

Re-Imagining Scotland's Heritage Futures: Embedding EDI in everyday practice – Summary Report

Background

On Thursday 16 October an in-person workshop entitled, '*Re-Imagining Scotland's Heritage Futures: Embedding EDI in everyday practice*' was held at St Mungo Museum of Religious Life in Glasgow.

The workshop was hosted by the *Our Past, Our Future* (OPOF) National Strategy Steering Group, developed in collaboration with a Working Group of sector representatives and experts, and facilitated by the National Strategy team. In order to support delivery of Outcome Six of the National Strategy, '*the historic environment is more diverse and inclusive*', the event aimed to:

- **Map Current Activity:** Explore ongoing and planned initiatives addressing diversity and inclusion barriers in participants activities, systems, practice and workforce, identifying overlaps and gaps against current known data and evidence.
- **Foster Collaboration:** Discuss long-term approaches to strengthen collaboration and maximise collective impact acknowledging topics such as accountability, sustainability, data and reporting, financing, advocacy and influence, and knowledge sharing.
- **Identify Future Action:** Co-develop tangible OPOF-aligned next steps to challenge and advance co-ordinated, sustainable, embedded and data-informed EDI efforts.

Attendance

The event was attended by 25 attendees from fifteen different organisations, representing historic environment organisations involved in delivery of Equality, Diversity and Inclusion (EDI) activity, heritage funders, and organisations who support and advocate for change to support inclusion.

Summary of Workshop Content & Discussion

Kirsty Haslam, National Strategy Co-ordinator, and Jilly Burns, National Strategy Programme Manager, provided the initial welcome to the event.

A vision question was introduced, '*Outcome Six of the National Strategy (OPOF) is that by 2028 'the historic environment is more diverse and inclusive' – What will have changed to achieve this?*

Answers provided are captured below:

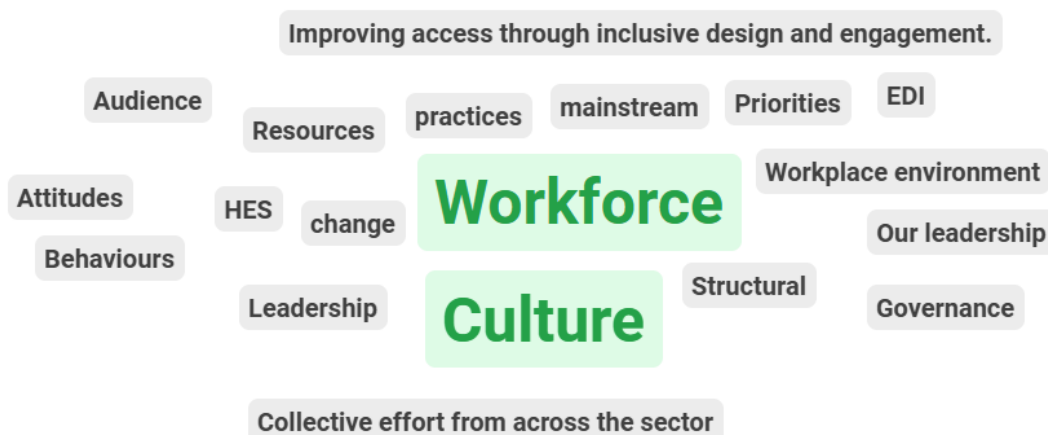


Fig 1. Answers provided in response to the Vision question focused on required changes by 2028 to achieve a more diverse and inclusive historic environment.

10.25 – 10.50: Setting the Scene

Hazel Johnson, Director of Built Environment Forum Scotland (BEFS) and OPOF Steering Group member, introduced the role of the OPOF Steering Group in prioritising delivery activity for the collective, national sector strategy. Hazel noted the focus on the EDI-strand of the national strategy in response to Irene Mosota’s Provocation address at Scotland’s Historic Environment Forum (SHEF) in June 2025. She highlighted that Steering Group representatives were present to listen to attendees as representatives of the sector, to learn, steer and support future prioritisation.

Hazel then asked all attendees to briefly introduce themselves, before facilitating three short presentations:

Wider Context (Irene Mosota, CEO of Knowledge Bridge)

Building from her Provocation at Scotland’s Historic Environment Forum (SHEF) 2025 Irene Mosota, set the context for the day’s discussion. She encouraged attendees to be compassionate and listening, but also highlighted the responsibility of heritage to deliver for communities, recognise their power and ensure heritage was a transforming and safe space for the exploration of stories.

