
–
The National Portfolio
Investment Programme

–
2018-22



Bridge Organisations' prompts and role descriptors

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Introduction

Throughout the lifespan of your grant, we will monitor your performance against the Arts Council's goals, as well as management and governance and financial viability. We have published this set of monitoring prompts so that so that you can understand how we will monitor our investment in your organisation.

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.

Goal 5

monitoring prompts

Every child and young person has the opportunity to experience the richness of the arts, museums and libraries

Our strategy, *Great Art and Culture for Everyone*, talks about how arts, museums and libraries fuel children's curiosity and critical ability. They are about expression and imaginative escape as much as they are about learning and development, helping children and young people to explore, understand and challenge the world, as well as their place in it. They inspire future audiences, and through work produced by and with children and young people, encourage the next creative generation. We believe it is every child's birth-right to develop their own creativity, experience the arts, access the knowledge in our libraries, and see the wonderful objects within our museums and learn about the stories behind them. It is important that children and young people are able to experience and participate in arts and culture and can continue to do so throughout their lives. We expect that many organisations will also want to demonstrate their contribution to goal 5 and how they will work with others to fulfil their aims and objectives.

- a). Is the organisation providing a **universal offer** to disseminate information, targeting all schools, cultural organisations and Music Education Hubs?
 - b). Is the organisation providing a **targeted offer**, galvanising and developing specific networks and Cultural Education Partnerships in places agreed with us?
 - c). Is the organisation achieving a minimum **100 per cent match** of their annual **Partnership Investment** budget?
 - d). Is the organisation achieving a **50 per cent target for Artsmark** in the geographic area covered by the Bridge Organisation?
 - e). Is the organisation achieving a **30 per cent annual growth in moderations for Arts Award**?
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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
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Management and governance monitoring prompts

- 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?

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

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

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

Appendix A: Bridge Organisation role descriptors 2018-22

Supporting the Cultural Education Challenge – Artsmark delivery

Bridge Organisations will support Artsmark Award's national offer to schools. They will drive schools' uptake of Artsmark to registration at least 50 per cent of all schools by July 2020. They will deliver Development Days and support schools to develop and submit their Statement of Commitment. We want to see the conversion from registration through to submission of a Statement of Commitment. They will deliver peer learning surgeries to support schools on their Artsmark journey.

Bridge Organisations will also develop and deliver an Artsmark community offer in line with the core roles of a Bridge Organisation as outlined in Bridge funding agreements. Bridge Organisations will organise regional celebration events for awarded schools and encourage schools to re-register for Artsmark. Bridge Organisations will work with and support cultural organisations to understand the education sector and develop quality offers to support Artsmark schools. As with all Bridge activity, the impact should be measurable. Bridge Organisations should have a clearly outlined offer on their website, making it easy to understand how they can help and a clear distinction and rationale between Bridge and non-Bridge work.

Advocacy, briefings and information sharing**Encourage school engagement through detailed briefing sessions/surgeries/one-to-one sessions:**

- general overview of Artsmark Award
- benefits of Artsmark as a vehicle for school development
- embedding arts and culture across the curriculum
- Quality Principles and how to use them
- how to register for Artsmark Award
- additional support and resources
- using Pupil Premium to support arts and cultural opportunities for pupils
- Could be part of broader briefing sessions delivered by Bridge Organisations

Support cultural organisation's understanding of the education sector and needs of schools and how Artsmark can support a quality cultural education offer in schools through briefings and one-to-one support:

- general overview of Artsmark Award
- benefits of Artsmark as a vehicle for school development
- embedding arts and culture across the curriculum
- Quality Principles and how to use them
- understanding of how Artsmark can support the Cultural Education Challenge through schools
- how cultural organisations can engage with Artsmark

Support cultural organisations to develop a clearly articulated Artsmark offer:

- set targets of priority organisations who should have a clearly articulated Artsmark offer on their website
- provide examples of best practice
- promote the benefits of becoming an Artsmark supporter

Development Day and support for schools

Delivery of development days for registered schools:

- within one term of registering
- overview of Artsmark Award journey
- self-assessment of current provision
- ambitions for development and writing the Statement of Commitment
- embedding arts and culture across the curriculum
- evaluation and impact
- peer learning
- planning for and writing a good case study
- additional support and resources
- benefits of working with Arts Award
- working with cultural organisations

