
The National Portfolio
Investment Programme

2018-22 and 2022-23



Bridge Organisations' prompts and role descriptors

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Introduction

Over the 2022 – 2023 extension year, National Portfolio Organisations are expected to transition from delivery against the Goals of Great Art and Culture for Everyone towards adopting the Outcomes and Investment Principles of our new Strategy Let's Create. We have updated our monitoring prompts to explain how we will continue to monitor our investment in your organisation in light of this change. Goals prompts have been replaced with the set of Activity/ Programme prompts on page 4.

These prompts set out the questions your Relationship Manager will consider whilst reviewing your progress on an ongoing basis, as well as examples of the types of evidence and indicators of success we will look for.

You may also find it helpful to consider these monitoring prompts whilst refreshing your business plans and supporting documents annually.

Activity/Programme monitoring prompts

Our Strategy strives to achieve our vision of a country in which the creativity of each of us is valued and given the chance to flourish, and where every one of us has access to a remarkable range of high-quality cultural experiences.

Supporting the creative lives of children and young people is a high priority in Let's Create. We expect Bridge organisations to consider how to best meet the needs of children and young people, reflecting the Investment Principles and specifically addressing issues of equity and inclusion.

- a). How does the organisation/consortium demonstrate a commitment to artistic/cultural development and quality and are its plans realistic and achievable?
- b). To what extent does the organisation/consortium demonstrate progress against its plans and use available data and resources to revise plans proactively and responsively, including adjusting its business model and/or types and levels of activity as appropriate in response to Covid-19 financial pressures and planning uncertainty?

- c). How does the organisation demonstrate commitment to embedding the Investment Principles (and Outcomes where relevant and possible)?
 - d). To what extent does the organisation/consortium evidence a continued commitment to equality, diversity and inclusion in programming, planning, and delivery?
 - e). How clear are board papers and plans in providing evidence of oversight of the organisation/consortium, in particular in reflecting a shared commitment to embedding the Investment Principles?
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Finance and management

All National Portfolio Organisations are expected to demonstrate effective management, governance and leadership and financial viability. However, we know that some organisations will experience significant difficulty over the funding period due to financial pressures, changes in leadership or other factors. We will be as understanding of the situation as possible.

In each case, we aim to identify organisations in difficulty as early as possible. Some of the early warning signs that we look out for are listed below.

The more detailed prompts that your Relationship Manager will consider whilst reviewing the effectiveness of your management, governance and leadership, as well as financial viability, are set out on pages 6-7.

- Poor financial and other information submitted both to the board¹ and the Arts Council (including weak agendas)
- Adverse financial trends, e.g. declining sales or reserves
- Poor business plans and planning
- Lack of forward planning, future focus and external environmental factors
- Poor risk management, e.g. lack of risk register or risk register is not maintained/updated, stagnant board or difficulty retaining or attracting trustees
- Ambition outstripping resources
- Focus on historic performance rather than future planning

¹ Throughout this guidance, by 'board' we mean a board of directors or trustees, or any equivalent

Management and governance monitoring prompts

All organisations

- a). Is the organisation aware of the **risks** to stability and successful programme delivery, including considerations of external threats? Is there evidence the organisation has identified appropriate **ways of reducing** these risks and is regularly considering and taking action to implement these?
- b). Is the organisation's **management structure, governance arrangements, planning processes and monitoring and reporting** suitable, including scheduled meetings and details of succession planning for key officers and board members?
- c). Is there evidence that the organisation carries out **regular and effective** self-evaluation across finance and all of its objectives?
- d). Is there evidence of clear plans to develop the organisation's **sustainability and resilience** – this could include, but is not limited to, reducing impacts, operations, strategy, stakeholders and partnerships?
- e). Is the board appropriately structured or constituted (this should include information about the diversity of its members) with a clear rationale for its choice of **board structure**?

- f). Are the **board members' skills** suitable in relation to your organisation's mission, activity and management, including responsibilities for diversity and resilience and sustainability? Are their clear plans in place for **recruitment, induction, development and training of board members**?