Data Overview (Marjorie Perotto, National Strategy Data Analyst)

Marjorie Perotto, National Strategy Data Analyst shared some observations drawn from the existing data and evidence available to the sector, particularly focused on the Scottish Household Survey and recent research into heritage volunteers and volunteer managers. The demographic profile of respondents shows a sector dominated by mid-

career, highly educated, white, female participants, with limited representation from younger people, ethnic minorities, trans volunteers, and non-Christian faiths. This reflects both structural barriers (qualification expectations, unpaid pathways) and cultural barriers (inclusivity, perceptions of heritage as exclusive). Addressing these gaps will require targeted outreach, alternative entry routes, and stronger EDI practices to ensure the sector reflects Scotland's diverse communities.

Recent research indicates that both volunteers and volunteer managers have approximately the same profile. Encouraging EDI also comes from providing a safe space for underrepresented groups: more volunteer managers from underrepresented backgrounds could reach more volunteers from the same background if they feel seen and safe by managers

Summary of pre-event info (Kirsty Haslam, National Strategy Coordinator)

All attendees were invited to share advance information about their organisation's EDI-focused activity to support mapping, increase the potential for collaboration and support the identifying of gaps in the sector's activity. This information was shared with attendees ahead of the day. Kirsty Haslam, National Strategy Co-ordinator, shared some initial reflections on this information which focused on:

- **Common themes** across organisations: a commitment to inclusion, existing internal EDI training, existing policies, a common interest in diversifying stakeholders
- **Existing Collaboration:** Existing joint projects and cross-sector campaigns, existing resources, training / skills development opportunities between organisations
- **Gaps / Questions:** Under-representation persists; need to consider scaling up/ sustainability; data collections approaches and capacity; do the current structures and systems for the historic environment sector work for this activity.

Workshop One: Acknowledging Barriers and Identifying Existing Opportunities (Facilitated by Tony McCaffery – CEO, Diversity Scotland)

During this session, attendees were invited to discuss three questions in groups. A summary of answers is provided below.

Q1) What are the current barriers you are experiencing in the delivery of your organisations' EDI activity?

Discussed barriers included:

- **Systemic and Structural issues:** Need for buy-in from senior leaders, EDI expertise silo-ed within organisations, embedded imperial legacy with large, often traditional, organisations dominating sector
- **Operational pressures:** staff capacity and burnout, funding constraints, EDI can be sidelined against other organisational demands (need for mainstreaming/embedding)
- **Representation and inclusion:** lack of workforce diversity, communities as recipients rather than co-producers & decision-makers; communities don't see themselves in historic environment spaces /interpretation (heritage 'brand' can be seen as disconnected or problematic)
- **Understanding and confidence:** fear of 'getting it wrong' or backlash; training needs, tick-box mentality
- **Shifting wider context:** political and social backlash requires renewed commitment to EDI activity.

Q2) What would you like to see come from attending the workshop today?

- Learning & Connection
- Leadership and progression of EDI as strategic sector priority
- Cross-sector collaboration, including on messaging
- Practical action

Q3) Acknowledging that barriers exist, what are the existing opportunities for collaboration to increase and embed diversity and inclusion in the historic environment?

Reflections included opportunities to:

- Ensure **collective commitment** from sector leaders, recognising heritage as a platform for courageous conversations in changing political climates
- **Strengthen partnerships and networks**, formal and informal, across the sector with a focus on shared learning and mutual support
- Increase the collection of quantitative and qualitative **data** to inform decision making and evidence impact across projects
- Create **a safe space for honesty, accountability and transparency**, acknowledging that existing policies aren't working or leading to change, but promoting learning over blame
- **Develop accessible pathways** and support for individuals entering the sector, that allow opportunities to engage across organisations
- Increase focus on, and training for, **co-production**

Workshop Two: Prioritising Future Actions (Facilitated by Tony McCaffery, CEO of Diversity Scotland)

Attendees were asked to consider ‘What actions or changes could the historic environment and its adjacent sectors, partners and stakeholders make to better support marginalized communities and deliver on the OPOF commitment that by 2028 *‘the historic environment is more diverse and inclusive’*’

After an initial group discussion, groups selected two priorities to feed back to the room. All attendees were then invited to vote on these priorities and attendee preferences informed the selection of themes for discussion in workshop three.

The identified priorities and votes are recorded below:

- **EDI Funding Needs:** proposal for national EDI forums and professional networks. (10 votes)
- **Embedding Co-production:** what it really means, not just EDI jargon, with data and evaluation to measure EDI impact and show learning in action. (4 votes)
- **Community Focus:** Listen to what people need. (12 votes)
- **Taking a Stand/Leadership:** Being brave and taking a stand as a sector. (7 votes)
- **Data Baseline:** to track change. Ask the good questions, start important conversations. Begin with a workforce EDI audit. Collaboration with partners (and AI) to improve insight. (7 votes)
- **Manifesto:** shared values, case studies, alignment with UN principles. What good looks like through case studies. (6 votes)
- **Representation (Embedding EDI / Influencing real change):** Diversity on boards with EDI to be embedded in all processes including recruitment, language, leadership. (8 votes)
- **Feedback to Funders:** Ring-fenced EDI funding and recognition of role in driving change through funding systems (3 votes)

Over lunch, the OPOF Steering Group representatives, Irene Mosota and the National Strategy team agreed the approach to gather details on how the priority actions could be implemented.