Support schools to develop and submit their Statement of Commitment:

- within one term of a school attending a Development Day
- clear understanding of purpose at Development Day
- provide one-to-one sessions, surgeries to support Statement of Commitment writing
- support termly deadlines through follow up emails to schools one month following their Development Day

Delivery of peer learning surgeries for Artsmark schools:

- facilitate peer learning between schools
- focused support of key areas of Artsmark journey including developing the Statement of Commitment and putting together a case study
- work with Artsmark team to identify key areas of development highlighted in Statement of Commitment to provide support. These may include sessions on evidencing impact and fundraising and income generation
- use school ambassadors to share best practice
- encourage peer support through formal and non-formal school networks

Development Day and support for schools**Signpost and connect schools to cultural organisations who can offer support:**

- visiting speakers or market place events
- host an up-to-date database of cultural organisations across the Bridge area on their website

Work with cultural organisations to develop case studies for the Artsmark website of how they can support schools at the planning stage of their Artsmark journey:

- invite cultural organisations as guest speakers at development days and surgeries to provide an overview of how they can work with schools and the support they can offer

Link Artsmark Award to the Cultural Education Challenge:

- support school engagement in Local Cultural Education Partnerships
- encourage schools to join or lead Local Cultural Education Partnerships
- ensure that all cultural organisations in a Local Cultural Education Partnerships area have a clearly articulated offer on their websites

Celebrating Artsmark schools and added value support**Host local celebration events for schools who have been awarded an Artsmark level (silver, gold or platinum):**

- support school promotion of award through social media, newsletters and blogs

Deliver an Artsmark Community programme that offers:

- excellent profile for Artsmark schools
 - regional award ceremonies
 - communications support
 - attendance at national celebration events hosted by the Arts Council
- opportunities to be recognised for and demonstrate leadership with peers
 - liaise with schools and identify appropriate opportunities to use their skills and expertise and be seen to value this
- increased access to the work and opportunities delivered regionally by Bridge Organisations
 - schools signed up for bulletins/e-newsletters to keep in touch with arts and cultural developments and opportunities across the region
 - connect schools with access to the relevant Bridge services around Schools and Cultural organisations searchable databases (each Bridge Organisation should be developing this as an offer)
 - occasional priority offers from high quality arts and cultural organisations locally and regionally

Support cultural organisations to engage with Artsmark:

- how cultural organisations can support schools to achieve Artsmark
- case studies and examples of best practice
- bring cultural organisations and schools together to encourage dialogues that lead to a demand-led offer for schools
- support cultural organisations to engage with Arts Award

What will success look like?

Specific figures for each Bridge Organisation will be negotiated with the Senior Officer Artsmark, taking into account the Bridge context:

- At least 50% of all schools registered with Artsmark by July 2020.
- Increase in school registrations*
- Conversion of school registrations through to Statement of Commitment submission
- Evidence of progression through Artsmark stages:
 - All schools to attend a Development day within one term of registration
 - All schools to submit a Statement of Commitment within one term of attending a Development Day
- An increase in the quality and authenticity of Statement of Commitments submitted
- Consistency of delivery across Bridge network to ensure equality of opportunity for all Artsmark schools across the country
- A clear and consistent Artsmark community offer for all Artsmark schools

Supporting the Cultural Education Challenge – 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 the Local Cultural Education Partnerships; engagement with Music Education Hubs: supporting schools' engagement with Artsmark and Arts Award; signposting cultural partners; providing opportunities to develop and share good practice; encouraging schools to champion cultural learning; and advocating for increases in high quality engagement opportunities.

Our ambition is for a universal offer to schools but, with finite resources, Bridge support is divided into a universal offer – information sharing – and a targeted offer – participation and engagement in Local Cultural Education Partnerships, work with Music Education Hubs, and strategic leadership and engagement.

Bridge support for work with schools should focus on Local Cultural Education Partnerships but not exclusively, and, where appropriate, on work outside a current Cultural Education Partnership.

