

Arts Council England and Heritage Lottery Fund Memorandum of Understanding Delivery Plan to March 2020

This Delivery Plan details actions to be taken by Arts Council England (ACE) and the Heritage Lottery Fund (HLF) to deliver our Memorandum of Understanding (MoU) which was developed in response to the *Mendoza Review: an independent review of museums in England* (2017).

The activity outlined below captures joint work, shared initiatives and the first phase of activity to support our joint delivery of Mendoza recommendations 1 and 2: that ACE take a strategic lead on developing museums in England, with HLF supporting through funding and that, together with DCMS, we align our funding and support for museums to deliver the Mendoza priorities for museums.

To inform this delivery plan we mapped how each organisation is already delivering against the Mendoza priorities for museums (feeding in to the DCMS Mendoza Action Plan) and we explored different options for aligning funding. We agreed the approach set out below as a first phase in delivering the MoU, with a focus on sharing intelligence and data, informing funding decisions, developing a shared strategic approach and a joint initiative to deliver dynamic collections management. While our focus is on delivering the Mendoza recommendations, in terms of sharing intelligence and developing a shared strategic approach, our new approach may naturally extend beyond museums to encompass other shared interests, including arts organisations operating in heritage buildings and major cultural events.

In January 2020 we will assess delivery against the Mendoza recommendations and the MoU and develop a second delivery plan for the remainder of the four-year MoU period.

A. Developing a shared strategic approach to supporting museums in England

We will work together at strategic, operational and area levels to better understand how each organisation supports museums and to develop a more joined up strategic approach. Wherever possible we will align or differentiate our support for museums.

Actions:	Date:
1. HLF will brief ACE on its new Strategic Funding Framework and what it means for museums in England at draft stage to allow any ACE input to be considered by HLF Executive and Board before plans are finalised.	September 2018
2. ACE will brief HLF on the development of the new 2020-2030 Strategic Plan at key milestones.	September 2018
3. Arts Council Chief Executive presents to HLF Board on Arts Council strategy and support for museums.	March 2019
4. HLF Chief Executive presents to Arts Council National Council on HLF strategy and support for museums	January 2019
5. HLF Head of Strategy, Head of Operations & Head of Museums presents to Arts Council Area Leaders Group on HLF strategy and support for museums	February 2019
6. ACE Director, Museums & Area Director, North, present to HLF Operations and Strategy & Business Development on ACE strategy and support for museums	February 2019
7. HLF Head of Museums and policy officer meet ACE Museums Team to discuss strategy, funding and work with museums (in addition to quarterly meetings of MoU Project Group and monthly meetings of museum leads).	Annually
8. Meetings for ACE and HLF Chief Executives with museums leads to discuss and agree a more strategic approach to supporting museums in England and other matters of shared concern (for example support for major cultural events, museums at risk etc)	Every 6 months

B. Aligning our support for museums

Both organisations will seek to make it easier for museums to work with our two organisations, providing greater clarity on the support we each offer and, wherever possible, aligning and streamlining our funding processes.

Actions:	Date:
9. Work to align and, where possible, streamline HLF and ACE museum application, assessment and monitoring processes. Representatives from HLF and ACE’s museums and funding teams will meet to develop proposals.	September 2018
10. Proposals for aligning and streamlining our museum funding applications, assessment and monitoring processes agreed by HLF and ACE executives (to be introduced alongside new strategies for each organisation).	January 2019
11. Both organisations to improve communications to museums (both separately and jointly) to clarify the support that we offer. This will include a joint statement, improved ACE web pages and communications around HLF’s new strategic framework.	January 2019

C. Sharing intelligence and data

ACE and HLF will share intelligence, enabling better informed decision-making for National Lottery projects. Appropriate interventions and alignment across each other's processes will be ensured, achieving efficient use of National Lottery funding through early conversations and interventions, alongside intelligence into decision making.

A wider benefit of this aligned approach and region/area discussions is that it facilitates sharing of information at an area level on other areas of shared funding beyond museums, for example theatres and other historic arts buildings.

