

SHARE Museums East museum development programme 2015/16:

Effective Forward Planning seminars and development grants scheme

This guidance document explains the purpose and process of the SHARE Museums East Effective Forward Planning seminars and development grants scheme 2015-16. Please see below for further information, grant guidance and eligibility.

After reading this document, we recommend you contact your Museum Development Officer (MDO) to discuss your proposal before submitting your application to the grants scheme.

Introduction

Forward planning is a central development tool enabling museums to plan effectively for long-term success and become more resilient. It represents a vital component of the Museum Accreditation Standard.

As part of our 2015-18 regional museum development activity plan, funded by Arts Council England, SHARE Museums East is supporting museums to access support in writing, developing and reviewing their forward plans.

This support comes in two forms

- **Seminars**
- **Small grants**

Forward planning seminars

The project will take place between October 2015 and March 2016 and will begin with an introductory one day seminar. We are planning two dates in the region.

- 10 am to 4 pm Wednesday 28th October at Saffron Walden Museum, Essex
- 10 am to 4 pm Thursday 5th November at Stevenage Museum, Hertfordshire

Attendance at either of the seminars will support any museum considering their forward plan. They will also greatly help to focus and strengthen a grant application under the Effective Forward Planning programme.

The free seminars are open to Accredited museums and those who are actively 'Working Towards Accreditation' across the region. The two locations have been chosen to best reflect those areas in which museums have been or will shortly be invited to submit an Accreditation return in the coming months.

The one day seminar will be delivered by Sam Hunt, Forward Planning Consultant, the local Museum Development Officer and a member of the SHARE Museums East team.

The seminar will be the same in both locations and will cover the following:

- Introduction to the Forward Planning process – involving your staff, volunteers and stakeholders
- Accreditation requirements
- Developing a master plan and an action plan
- Case studies of successful processes in other museums
- Available resources, templates, case studies and other sources of help
- Practical first steps
- The SHARE development grant scheme and details on how to apply
- Group discussion and opportunities for individual surgeries / consultations

A successful forward plan involves as many people invested in the museum's future as possible. We **strongly recommend** that at least two people from your museum attend the seminar. To support this more effectively we ask that one should be a member of the governing body or museum committee and one a key staff member or volunteer engaged in day to day decision making.

To book on the seminars please visit the SHARE Museums East website at:

28th October: <http://sharemuseumseast.org.uk/events/effective-forward-planning-seminar-oct/>

5th November: <http://sharemuseumseast.org.uk/events/effective-forward-planning-seminar-nov/>

Forward planning development grants

SHARE Museums East is launching a forward planning development grants scheme for 2015/16.

Museums can apply for a forward planning development grant up to a maximum of £1000 on submission of a completed grant application form to sharemuseumseast@norfolk.gov.uk. The grant form is available from the SHARE Museums East website at:

<http://sharemuseumseast.org.uk/forward-planning-grants/>

It is important to understand that the grant is not intended to support the implementation of any aspect of an agreed or completed forward plan, but rather to support the forward planning process.

Examples of things for which the grant can be used include:

- 1-2-1 support such as working with a forward planning consultant for tailored support in writing, developing or reviewing your plan.
- Support for wider consultation for example costs towards staging events or focus groups with volunteers, staff, stakeholders, users and non users.
- Collection and evaluation of audience data to inform forward planning.

If you are unsure if what you are applying for is eligible for a grant please speak to your MDO or a member of the SHARE Museums East team. We are happy to talk it through with you.

Grants eligibility and criteria

Museums from across the region are invited to apply but priority will be given to museums that:

- Show clearly how they intend to use the grant to support their forward planning process.
- Are an Accredited museum at date of grant deadline **and** are in the forthcoming Accreditation tranches:
 - Tranche 3 (invited 01/08/2015 with deadline of 14/02/2016)
 - Tranche 5 (invited 01/12/2015 with deadline of 14/06/2016)
 - Tranche 7 (invited 15/04/2016 with deadline of 14/09/2016)
- Are registered as an Accredited museum or Working Towards Accreditation at date of grant deadline.
- Have support of the county MDO (and Museum Mentor if applicable).
- Are able to demonstrate the support and engagement of their governing body or managing committee in the forward planning process.
- Are able to demonstrate evidence of need eg Accreditation award outcome letter with outstanding required actions or areas of improvement for 1.4 Forward planning.
- Are prepared to share learning for example through county museum networks or SHARE website case studies.
- Are willing to feed back comments into the evaluation of the programme.