* *It is not acceptable for Bridge Organisations to subsidise the cost of Artsmark for schools or to make any connected offers or schemes which may, in effect, also act to subsidise Artsmark*

<p>General information sharing – universal offer</p>	<p>Bridge offer highlights opportunities for arts and cultural organisations and schools to include:</p> <ul style="list-style-type: none"> • updates on cultural learning and education • opportunities to work together • dissemination of effective practice supported by evidence of impact • information regarding funding streams • signposting of pathways into creative and cultural sector
<p>Music Education Hubs – targeted offer</p>	<ul style="list-style-type: none"> • connectivity with the arts and cultural ecology within the area to include the Local Cultural Education Partnerships and area networks to support Music Education Hubs' core and extension roles • support to embed Artsmark, Arts Award and Quality Principles
<p>Active participation and engagement – targeted to, but not exclusive to, Local Cultural Education Partnerships or areas where a Cultural Education Partnership may emerge</p>	<p>Bridge Organisations explore solutions with schools and cultural organisations to initiate partnerships to include:</p> <ul style="list-style-type: none"> • use of schools data and Arts Council data including Music Education Hub data, to analyse need and plan provision • specific information, advice and guidance on working with cultural partners and schools • supporting active engagement by schools in cross sector networks, partnerships and planning phases for Local Cultural Education Partnerships • peer networks • support to enhance schools' cultural offer to include Artsmark and Arts Award • continued professional development and training opportunities • leadership briefings

Strategic leadership and engagement – targeted offer

- development of schools with particular strengths to take a lead role in initiating inter-school cultural learning activity and disseminating best practice
- development/enhancement of the strategic role of leaders in education
- development of champions in schools and networks by identifying and supporting teachers who can lead and advocate for cultural learning
- creating opportunities, through collaboration and governance, for schools and cultural organisations to become more influential in each other's policy development and practice
- shaping of joint cultural and education sector professional development interventions

What will success look like?

- Increased numbers of children are able to engage with high quality arts provision in or out of school
- More schools embed planning for the arts in school improvement plans
- Increased engagement with Arts Award from schools and arts and cultural organisations, contributing to a 30 per cent annual growth in moderations

Supporting the Cultural Education Challenge - Local Cultural Education Partnerships

Bridge Organisations will use their expertise to galvanize partnerships across the arts, cultural and education sectors to support a clear articulation of a local cultural offer and engage more young people with high quality arts and culture. Bridges will create new partnerships or enhance existing ones where demand and potential is greatest, particularly in places where there is a gap in engagement. Places will be identified in partnership with Arts Council England.

Our ambition is for a universal offer but with finite resources; the number and location of Bridge supported Local Cultural Education Partnerships will be targeted and match existing resources.

Local Cultural Education Partnerships should be evidence based and the impact should be measurable.

How will they do this?

Cultural education profiles

Develop a picture of the cultural offer using quantitative and qualitative evidence:

- map existing partnerships and identify gaps and opportunities
- use evidence to agree with Arts Council England where new, pre-existing, nascent or re-ignited partnerships could greatly improve the cultural offer for children and young people, particularly those from the least engaged groups
- profiles are not restricted to local authority boundaries and can, for example, reference teaching school alliances, academy chains, Local Enterprise Partnerships or the cultural infrastructure
- places will be identified in partnership with Arts Council England and cross referenced to other Arts Council England place based activity
- analysis of need and planning provision using a range of data sources including Arts Council England data – cultural education data portal, National Portfolio Organisation annual survey data, Music Education Hub data, Artsmark and Arts Award data

Galvanising partnerships

- partnership groups should represent a full range of stakeholders – early years organisations, cultural organisations, Music Education Hubs, schools, informal youth sector organisations, further and higher education, local government, libraries, Local Enterprise Partnerships, social enterprises and private companies
- high level support from senior leaders in local authorities
- support to partnerships to establish membership, sector leadership, terms of reference, plans, communication strategies and budgets
- partnership plans will establish shared strategic vision and aims and consider: local needs and the local cultural infrastructure; the delivery partners; Quality Principles; use of digital media; progression routes; school needs; success measures; sustainability; and how young people will be involved in the design. Clear targets will be established

Delivery phase

- activity should encompass arts and cultural provision for children and young people aged 0-25 years
- Bridge Organisations ensure Artsmark, Arts Award and the Quality Principles are embedded in each Local Cultural Education Partnership
- Local Cultural Education Partnership working practices are established, embedded and sustainable within localities
- schools and cultural providers better understand each other's needs and offers allowing for better matching of resources
- Bridge Organisations use partnership investment to support Local Cultural Education Partnerships (see partnership investment guidelines)
- practice sharing and reflection co-ordinated by Bridge Organisations leading to stronger partnerships, improved programme design and provision on the ground
- better sign posting and progression routes for young people who want to extend learning and engagement in the arts
- Bridge Organisations step back and delivery partners take over
- Bridge Organisations retain a strategic overview of partnerships
- Bridge Organisations support Local Cultural Education Partnerships to evidence the impact of their activity

What will success look like?