We recognise that reliable accurate data acts as the basis for much of the join analysis and advocacy work that we will undertake. ACE and HLF have different grant management systems so read-across is not simple. In the first instance we will share data through the use of Accreditation number. Providing a simple link across ACE and HLF's two sets of data simplifies joint reporting and analysis.

Actions:	Date:
12. Each organisation to start to use Accreditation number as unique identifying number for museum data	April 2019
13. Organisations to work together to map their funding to Accredited museums in England	April 2019
14. HLF's Head of Regions and ACE's Area Directors will meet to share intelligence, discuss shared and individual priorities for investment, to support the development of the shared understanding and approach to priority places, to consider advocacy and relations with Local Authorities and discuss approach to individual museums as necessary (funding applications, museums at risk). Discussions should ensure: i. General intelligence gathering and sharing across the organisations to ensure adequate levels of knowledge of sector and regional context (to include ACE colleagues briefing HLF colleagues on Area Plans and priorities); ii. That museum policy issues and regional/national context from the strategic lead, Arts Council England, is fed into HLF assessment and decision making;	Quarterly

<ul style="list-style-type: none"> iii. ACE and HLF have overview of live and upcoming pipeline funding applications for mutual intelligence; iv. Collections and museums at risk in adherence with shared protocol; v. Information sharing and, where possible, joint approach to major events e.g. City of Culture, Commonwealth Games 	
<p>15. Communicate clearly to the sector and applicants that HLF and ACE will share application data and information between the two organisations</p>	<p>November 2018</p>
<p>16. Develop mechanisms for improved understanding of total National Lottery funding to any one project and analyse data</p>	<p>January 2019</p>
<p>17. ACE and HLF to explore the commitment to make funding data more transparent and easier to analyse including the potential of using the Esmee Fairbairn 360 degree platform</p>	<p>End 2019/20</p>

D. Informing funding decisions

HLF will seek local and national intelligence from ACE at development, assessment and decision-making stages, based around the set of mutually agreed criteria. ACE will provide an overview including ACE's own priorities of HLF's Board and Committee museum cases within a regional and national context. ACE will also provide a view on HLF projects involving development of new museums, in line with the Mendoza recommendation. HLF will provide a view on their previous funding context for ACE to take into account for museums applications to their National Lottery project grants; to avoid duplication and also to provide the wider context of National Lottery funded projects.

Actions:	Date:
18. Protocol and schedule for ACE to input into HLF funding decisions agreed by HLF and ACE executives. A draft protocol has been developed and will be tested over the summer by HLF staff to ensure it works effectively across all of HLF's English regions for the next Committee and Board cycles.	September 2018
19. Develop a process for HLF to provide intelligence and National Lottery funding history for museum applications to National Lottery project grants over £15,000	November 2018

E. Joint initiative to support dynamic collections management

Our mapping of delivery against Mendoza priorities for museums concluded that Dynamic Collections Management was an area which would benefit from more attention and a joint approach. We will work together to understand how, together and separately, we can work together (and with other funders) to deliver this priority for museums. This initiative will provide clarity to museums on what dynamic collections management is and align with other sector collections initiatives including Museum Association's Collections 2030. This initiative will relate to ACE's work with Subject Specialist Networks, Collections Designated as Outstanding and workforce development and HLF's track record in strategic collections management and development.

Actions:	Date:
20. Research work and development of project plan for joint initiative on dynamic collections management, for delivery in 2020/21.	March 2019
21. Delivery plan agreed for delivery of joint initiative on dynamic collections management.	June 2019

F. Evaluation, Accountability and Next Steps

This delivery plan sets out actions for the first year to the end of 2019/20. This first year is an opportunity for ACE and HLF to establish a closer working relationship and identify further opportunities to deliver the Mendoza recommendations.

