



## Business Plan

# South West Museum Development

2022 – 2023

Final Approved



Supported using public funding by  
**ARTS COUNCIL  
ENGLAND**



**culture  
team**

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## Introduction

This business plan sets out our ambitions, priorities and programme of work, including, but not limited to, our Arts Council England (ACE) funded Museum Development activity for 2022-23. We will continue to focus on delivering impactful development services to the sector, paying close attention to how the pandemic has impacted both the sector and the communities they serve.

2022-23 will continue to be a period of transition and change for all of us and this will influence our priorities and the manner in which we deliver development support. It is important to recognise that the ongoing impact of the pandemic will affect our own team, the museum sector and the audiences and communities they serve. The ongoing funding uncertainty due to post-Covid commercial recovery, alongside the extension of targeted government interventions such as the Job Retention Scheme, will place additional pressures as organisations strive to adapt. Capacity continues to be an issue, both for the sector and for the volunteer workforce. The environment in which we all operate continues to be complex and will affect the sector in different ways over the coming year. This will require clarity in our vision, agility in our approach, and investment to ensure that we are maintaining our impact.

Museum Development exists to support museums and heritage organisations to develop and improve across all areas of their operation. At South West Museum Development we provide trusted, local and relevant development services to support museum and heritage organisations to improve, innovate, collaborate and celebrate. We understand the specific context and priorities of museums at both a regional and local level. We work with partners to maximise our impact and to advocate the value of museums and heritage widely on their behalf.

Throughout the pandemic, South West Museum Development established itself as a first port of call for many museums. Our national connections and sector knowledge enable us to interpret and broker national opportunities ensuring they are relevant to local museums, to provide practical assistance and, as a result of this development support, increase access to funding, resources, skills and expertise for museums across the region.

This business plan is foremost a document for South West Museum Development, to guide our activity and assist us with prioritisation and the best use of, predominantly, public resources. Alongside annual Museum Development funding of £540,000 secured each year from Arts Council England, we aim to raise further funding from additional sources to maximise investment in the sector. This plan is also used, alongside our activity plan, to report to Arts Council England and other funders. Our business and activity plans are reviewed every three months to enable us to map progress, respond to challenges, adapt, evaluate and maximise opportunities that can further our Vision and Mission working with museums and partners for greater impact

## Context

The national Museum Development programme was established in 2006. The National Development Agency for museums, Arts Council England, directs Museum Development funding in England through a network of nine regional providers. This funding is focused on building the resilience and ambition of non-national museums across England and those not already in receipt of funding as one of the Arts Council's National Portfolio Organisations. Further information on the Arts Council England's targets for Museum Development are presented on page 11.



**Arts Council will maintain investment of £23.8 million in 2022-2023 to National Portfolio Organisations (NPO) in the South West; £4.8 million is invested in the South West museum sector; South West Museum Development receives funding of £540,000 each year**



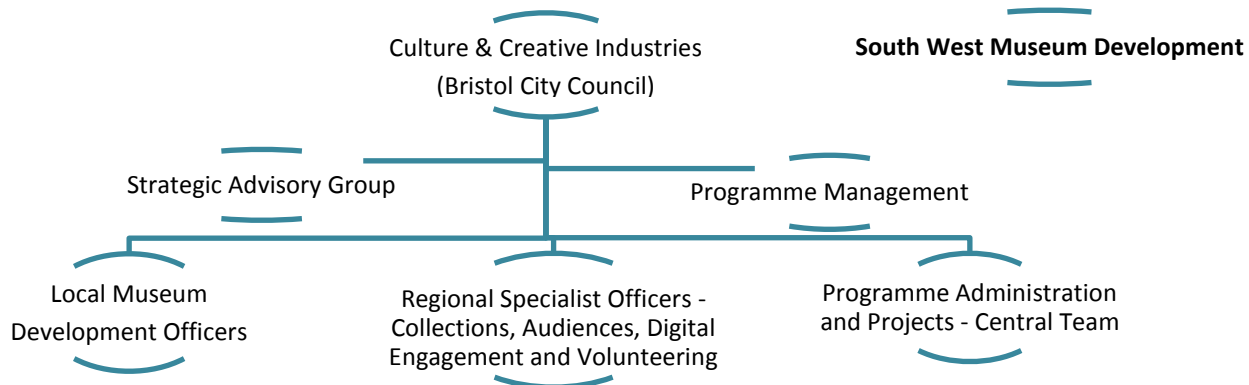
**Across the three years 2018-2021 we have generated an additional £924,000 - Equivalent to 90p for every £1.50 (2:3) of Museum Development funding awarded by Arts Council England**



**Our additional funding has been generated from local authorities, grant-giving bodies including National Lottery Heritage Fund, Art Fund and Historic England, and income from commercial contract activity which we reinvest in development support for South West museums**

South West Museum Development is hosted by the Cultural and Creative Industries (C&CI) department of Bristol City Council. The Bristol City Council-employed team members of South West Museum Development are located across the South West from Plymouth to Gloucester. Our Conservation Development Officer is hosted by Royal Albert Memorial Museum through Exeter City Council, and a further six Museum Development Officers (MDOs) are hosted by local authorities (LAs) or partner organisations across the region<sup>1</sup>. Together we form the workforce of South West Museum Development, delivering sector support and development services to museums across the region.