For **consortiums**, we will also take into account:

- a) Is the consortium's **structure** effective?
- b) Is the **role of the lead organisation** clear and effective?
- c) Are **collective decision-making and communication processes** effective?
- d) Is there a suitable procedure for **resolving disputes** between partners?
- e) Are levels of **shared and delegated responsibility** appropriate?
- f) Is there a clear process for **collecting information** from partners and **compiling consolidated reports**?

Financial viability monitoring prompts

- a). Is the organisation successfully **building on existing earned/contributed income** and actively looking for **new sources of income**? This could include maximising existing income streams and building new sources where appropriate. Are future plans for raising earned/contributed income appropriate and realistic? Are cost assumptions regularly considered?
- b). Is the organisation developing their **resilience**²? Are plans for financial resilience convincing and are they consistent with wider organisational resilience? Are future plans convincing?
- c). Is the organisation **paying artists and practitioners fairly**, following industry guidelines?
- d). Are **financial controls, monitoring and reporting** suitable? Is the **quality of financial documents** submitted to the board appropriate? Is **progress monitored** against plans and are adverse trends factored into decision-making and planning?
- e). Is the organisation effective at maintaining and building **reserves**? Does the organisation have an appropriate **reserves policy** that is adhered to? If not, does it have clear plans in place to rectify this?
- f). Is **overall financial health** considered within monitoring reporting, including key indicators such as sufficient current assets to cover current liabilities, cash flow position and unrestricted reserves levels
- g). Is the organisation actively maximising their **efficiency**? For example, seeking competitive quotes for services?
- h). How has Covid-19 impacted on the organisation's financial and operating model and its financial viability and sustainability, including its reserves position? How has the organisation responded to any financial challenges it has faced, and what are the impacts of any Culture Recovery Fund grants or loans the organisation may have received?

² Resilience is the vision and ability of organisations to anticipate and adapt to economic, technological, environmental and social change by taking opportunities, identifying and reducing risks, and using resources effectively to continue to deliver quality work in line with their mission.

For **consortiums**, we will also take into account:

- a). Is the **financial relationship open and clear** between consortium members?

Appendix A:

Bridge Organisation Framework

2018-22 and 2022/23

This updated framework is applicable to delivery from April 2021 and encompasses year four of the current Bridge funding agreement, and the extension year covering 2022-23. It is an update of and replaces Bridge Organisation Role Descriptors 2018-22. In particular, the framework maps objectives against priorities in our 2020-30 Strategy: Let's Create.

General Expectations

Bridge Organisations will continue to create and deliver against a responsive place-based strategy for cultural engagement which supports outcomes for children and young people. They will play a key role in sustaining a consistent and high-quality arts and cultural offer for children and young people in their area, increasing the number of children accessing arts and culture, and supporting all young people to engage and progress equitably. They will understand and respond to local context/need, supporting and facilitating partnerships and networks which are engaged with by schools, cultural organisations, and cross-sectoral partners.

Bridges will advocate for and support a range of tools, qualifications, and approaches which support learning outcomes. They may also enhance development pathways which will help children and young people embark on creative careers. They will use

partnership investment to help them deliver against their strategy and to support high quality and equitable opportunities for children and young people.

The general approach of Bridges should be to support universal activity within their area of operation by providing/sharing activity, information, and opportunities with schools, cultural organisations, including National Portfolio Organisations, Music Education Hubs and individual artists/practitioners. They should also however make targeted interventions where these are appropriate, to achieve specific outcomes and in response to need. These should take account of the need for dedicated 'place-based' approaches, focusing efforts on areas of particular interest (based on local understanding), where this would be most effective.

Bridge organisations will be expected to respond to local context, circumstance, and need, taking a cross-area or hyper-local approach as appropriate. In order to support this approach, Arts Council England has deliberately reduced the level of specificity in this agreement and any national targets for specific programmes have been removed in the anticipation that Bridge organisations will negotiate at Arts Council area level. They will consider the Arts Council's area intelligence in order to plan effectively and to set appropriate area and local targets based on a more sophisticated and locally specific evidence base.