Actions:	Date:
22. Develop metrics which will allow us to assess how successful we have been at delivering Mendoza recommendations 1 & 2.	September 2018
23. A light touch evaluation of delivery against Mendoza recommendations 1 & 2 with recommendations for next steps.	Winter 2019
24. Establish internal reporting mechanisms to ACE Executive and HLF Trustees Board for annual reporting against delivery.	November 2019
25. Develop phase 2 delivery plan.	January 2020
26. Reporting to Minister for Culture on progress against delivery plan.	Quarterly

G. Other shared projects and priorities

The table below outlines the areas of work where HLF and ACE will be working in partnership over the course of the Delivery Plan. It includes formal partnerships and more informal collaborations.

Area of work (Use terms from MoU shared strategic interest list)	Project/Initiative	Deliverables for 18/19	HLF lead	ACE lead	Lead Organisation	HLF budget	ACE budget
Cultural Festivals	14-18 NOW	Joint Evaluation	Karen Brookfield	Simon Mellor			
Cultural Festivals	Coventry City of Culture 2021	TBC	Karen Brookfield	Peter Knott			£5m
Capital/Infrastructure	Information sharing and understanding joint funding issues.	ACE and HLF staff to agree ways of working by end September	Fiona Talbott	Kate Bellamy	N/A	NA-staff time	NA-staff time
Digital	Digital Maturity Index and Code - working together, and with other partners, to implement recommendations of DCMS Culture Is Digital report.	Index and Code created, piloted and made available to sector by March 2019.	Karen Brookfield	Owen Hopkin/ Nicola Saunders	Joint HLF/ACE	Budget and staff time	Budget and staff time

Diversity and Inclusion	Sharing strategic thinking on diversity initiatives.	HLF inclusion strategy aligned with Creative Case for Diversity and informed by ACE experience.	Jo Reilly	Abid Hussain	Joint HLF/ACE	N/A -staff time	N/A -staff time
Diversity and inclusion	Working together to align data collection and related language to support implementation of Tailored Review, Mendoza and Culture is Digital. Working together to support sector diversity and inclusion initiatives.	- New HLF data collection strategy. - Agreement on aligning museums data collection by March 2019. - Open Up report/toolkit– part funded by ACE, and jointly steered by a group of UK organisations including ACE and HLF, aims to support museums to increase the diversity of their audiences. Published in June 2018.	Jo Reilly Fiona Talbott	Cat Hammersley Isabel Churcher	Joint HLF/ACE UK Group	N/A -staff time N/A – staff time	N/A -staff time N/A – staff time
Engagement and Audiences	Working together to align data collection	- New HLF data collection strategy.	Jo Reilly	Cat Hammersley	Joint HLF/ACE	N/A -staff time	N/A -staff time

	<p>and related language to support implementation of Tailored Review, Mendoza and Culture is Digital.</p> <p>Working together to support sector diversity and inclusion initiatives.</p>	<p>- Agreement on aligning museums data collection by March 2019.</p> <p>- Open Up report/toolkit– part funded by ACE, and jointly steered by a group of UK organisations including ACE and HLF, aims to support museums to increase the diversity of their audiences. Published in June 2018.</p>	Fiona Talbott	Isabel Churcher	UK Group	N/A – staff time	N/A – staff time
Learning	Twice-year meeting to maintain working relationship and share information.	Watching brief on mutual areas of interest in cultural learning and opportunity to explore joint working as opportunities arise; none planned for 18/19.	Jo Reilly	Anne Appelbaum	N/A	N/A – staff time	N/A – staff time

Philanthropy	Matched Crowdfunding Pilot indicated in Culture White Paper	Final report on projects from Nesta due end June 2018.	Anne Young	Clare Titley	Nesta	£126.5K and staff time	£125K and staff time
Philanthropy	Catalyst programmes – legacy, sharing strategic thinking on philanthropy and evaluations. HLF/ACE leads meet informally three times annually.	HLF - Final Capacity Building evaluation report (Catalyst Umbrella) due April 2018: ACE - Catalyst Evolve and Catalyst Small Grants (now includes museums) end Dec 2019.	Anne Young	Clare Titley	HLF and ACE run separate programmes	TBC	£20m and staff time
Place-making	DCMS Cultural Development Fund - working together to advise DCMS	Implementation of CDF to DCMS timetable	Karen Brookfield	Paul Bristow	DCMS	N/A -staff time	£1m for administration
Place-making	Great Place Scheme Programme: delivery and management	- Delivery of Year 2 of GPS in England – programme management and monitoring etc. - 4 quarterly progress meetings	Sara Crofts Sara Crofts	Paul Bristow/ Helen Parrott Paul Bristow	HLF Joint HLF/ACE	£10m programme funding N/A – staff time	£10m programme funding N/A – staff time