Workshop Three: Next Step Statements (Facilitated by Irene Mosota, CEO of Knowledge Bridge)

Eight identified themes were shared in two rounds with attendees, who were invited to self-select their preferred theme for discussion and move around if they wanted to contribute to more areas. Attendees were encouraged to develop next step statements that considered who, what, when and how these themes could be achieved. A summary of each is provided below.

1) DATA BASELINE (Shared data approach)

WHAT	HOW	WHO	WHEN
<ul style="list-style-type: none"> • Develop sector baseline, to include SIMD / geographical data • Data to understand how diverse the sector is 	<ul style="list-style-type: none"> • Audit the sector’s existing data • Develop tools to standardise collection of data, allowing for greater collaboration • Create sector baseline • Utilise knowledge of adjacent sectors, including academic institutions, with potential for skills exchange and creative thinking 	<ul style="list-style-type: none"> • Requires collaborative buy-in across the sector • Potential to draw in adjacent sector support for research 	ASAP

2) EDI MANIFESTO or CHARTER

WHAT	HOW	WHO	WHEN
<ul style="list-style-type: none"> • Creation of a manifesto, establishing shared values and authority to embed EDI across the sector • To include shared goal statement and measurable pathways to achieving 	<ul style="list-style-type: none"> • Recognised that to ensure ongoing relevance, a manifesto would need to be reviewed and refreshed over time • Importance of accountability and need for an assurance check • Draw on existing examples of manifestos to establish best practice 	<ul style="list-style-type: none"> • OPOF Steering Group (specifically potential for an EDI OPOF sub-group) • WSREC, with support of allies such as HES • A forum to provide accountability 	Before 2028

3) COMMUNITY DRIVEN APPROACH/ FOCUS

WHAT	HOW	WHO	WHEN
<ul style="list-style-type: none"> • Engage / connect with communities on their terms to deliver activities that meet community needs • Understand how communities use and view heritage spaces, not just how the sector defines them 	<ul style="list-style-type: none"> • Acknowledge many communities may access the historic environment without participating directly with historic environment organisations • Safeguard participants from marginalised backgrounds • Consider routes to engagement i.e. utilising different digital platforms for marketing and recruitment • Workforce diversity so communities see themselves in heritage spaces • Partnerships with organisations who can support a communities priority needs i.e. food poverty, housing • Situate within data while acknowledging that not all communities are represented in/ or feel comfortable providing data 	<ul style="list-style-type: none"> • Embed approach across the sector • Acknowledge don't have capacity to engage all communities – responsibility to prioritise both on activity that can be scalable and deliver learning, and reach most marginalised communities • Consider variety of communities: Communities of place can dominate; are communities of interest more important? 	

4) LEADERSHIP/TAKING A STAND

WHAT	HOW	WHO	WHEN
<ul style="list-style-type: none"> • The historic environment sector has a role in engaging with global and social issues • Organisations should be clear about their values, and advertise these (recognising the need to speak from a place of credibility to sustain trust) 	<ul style="list-style-type: none"> • Be brave, and aware that there may be backlash • Recognise the role of the historic environment for learning and developing understanding • Leaders need to safeguard and support their staff who may be at the forefront of any criticism 	<ul style="list-style-type: none"> • Organisations, especially national organisations • Leadership including Trustee and Boards • But also micro-level: individuals within organisations/ communities 	

5) EMBEDDING EDI

WHAT	HOW	WHO	WHEN
<ul style="list-style-type: none"> • Awareness of intersectionality • Transparency, both in activity and through reporting of data • Positive action: co-production, accountability from communities, sharing power 	<ul style="list-style-type: none"> • Ensure representation • Be prepared to share power • Actively state – be welcoming and be clear in what you’re doing to make things open • Meet people where they are • Transparency in annual reporting; honest reflection and acknowledge when actions aren’t successful and are opportunities for learning 	<ul style="list-style-type: none"> • Collective responsibility, with focus on leaders and senior management to create buy-in throughout an organisation • Can’t fall just on EDI Officer or equivalent 	<ul style="list-style-type: none"> • Now • Potential for annual reporting although recognise question of how to build in accountability