Partnership Investment

Bridge organisations will continue to agree a partnership investment plan with the Arts Council area team in which they are based. The plan will demonstrate how they are making best use of the potential to secure broader investment which will support equitable engagement by children and young people.

Partnership investment remains an important tool for Bridges to use as a way of bringing in additional investment from sources outside of the cultural and education sectors, and as a way of ensuring the longer-term financial sustainability of Local Cultural Education Partnerships. Bridges should take an approach which articulates how partnership investments will help them to deliver against their responsive place-based strategy for cultural engagement of children and young people, seed/support innovation and cross-sectoral collaboration, and respond to local understanding and to Arts Council area intelligence.

Working with Schools

Schools are key to introducing young people to culture, to driving progression and engagement and to ensuring level access to cultural opportunities. Bridge Organisations will support schools by:

- Encouraging engagement in local networks and partnerships targeting Local Cultural Education Partnerships
 - Encouraging engagement with Music Education Hubs
 - Supporting schools' engagement with Artsmark
 - Signposting cultural partners
 - Providing opportunities to develop and share good practice
 - Encouraging schools to champion cultural learning
 - Advocating for increases in high quality engagement opportunities.
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Mapping Bridge objectives to Let's Create

Outcome 1: Creative People

- Support Artsmark delivery in area
- Support schools, cultural organisations, and individual artists/practitioners to access information, advice, learning, tools, approaches, and activity, enabling equitable opportunity for all children and young people

Further detail on deliverables and expected outcomes is provided on the following pages.

Outcome 2: Cultural Communities

- Support the ongoing development of a vibrant, cohesive, and responsive cultural education infrastructure in order to support equitable opportunities for children and young people

Outcome 3: A Cultural and Creative Country

- Build on organisational strengths to offer practical support, insight and leadership at a national level where appropriate
 - Work with other Bridge organisations to share knowledge and ensure a cohesive offer for all young people across the country
 - Keep informed on emerging trends and priorities in national policy, including latest Arts Council England thinking
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Outcome: Creative People

Deliverable: Support Artsmark delivery in area

Detail:

- Encourage school registration and sustained engagement by delivering briefing sessions, surgeries, one-to-one support, peer learning, and development days
- Support schools to develop and submit a Statement of Commitment
- Connect schools to cultural organisations which can offer support
- Support cultural organisations to understand and engage, and to develop a clearly articulated offer for schools
- Support and celebrate the Artsmark community with celebration events, communications support, and by recognising achievement and leadership within schools

Expected outcomes:

- The local offer is consistent, responsive, and place-based
- Overall rates of engagement with Artsmark are increased
- Schools commit to the journey, progressing from registration through to submission of a Statement of Commitment
- Improvements are seen in the least engaged areas and amongst the least engaged groups
- More arts and cultural organisations understand and engage with Artsmark

Outcome: Creative People

Deliverable: Support schools, cultural organisations, and individual artists/practitioners to access information, advice, learning, tools, approaches, and activity, enabling equitable opportunity for all children and young people

Detail:

- Highlight advice, information, and opportunities to all schools and relevant cultural organisations and individual artists/practitioners
- Target schools in particular places, supporting their connections and engagement with cultural organisations, opportunities (including Artsmark), and networks/partnerships (including but not exclusive to Local Cultural Education Partnerships)
- Support artistic leadership in schools and beyond through networks, peer-learning, and information sharing
- Support targeted interventions for particular groups of children and young people based on context, data, and understanding of need. For example, looked after children, refugees, children and young people experiencing disadvantage
- Target specific gaps in provision or opportunity. For example, early years, careers pathways
- Advocate and share information about a range of approaches, qualifications, and tools (in particular Arts Award) which will support school development and learning outcomes for children and young people

Expected outcomes:

- Increased numbers of young people – especially those from diverse backgrounds – are engaging with a high-quality offer, in and out of school
- Every young person has the opportunity to access high-quality arts and cultural provision, and the gap in engagement levels by children and young people who face particular barriers has narrowed.
- More schools embed planning for the arts in school improvement plans, employing a range of tools and approaches to support learning outcomes
- There are increased resources for cultural activity from a diverse range of partners and artists
- Practical consideration of diversity and inclusion is integral to the offer

