultural heritage, in the form of attributes, practices or characteristics, includes amongst other things, the performing arts, language, rituals and festivals and traditional crafts and skills. These are considered collectively as the inheritance of present-day society.

Heritage assets:
Usually this means physical immoveable and moveable objects, artefacts, etc. But the term can also describe intangible heritage attributes, practices or characteristics. It is generally used to denote heritage value.

Heritage clients:
In the context of this project, heritage clients are defined as all those in need of labour that can supply *specialist heritage skills*.

- Owners and managers of listed buildings and historical sites (private, commercial and institutional)
- Owners and managers of natural heritage assets (parks, gardens, etc)
- Owners and managers of private collections
- Auction houses, antique dealers
- Government
- Charities
- Non-governmental agencies
- Local authorities
- Building contractors
- Property developers
- Infrastructure developers
- Cultural organisations – museums, libraries, archives, churches, galleries, theatres and other performance spaces

Heritage project:
A heritage project is any carefully planned enterprise, activity or task designed to achieve a particular aim regarding the investigation, protection, preservation, conservation, renovation, restoration or development of immovable and moveable physical objects, landscapes, artefacts and intangible attributes, practices or characteristics of a country or society.

Heritage space:
In the context of this Toolkit, the heritage space is an umbrella term for the sectors and subsectors of the economy that could reasonably be deemed to be concerned, solely or in part, with heritage.

Heritage workforce:
The heritage workforce is defined as those with specialist heritage skills and services. This can include employed and self-employed people in the private sector and/or the public sector, both national and local, and in the not-for-profit or third sector. It can also include work-based trainees, volunteers and people from overseas offering their services in the UK. It does not include customer service staff, guides, cleaners, administrative staff and others who do not have specialist heritage skills and services.

Historic England:
Historic England is an executive non-departmental public body of the UK Government sponsored by the Department for Digital, Culture, Media and Sport. It is the public body that helps people care for, enjoy and celebrate England's spectacular historic environment.

Labour market:
The labour market is the interactions between those in need of labour (employers or clients), and those who can supply labour (the workforce). The labour market is in a constant state of

change as it responds to the needs of employers, who in turn respond to influences in the wider economic and political environment.

Labour market information:
Labour market information is the raw data about a workforce such as age, gender, location, role, etc. This can include statistical information gathered through quantitative and structured qualitative methods, as well as insight gathered through qualitative, anecdotal and publicly available information.

Labour market intelligence:
Labour market intelligence is subsets of labour market information data that have been further analysed and interpreted. Labour market intelligence contains labour market information but not the other way around.

LMI research:
A research project set up to collect labour market information or intelligence.

LMI survey:
A research tool/activity used to answer LMI research questions.

Market research:
An action or activity used to gather information about consumers' (or other audiences') needs and preferences.

Median:
The median is the middle value in a series of values arranged in order of size.

ONS:
The Office for National Statistics: the UK's largest independent producer of official statistics and the recognised national statistical institute of the UK. It is responsible for collecting and publishing statistics related to the economy, population and society at national, regional and local levels. It plays a leading role in national and international good practice in the production of official statistics.

Overseas:
Any country or territory outside the UK.

Population:
A population is all (or at least a large collection of) the people, organisations or objects that are the focus of your research.

Qualitative Research:
Qualitative research is used to gain an understanding of underlying thoughts, opinions and motivations. Methods include in-depth interviews and focus group with small numbers of respondents. Analysis is non-statistical, exploratory and/or investigative. It can generate a deep understanding of respondents' views. Findings are not conclusive and cannot be used to

make generalisations about a population. It can be used to develop an initial understanding and sound base for further decision-making.

Quantitative Research:
Quantitative research employs structured methods such as online surveys and/or telephone interviews and generates mainly numerical data that can be displayed in tables and charts and analysed statistically. It is used to quantify data and generalise results from a sample to a population. Findings are conclusive and usually descriptive in nature and are used to recommend a final course of action.

Questionnaire:
A set of pre-determined questions with a choice of answers, devised for the purposes of a survey or statistical study.

Raw data:
The data generated from a questionnaire before any analysis.

Recommendation:
Your recommendations are suggestions or proposals for the best course of action. You may wish to include recommendations at the end of your LMI research project report.

Reliability:
The degree to which research measures something the same way each time it is used, under the same conditions. Does it answer the question it is supposed to answer?

Representative body:
This is a collective term for professional bodies, trade associations and similar organisation that act and/or speak on behalf of individuals or businesses.

Research method:
A research method is simply the tool or technique used to answer your research questions — how you go about collecting your data.

Research methodology:
A methodology is the general strategy that outlines the way in which research is to be undertaken.

Respondent:
A person answering a questionnaire, taking part in a focus group or in some other way taking part in a research project.

Response rate:

$$\frac{\text{Number of people who start survey}}{\text{Number of people in sample}} \times 100\%$$

Sample:
The sum of the respondents in a research project and a subset of the overall population are known as a sample.
Sector:
A distinct part or branch of an economy or industry.

Self-employed:
The act of working for oneself, rather than being an employee.

Skills gap:
A skills gap occurs when an employer considers that an existing employee lacks the skills, knowledge, experience or qualifications to be fully proficient at their job.

Skills shortage:
A skills shortage occurs when employers encounter difficulties finding staff with the appropriate skills, knowledge, experience or qualifications to fill outstanding vacancies at an appropriate wage.