- The consistency, quality, reach and quantity of arts and cultural provision for children and young people across England has measurably improved
- Increased numbers and more diverse children and young people are engaging with a high quality arts and cultural provision, 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 of children and young people who face particular barriers in accessing culture has narrowed
- Clearer pathways to support talent development resulting in more children and young people progressing to creative careers
- Increased resources for cultural activity for children and young people from a diverse range of partners
- Children and young people's voices more evident in schools and cultural providers' arts planning and provision
- Increased engagement with Arts Award from schools and arts and cultural organisations, contributing to a 30 per cent annual growth in moderations

Supporting the Cultural Education Challenge - partnership investment

Bridge Organisations will allocate no less than 25 per cent of their budgets as partnership investment to support the development of Local Cultural Education Partnerships. Partnership investment is to act as match funding that will attract and secure new sources of money not traditionally spent on arts and culture for children and young people in the Local Cultural Education Partnership area. It should result in measurable increased investment from partners in response to a strategic challenge the partnership has identified in its cultural education work locally.

Sources can include, but are not limited to: local authority budgets, children's/ youth services, looked after children budgets, Local Enterprise Partnerships, health, housing, schools, academy chains, Pupil Premium, Sports Fund, further and higher education, library services, Music Education Hubs, the private sector, and trusts and foundations. It can in some cases also be used to lever new levels of investment from existing sources. Partnership investment must match up to 100 per cent of the co-investor's money and it is desirable to achieve a greater than one-to-one leverage.

Bridge Organisations should publish the partnership investment opportunity and process agreed with Arts Council England. The Local Cultural Education Partnerships should apply with supporting evidence from their potential funder to the Bridge Organisation. Decisions should be made by the Bridge governance group. Payment conditions and progress should be administered by the Bridge and monitored by the Bridge governance group.

How will Bridge Organisations do this?

Creation of a partnership investment plan

Aims:

- the investment process will be transparent and developed in collaboration with Arts Council England, taking consideration of other Arts Council initiatives and investments locally
- to include innovative models of demand led activity
- to be focused on the Local Cultural Education Partnerships agreed with Arts Council England or in response to **exceptional** investment opportunities
- cultural organisations will be supported to develop sustainable outcomes and focused relationships with new strategic partners

Specific requirements:

- the partnership investment plan will include increased cultural opportunities for children and young people including Artsmark and Arts Award targets and use of the Quality Principles
- use of logic model approach to determine resources, outcomes and impacts based on identified local challenges
- four year partnership investment plan agreed with the Arts Council by May 2018, reviewed annually, and partnership investment plan published by June 2018. First partnership agreement in place by January 2019
- minimum of two investments in the first year, minimum of four in subsequent years. Investments should be for more than one year in duration and for a minimum of £25,000 per investment (minimum 100 per cent cash match). Co-investors must be strategic partners and not delivery partners
- one cross-area/national agreement in place for April 2019, and six cross-area/national programmes developing in 2018-22 between Bridge areas to maximise shared resources and learning, resulting in improved arts and cultural provision for children and young people within a locality
- proactive sharing of learning/dissemination embedded

<p>Partnership investment agreements drawn up and programmes progressing</p>	<p>Specific requirements:</p> <ul style="list-style-type: none"> • partners agree an investment strategy via the Bridge governance group • framework contractually secures investment from partners • the Arts Council reserves the right to sign off on all partnership investment agreements as required
<p>Bridges collaborating on cross-area and national partnership investment programmes</p>	<p>Aims:</p> <ul style="list-style-type: none"> • Bridge network is working together to secure large partnership investment programmes across England between Local Cultural Education Partnerships • successful programmes will include national commissions, enterprise investment and social investment activity • sharing and dissemination of success strategies

What will success look like?

- Improved, longer term and sustainable investment in cultural education in the Local Cultural Education Partnerships
- Quantifiable improvement in levered-in investment in Local Cultural Education Partnerships as a result of Bridge partnership investment
- Increased engagement with Arts Award from schools and arts and cultural organisations, contributing to a 30 per cent annual growth in moderations



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

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