6) FUNDING / FEEDBACK TO FUNDERS

WHAT	HOW	WHO	WHEN
<ul style="list-style-type: none"> • Develop two-way process and support • Recognise support resources may need to include other than financial • Develop evidence base including case studies, surveys to demonstrate 	<ul style="list-style-type: none"> • Face-to-face support • Two-way process – co-design rather than extractive • Democratic – involvement of all sizes of organisations • Targeted financial support • Accessibility of applications 	<ul style="list-style-type: none"> • Organisations with specific funding parameters • Non-funders can signpost and share advice 	

7) STRATEGIC DRIVERS

WHAT	HOW	WHO	WHEN
<ul style="list-style-type: none"> • Utilise data to understand who we aren't reaching • Target funding that embeds work • Funders to include an EDI approach • Not funding in isolation • Create a web of support and training 	<ul style="list-style-type: none"> • Embed EDI across funding system • Listen to audience; co-produce and shift balance of power • Development partnerships / 3rd party distribution/ network • Develop mechanisms for accountability 	<ul style="list-style-type: none"> • HES Board to consider new approach to Grant giving • Scottish Government • Need to create a national mechanism to drive change • Citizen Jury? 	<ul style="list-style-type: none"> • 3-5 years

8) CO-PRODUCTION

WHAT	HOW	WHO	WHEN
<ul style="list-style-type: none"> • Training/Skills development for Boards and Funders • Willingness and readiness • Encourage giving away of power / listening 	<ul style="list-style-type: none"> • Free resources for community support groups • Support communities with administration • National Forum to identify work for organisations to lead on • Harness power/influence • Develop toolbox for sector <ul style="list-style-type: none"> ○ Examples of benefits of co-production ○ Training / Skills delivery ○ Reverse mentorship model (e.g. MGS model) ○ Change language (by, not for, the community) 	<ul style="list-style-type: none"> • Organisations taking on projects must take a co-production approach • Need for leadership: focus on developing capacity/ remuneration for those who have less of a voice or voices that haven't been heard • Create a group to inform change 	

14:30 – 15:00: Reflections and Next Steps

Following the group exercise to the priority actions and deliver approaches suggested, responses were offered from:

Irene Mosota, CEO of Knowledge Bridge

Building from her Provocation at Scotland’s Historic Environment Forum (SHEF) 2025 Irene Mosota, reflected that the event showed real commitment to action and connection. She emphasised that participants had linked ideas, shared wisdom, and built relationships that should continue beyond the event. She urged everyone to take collective responsibility as “vision holders,” remain accountable to their communities, and focus on bridging rather than building walls. Irene also highlighted the importance of healing, transformation, and using the power of change to create stronger, more connected, and compassionate communities.

Jilly Burns, OPOF National Strategy Programme Manager

Jilly highlighted what had been communicated by participants, which was a clear stand on what is needed to advance the national strategy and sector interests. She noted strong calls for change, recognised the communicated leadership gap and the need to rethink where power and influence sit. She also welcomed the emphasis on collaboration, building shared evidence, and continuing partnership, while acknowledging that current systems are insufficient to meet shared ambitions. She confirmed that ideas from the event will inform a report for the Steering Group, helping shape future EDI activities under OPOF.

Hazel Johnson, OPOF Steering Group representative

Hazel expressed heartfelt thanks on behalf of the OPOF Steering Group to the organisers and all participants for their generous contributions, insights, and big ideas. She emphasised the shared obligation to turn discussions into action, noting that outcomes will feed into the November OPOF meeting and forthcoming report. Hazel encouraged continued reflection and feedback, inviting participants to share if their voices weren’t heard or to suggest developing priorities. She affirmed that today marks a continuation, not the end, of the conversation.

Post-event feedback

Initial post-event feedback, provided by 21/10/2025, is captured below. The National Strategy team will continue to engage with event participants to record reflections and ensure continued dialogue.

Attendees found the opportunity for peer support which the workshop provided particularly welcome, and the potential for sharing of knowledge and resources on topics such as data capture were also identified. The potential to develop the

relationships established on the day, through media including a forum, mailing list or blog space was noted. The need to seek practical, on-the-ground applications for discussions was highlighted.

Of the eight next-steps statements workshopped, the most popular initially for post-event prioritisation were community focus, data and taking a stand/leadership.

Feedback welcomed the strong presence of sector leaders at the event but noted the potential to widen the conversation. The holding of a similar workshop for public-facing roles, or ensuring engagement of grassroots voices, was specifically identified.

Next Steps

This report will be shared with the OPOF Steering Group and resulting recommendations will be implemented by the OPOF National Strategy team.

Kirsty Haslam
National Strategy Coordinator
October 2025