SIC:
The Standard Industrial Classification (SIC) is a system for classifying industries by a four-digit code.

SOC:
The Standard Occupational Classification (SOC) is a common classification of occupational information for the UK.

Sole proprietor:
A person is a sole proprietor if they own a business alone.

Sole trader:
A person is a sole trader if they operate a business alone in an unincorporated business structure.

Specialist heritage skills:
A person has "specialist heritage skills" if they concentrate primarily on a particular heritage subject, activity or specific and restricted field and are demonstrably knowledgeable and experienced in it. This is to be used as a guide only, as there is no official definition.

Staff turnover:
Staff turnover is usually expressed as a percentage. It is the number of workers who leave an organisation or industry as a percentage of the remaining workforce in that organisation or industry.

Subcontractor:
A self-employed individual or a business is a subcontractor if they provide services or perform tasks for a client under specific terms.

Subsector:
A subsector is a smaller part of a distinct part or branch of an economy or industry that can be readily identified.
Survey method:
A research technique used to gather data by asking respondents a series of questions about a particular subject.

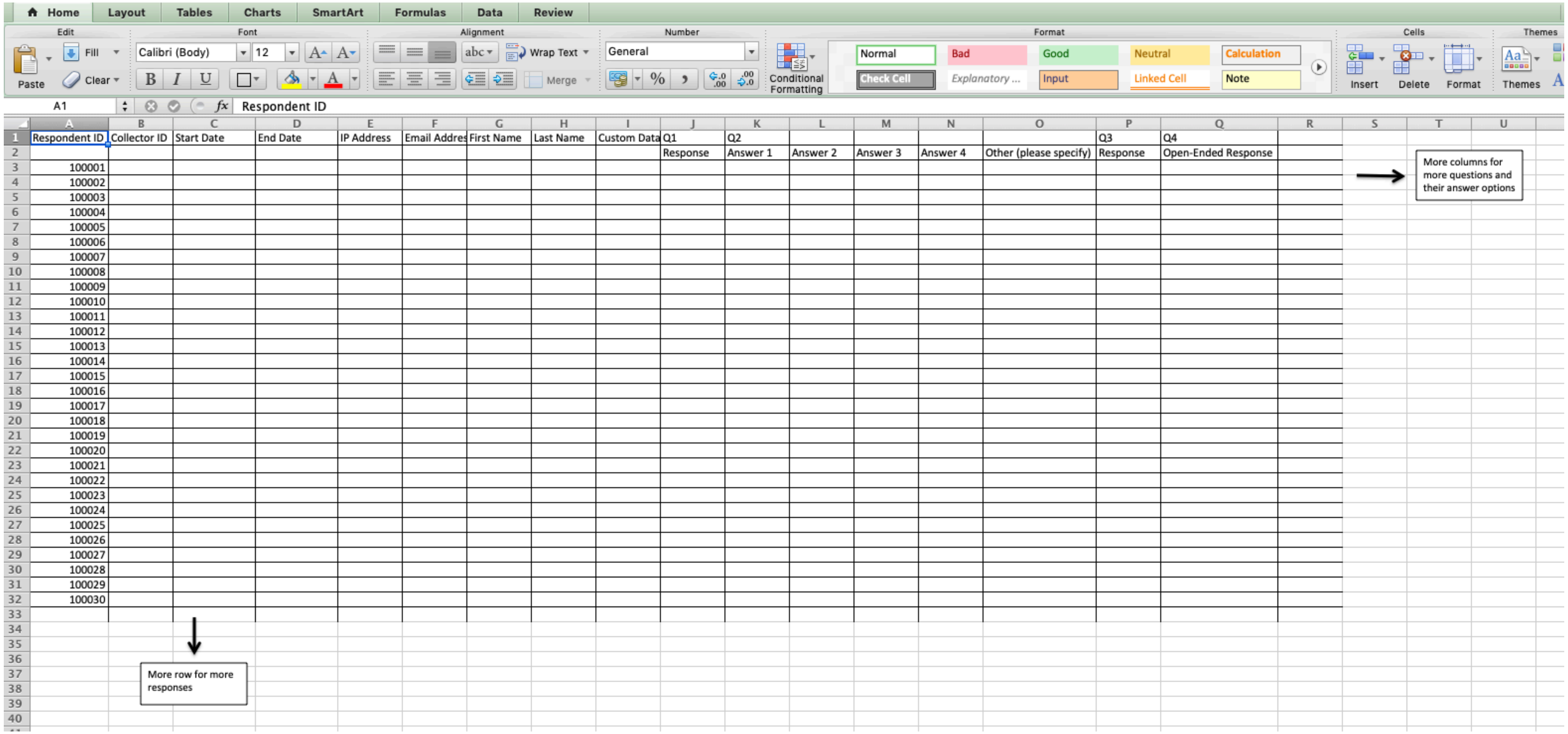
Toolkit user:
A Toolkit user is person who uses the Heritage LMI Toolkit for the purpose of running an LMI research project.

Validity:
Validity is the accuracy of a measurement.

Workforce:
The people engaged in, or available for, work in a country or area or industry.

Appendix 1

Data sharing spreadsheet example format



Respondent ID	Collector ID	Start Date	End Date	IP Address	Email Addres	First Name	Last Name	Custom Data	Q1	Q2					Q3	Q4
									Response	Answer 1	Answer 2	Answer 3	Answer 4	Other (please specify)	Response	Open-Ended Response
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100002																
100003																
100004																
100005																
100006																
100007																
100008																
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