Outcome: Cultural Communities

Deliverable: Support the ongoing development of a vibrant, cohesive, and responsive cultural education infrastructure in order to support equitable opportunities for children and young people

Detail:

- Develop and maintain a picture of the local cultural offer which is informed by data from a variety of sources (including Arts Council England) and by other evidence
- Galvanise partnerships and relationships which represent a full range of cross-sectoral stakeholders. For example, early years organisations, cultural organisations, Music Education Hubs, schools, youth and community organisations, Further and Higher Education, local government and services, libraries, Local Enterprise Partnerships, social enterprises, private companies and individual artists or practitioners
- Provide developmental and strategic support to Local Cultural Education Partnerships, relevant to their stage of development and need, and in response to a place-based strategy. This may include: helping them to evidence effective delivery; quality assurance; supporting the development and momentum of the partnership; considering sustainability and legacy; and/or support to embed Quality Principles, Artsmark, and tools and qualifications which support structured learning outcomes (in particular Arts Award)
- Identify and engage with other/existing partnerships, offering time-limited support around specific tasks and activity where appropriate to place-based delivery

Expected outcomes:

- The consistency, quality, reach, and quantity of arts and cultural provision for children and young people has measurably improved
- Increased numbers of young people – especially those from diverse backgrounds – are engaging with a high-quality offer, in and out of school
- Every young person has the opportunity to access high-quality arts and cultural provision, and the gap in engagement levels by children and young people who face particular barriers has narrowed
- There are increased resources for cultural activity from a diverse range of partners
- Children and young people's voices are more evident in schools and cultural providers' arts planning and provision
- Practical consideration of diversity and inclusion is integral to the offer

Outcome: A Creative and Cultural Country

Deliverable: Build on organisational strengths to offer practical support, insight and leadership at a national level where appropriate

Detail:

- Using experience, evidence, and learning to contribute to national conversations about cultural learning
- Offer support or direct delivery of activity/services to the wider Bridge cohort, to the sector or to schools nationally, on areas of particular expertise or focus. For example, early years, youth sector, careers, deaf and disabled children and young people, digital innovation, youth voice, environmental sustainability
- Opportunities to research and test innovative approaches across a wider cohort and as part of an expanding range of tools

Expected outcomes:

- Bridges are able to play a national and co-ordinated role in shaping the debate or improving the quality of the offer for children and young people across England in a specific area of expertise
- Good practice and learning is shared across the network of Bridge organisations, and the specific areas of expertise developed by individual Bridges can be utilised and celebrated at a national level

Outcome: A Creative and Cultural Country

Deliverable: Work with other Bridge organisations to share knowledge and ensure a cohesive offer for all young people across the country

Detail:

- Share data, evidence, learning, and effective practice with the Bridge network (including around Artsmark provision) in order to inform/shape shared sector delivery
- Collaborate with other Bridge organisations to deliver sector development activity including events, training, and support

Expected outcomes:

- There is consistent delivery across the Bridge network, ensuring equity for all Artsmark schools across England
- There are increased opportunities for local programmes to be celebrated and profiled at a national level
- There are increased opportunities for young people to access national opportunities
- There is understanding across the Bridge network of shared challenges, opportunities, and priorities

Outcome: A Creative and Cultural Country

Deliverable: Keep informed on emerging trends and priorities in national policy, including latest Arts Council England thinking

Detail:

- Work closely with Arts Council areas to understand and agree shared priorities, to understand emerging thinking, and to share intelligence
- Understand and respond to Let's Create and relevant investment principles
- Keep abreast of the latest evidence and research relevant to Bridge functions, to feed into future planning and delivery of current activity

Expected outcomes:

- Bridges are able to adapt programming to respond to the latest information, evidence, and thinking

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QUESTIONS? GET IN TOUCH — WE'RE HAPPY TO HELP

Reach our Customer Services team here:

Telephone	0161 934 4317
Email	enquiries@artscouncil.org.uk
—	
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