Museum Development Providers’ Prompts
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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 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.
Museum Development Providers

Goal 1
monitoring prompts

Excellence is thriving and celebrated in the arts, museums and libraries

Our strategy, *Great Art and Culture for Everyone*, shows our determination to support the arts and cultural sector to achieve excellence in all it does. By this we mean the creation of work of artistic and cultural excellence and the way this work engages with audiences. We want museums to show excellence in the way that they use their collections to enrich people’s lives. We want to support libraries to develop a range of excellent services to help people to deepen their knowledge, widen their appreciation of culture and gain the skills and information they need.

a). Is the organisation on track to deliver successfully against the SMART objectives in its business plan and funding agreement?

b). Is the organisation effectively supporting museums to achieve excellence in developing, researching, caring for, interpreting and sharing their collections? Evidence should include a strategy and costed plans to enable museums to:
   - review their collections development policy, particularly to ensure there are opportunities for the collections to reflect contemporary England, as locally appropriate
   - develop an appropriate documentation plan, and a way of sharing information appropriately whether onsite, offsite or online.
   - to improve or refresh their interpretation onsite, offsite or online

c). Is the organisation effectively supporting museums to challenge traditional ways of thinking and develop new and innovative ways of working with collections, interpretation and programming? Evidence should include a strategy and costed plans to enable museums to show how museums will be supported to develop new and innovative ways of:
   - working with their collections and how this will be evaluated
   - developing interpretation onsite, offsite or online and how this will be evaluated
   - developing programming onsite, offsite or online and how this will be evaluated

d). Is the organisation supporting other museums to contribute effectively to the Creative Case for Diversity?

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SMART objectives are: specific, measurable, actionable, realistic, and time-based
Goal 2
monitoring prompts

Everyone has the opportunity to experience and to be inspired by the arts, museums and libraries.

Our strategy, Great Art and Culture for Everyone, talks about how arts and culture enrich our lives. They fire our imagination, challenge, inspire, educate and entertain us. Everyone should be able to visit or experience a high quality museum, library or live performance or participate in cultural activity, including through digital media. These experiences open us to reflection, encourage debate and critical thinking, and deepen our understanding of the world. We believe that increasing the number of people who experience and contribute to the arts, to museums and to libraries is good for society.

a). Is the organisation on track to deliver successfully against the SMART objectives agreed in its business plan and funding agreement?

b). Does the organisation understand current audiences and is it effectively supporting museums to develop their audiences and communities, including those people least engaged with museums?

c). Does the organisation understand the needs of museums regarding the quality of the visitor experience and visitor satisfaction? Is it effectively supporting museums to improve and develop in these areas?

d). Is the organisation effectively supporting museums to widen engagement with their collections, for example through the use of touring exhibitions or digital technologies?

e). Is the organisation developing audiences for the museums sector as a whole and is it developing shared approaches to the capture, sharing and reporting of audience data?
Goal 3
monitoring prompts

The arts, museums and libraries are resilient and environmentally sustainable

We expect our National Portfolio Organisations to demonstrate their resilience. 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 delivering quality work in line with their mission. Within the 2018/19 – 2021/22 National Portfolio, we want to see ‘model’ providers of culture that are financially and environmentally sustainable. This includes thinking about and planning for your own organisational performance and financial and environmental sustainability. We believe long-term thinking and planning, supported by strong leadership and good governance, are important in increasing resilience. For many organisations, the results of this thinking are outlined and embedded within a business plan. We believe that resilient organisations regularly review and reflect on their thinking and their plans.

a). Is the organisation on track to deliver successfully against the SMART objectives agreed in its business plan and funding agreement?

b). Is the organisation or partnership strengthening its own organisational resilience and income generation?

c). Is the organisation approaching delivery of Accreditation: technical advice and support to enable museums to achieve and sustain Accreditation and associated standards? Is the organisation working effectively in partnership with other bodies to provide support for museums to achieve the Accreditation standard?

d). Is the organisation maintaining a watching brief on Accredited museums undergoing circumstances of significant change, including museums at risk of closure?

e). Is the organisation effectively co-ordinating the Museum Mentors scheme?

http://www.artsCouncil.org.uk/NPO/docs
f). Is the organisation effectively **supporting museums to meet future challenges**, including the changing financial landscape, in a strategic and thoughtful way?

g). Is the organisation **effectively supporting museums to drive improvements in performance and governance**?

h). Is the organisation’s museum development programme **embracing environmental sustainability** and is it working with museums in its proposed area to reduce their carbon footprint and environmental impact?
Goal 4 monitoring prompts

The leadership and workforce in the arts, museums and libraries are diverse and appropriately skilled

Our strategy, Great Art and Culture for Everyone, puts people at the heart of the arts and cultural sector – the artists and curators, librarians and technicians, producers and administrators, educators and archivists and board members. It is one of our priorities to support these people to maintain and develop the skills they will need to achieve our shared mission. Importantly, this is about recognising and respecting the hard-earned specialist skills that are essential to so much of what the cultural sector does.

Through goal 4 we want to see an appropriately skilled workforce and leadership that is truly diverse and reflects contemporary England. This is separate from developing specialist artistic or museums practice. Your organisation will need to collect and report on information about the diversity of your workforce and leadership. Organisations in each of the bands will also demonstrate leadership within their artform or discipline and geographic area. This will take many and different forms, including facilitating and creating networks across the arts and cultural landscape. We expect all organisations to adopt good practice in developing and managing their workforce, for example undertaking regular performance reviews of senior staff members, developing succession plans (for boards and staff) and having transparent recruitment processes.

a). Is the organisation on track to deliver successfully against the SMART objectives agreed in its business plan and funding agreement?

b). Is the organisation effectively assessing the workforce needs within museums and is it effectively meeting these needs? Is the organisation contributing to developing skills across the sector, ensuring these are right for the future?

c). Is the organisation effectively enabling museums to support high quality volunteering, apprenticeships, paid internships and work placement opportunities?

d). Is the organisation effectively supporting museums to make progress towards ensuring that the leadership and workforce reflect the diversity of their locality?
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 on track to deliver successfully against the SMART objectives agreed in its business plan and funding agreement?

b). Is the organisation effectively supporting museums to enable their offer for, with and by children and young people to be of high quality?

c). Is the organisation’s programme effectively supporting museums to be inclusive and accessible for all children and young people?

d). Is the organisation effectively supporting museums to engage with Arts Award, and promote and support Artsmark for schools?

e). Is the organisation effectively working with partners and stakeholders, as well as linking to national initiatives, to enable museums to improve the delivery of cultural opportunities for children and young people? For example, is it linking to Bridge Organisations and national initiatives such as Kids in Museums?
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 11-12.

- poor financial and other information submitted both to the board\(^3\) and the Arts Council (including weak agendas)
- adverse financial trends, eg declining sales or reserves
- poor business plans and planning
- lack of forward planning, future focus and external environmental factors
- poor risk management, eg 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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\(^3\) Throughout this guidance, by ‘board’ we mean a board of directors or trustees, or any equivalent management committee or group
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). Are 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 not limited to reducing impacts, operations, strategy, stakeholders, 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 are 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? 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?

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4 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.
QUESTIONS?
GET IN TOUCH — WE’RE HAPPY TO HELP

Reach our Customer Services team here:

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