Please note: Museums that meet the grant criteria but do not attend an introductory forward planning seminar will still be eligible for the grant with the full support of their county Museum Development Officer.

Exclusions

Applications will not be considered:

- To cover the costs of activities taking place before a Development Grant offer is made.
- By museums that are not actively working towards Accreditation.
- From Major Partner Museums.

How to apply

It is important to follow these instructions carefully, to ensure the success of your application and claim. Failure to comply with the scheme guidelines may result in an offer being withdrawn.

- Discuss your application in advance with your county Museum Development Officer.
- Application forms are available to download from www.sharemuseumseast.org.uk or contact us by email at sharemuseumseast@norfolk.gov.uk.
- Only fully completed application forms will be considered.
- The application and supporting documents may be submitted by email or as hard copies.

- Applications must be supported and signed by a second person at senior level, eg Chair, Director or Manager (an electronic signature such as an identifiable email from the appropriate individual can be provided).

You must enclose full details of the proposed development activity to be funded and a detailed breakdown of costs. Supporting evidence is required e.g. programme for the training course, event or activity; for a custom-designed activity, the brief provided to the consultant or trainer; evidence of all expected costs e.g. quotations, estimates, price lists. Hard copies or electronic versions are acceptable.

What happens after you apply

- Applications will be acknowledged by email only.
- Applications will be evaluated by the SHARE Museums East team. When reading applications, the reviewers ask themselves whether:
 - the museum can demonstrate their ability to commit for the duration of the programme?
 - what impact will the development grant have on the applicant museum?
 - how will the museum measure the success of its project?
- A decision will be provided by Friday 4th December 2015.
- Successful applicants will receive an offer letter by email. This will confirm the amount of the grant and any special conditions applied, in addition to the general expectations set out in this document.

Grant offer and payment

- The offer letter will be accompanied by an acceptance form. This will clarify the responsibilities of the applicant organisation, SHARE Museums East and other stakeholders such as the MDO.
- To accept the development grant on the terms offered, the acceptance form must be completed, signed and returned by the deadline stated in the letter, or the offer may be withdrawn.
- The grant payment will be made on behalf of SHARE Museums East through Norfolk County Council.
- Development grants may not be used for any other purpose than that stated in the application form and offer letter.
- Successful applicants will be asked to provide feedback on the process as part of the project evaluation so the benefit of the development grants programme can be measured.
- You may be offered optional opportunities to develop your forward planning during the award period for example peer-to-peer support.
- You will be asked to share your learning with other museums by producing a case study or giving a presentation.
- Publicity about the development grant award must acknowledge that it has been funded by a grant from the SHARE Museums East Museum Development Programme, supported using public funding by Arts Council England. Logos are available on request by email to sharemuseumseast@norfolk.gov.uk.

How to claim your development grant

It is your responsibility to claim your development grant by submitting your invoice to us.

- In order to transfer the grant amount to your organisation's bank account, a 'New Suppliers Form' may need to be completed and returned.
- Once details have been received, a Purchase Order (PO) number will be sent to your museum. You should keep a record of the PO number as you will need this to claim your grant.
- Your invoice claim cannot exceed the amount offered in your letter.
- After the development activity has taken place, recipients should submit:
 - A completed feedback form.
 - A copy of the paid invoice(s) from the consultant etc.
 - Relevant receipts for other expenses shown on the original application form.
- The claim documentation may be submitted by email, but must include a signed copy of the claim form (scanned if necessary).
- All claims must be received, correctly submitted, by 24th March 2016. Claims received after this deadline will not be paid.

Key dates

Launch of programme and applications opened	Thursday 1st October 2015
Deadline for grant submission	5pm Friday 20th November 2015
Successful applicants will be informed and grant offers made by	Friday 4th December 2015
All money must be spent by and proof of expenditure provided by	Thursday 24th March 2016
Grant recipients will also be required to submit a report on the impact of their grant activity by	Thursday 30th June 2016

Contact for the Effective Forward Planning programme

For more information and to discuss your possible involvement with the Effective Forward Planning programme please contact Simon Floyd, SHARE Co-ordinator.

Tel: 01603 638141 Email: simon.floyd@norfolk.gov.uk

Where can I get help?

Visit our website at www.sharemuseumseast.org.uk/local-links/ for contact details of your local MDO.