Place-making	Great Place Scheme Programme: evaluation and learning	<p>- Three year evaluation agreed. Year 1 interim evaluation report due end June 2018.</p> <p>- Learning and Networking Event, 28 March 2018; annual event planned.</p>	<p>Sara Crofts/ Kion Ahadi</p> <p>Sara Crofts</p>	<p>Helen Parrott</p> <p>Helen Parrott</p>	<p>ACE</p> <p>HLF</p>	<p>Evaluation contract: £50,000 over 4 years</p> <p>£3,500 plus staff time</p>	<p>Evaluation contract: £50,000 over 4 years</p> <p>N/A - staff time</p>
Resilience	Sharing strategic thinking on resilience to inform strategy, research partner in Prosper. Planning for 19/20 ACE Development Funds focused on resilience and workforce.	<p>-Prosper research and evaluation report (Creative Utd)</p> <p>-Development funds on leadership and governance to be launched Jan 2019;</p> <p>- draft plans for new Development plans by March 2019</p>	Anne Young	Jane Tarr/Ross Burnett	Joint HLF/ACE	£6K	TBC
Resilience/ Museums	'Rethinking Museums' (working title)	TBC	Fiona Talbott	Kate Bellamy		TBC	TBC

Skills	Character Matters museum workforce delivery plan 2018 - 2020 (HLF and ACE part of steering group)	2 year action plan for museums sector published May 2018; quarterly meetings of steering group to monitor progress.	Fiona Talbott	Isabel Churcher	UK Steering Group	N/A staff time	N/A staff time
Social investment	Culture Capital Fund – (called Arts Impact Fund 2 by ACE)	To be launched in the autumn	Anne Young	Ross Burnett/ Nicola Saunders	Joint HLF/ACE	£2m	£3m
Wellbeing	Sharing information and discussion on shared measures of impact.		Jo Reilly	Mags Pattern	N/A	N/A staff time	N/A staff time
Workforce	Character Matters museum workforce, including volunteers, delivery plan 2018 - 2020 (HLF and ACE part of steering group)	2 year action plan for museums sector published May 2018; quarterly meetings of steering group to monitor progress.	Fiona Talbott	Isabel Churcher	UK Group	N/A staff time	N/A staff time
Additional museum-specific shared interests							
Acquisitions	NHMF and HLF;	Ongoing – reactive to applications.	Fiona Talbott	Scott Furlong	N/A	Staff time and NHMF	Staff time and

	ACE and HLF to have round table discussion; Collections and Cultural Property share information with HLF.	Round table discussion to be held.				purchase funds	ACE/V&A purchase funds
Dynamic Collections Management	Collections 2030 - a major research project initiated by the Museums Association, and working collaboratively with a range of sector bodies, looking at the long-term purpose, use and management of museum collections.	Final report to be published by February 2019.	Fiona Talbott	Scott Furlong	UK Group	N/A -staff time	N/A -staff time
	Research into the issue of collections knowledge outside of the nationals and future role of SSNs.	Research to be commissioned and report produced by March 2019.	Fiona Talbott	Scott Furlong	ACE	N/A -staff time	£30k and staff time
Museums/ Collections at risk	Development of a clear protocol for identifying and responding to	Protocol agreed by cross sector stakeholders and	Fiona Talbott	Isabel Wilson	Joint HLF/ACE with	N/A – staff time	N/A – staff time

	museums and collections at risk, in partnership with cross sector stakeholders.	working between all partners; to be published by August 2018.			stakeholders		
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