Strategic expertise and direction for the programme is provided through a [Strategic Advisory Group](#). Led by our Chair, Stephen Boyce, membership of the group reflects expertise and experience in key areas of priority such as fundraising, natural environment and academic research.



<sup>1</sup> SW MD funding is allocated to MDO posts employed by Wiltshire Council, Dorset Council, South West Heritage Trust, Exeter City Council, North Devon Council and Cornwall Museum Partnership.

## Vision, Mission, Values

### **Our Vision**

Working together for diverse, inclusive and inspiring museums relevant to the lives of the diverse communities they serve

### **Our Mission**

We are museum and heritage development specialists working with the museum and heritage sector in the South West of England to effect positive, lasting change and deliver public value  
Together we create opportunities which build confidence and skills, encourage innovation, and celebrate our heritage and culture.

### **Our Values**

**Relevant** - operating a flexible, responsive and forward-thinking development service

**Evolving** - building on our, and others' experience to effect positive and lasting change

**Collaborative** - creating and engaging in partnerships to maximise impact

**Inclusive** - putting an inclusive culture at the heart of our work and engaging with empathy

**Trusted** - operating with fairness, transparency and openness

**Environmentally aware** - conscious of our impact and prioritising a reduction in our environmental impact

### **Our principles and the benchmarks by which we measure our performance**

As we deliver our programme of work and make decisions we will be guided by the values which underpin our Vision and Mission. During 2021-22 we have worked as an organisation to hone our approach to evaluation and to understand in more depth the positive and lasting change we are seeking to make with museums and the diverse communities they serve. We have mapped our work using a Theory of Change methodology which sets the impact of our work in the context of the place and people of the South West region. During 2022-23 we will continue to develop our approach and systems to communicate and measure the impact of our work.

We will be guided in our actions and priorities for our work by applying the following principles:

#### **External considerations:**

*To be trusted advisors to museums and heritage*

*To create resources and tools which evolve out of our shared learning and development activity*

*To provide a credible source of sector intelligence*

*To embed the urgency of action required on inequality and support others to do the same*

*To be an effective advocate for the role museums play in contributing to a better and fairer society*

*To ensure that museums acknowledge and address the climate emergency in planning their work*

#### **Internal considerations:**

*To have the capacity to share and celebrate our practice and success alongside the museums we work with*

*To communicate and measure the impact of our work*

*To generate space in which to develop creative and innovative solutions to challenges*

*To ensure that our work is understood, valued and acknowledged*

## Our Strategic Aims



**To be connected and networked; we coordinate and collaborate for greater impact and positive change**



**To build capacity through effective skills development, enabling us to increase the confidence, capability and wellbeing of the museum workforce**



**To use credible sector intelligence and insights in order to communicate and amplify recognition of the value of heritage and collections to society**



**To acknowledge the climate emergency and take an active role in the green recovery**



**To prioritise opportunities that increase inclusion and tackle inequality**



## To be connected and networked; we coordinate and collaborate for greater impact and positive change

### Why is this our priority?

Together we are stronger, more sustainable, more effective and create greater impact. Museum Development regionally and across England plays an important part in connecting sector support to achieve greater impact at a local level. We work nationally as part of the Museum Development England network and alongside fellow sector support organisations. Our role in brokering with these, and other, organisations is to inform the content of programmes and ensure that they address the priority needs and reflect the operating context of the museum sector in the South West.

### What will we do and what measures will show that we have made a positive difference?

We will:

- work in partnership with national, regional and local providers to co-develop, promote, broker and deliver relevant high quality development opportunities for museums (A)
- invest in and deliver through area networks to encourage sustainable local access to information and expertise (B)
- to raise standards through effective delivery of Technical Accreditation Advice<sup>2</sup> service in the region (C)
- identify and understand the priority needs of museums to inform effective development services (D)
- identify, develop and secure inward investment for collaborative projects that enable heritage to be better understood, cared for and shared, thus making a positive impact on skills and resilience (E)
- Provide high quality communications through a process of sourcing, selection and consolidating relevant specialist sector information and guidance, targeted at South West heritage and museum audiences (F)

### How and who?

- A. Our specialist officers will work with national and regional **sector support organisations and partners** to share their understanding, knowledge and practice of regional needs and context, adding value to these opportunities for museums and heritage organisations in the South West of England
- B. We will invest in the local **Museum Development Officer network** to enable a trusted, independent source of credible information, inward investment, guidance and access to further sources of expertise across the region
- C. Provide timely and high quality **Technical Accreditation** Advisory service and raising sector standards
- D. **We will collaborate with Museum Development England** to enable effective development, commissioning and delivery of services alongside networking and prioritisation to provide greater impact of Museum Development for all museums across England<sup>3</sup>.
- E. We will coordinate, design and **secure funding for projects**<sup>4</sup> which enable practice-based opportunities and deeper investment for participant museums and the wider sector to address priority development needs
- F. Working in collaboration with our specialist development officers and local Museum Development Officers, our Programme Coordinator will lead and **deliver high quality communications** targeted at our sector audience through the production of online content developed by our team.
- G. **In collaboration with national, regional and area partners we will ensure we are able to respond to the proposed new arrangements for Museum Development post 2023 securing investment for future delivery of effective museum development services across the greater South West including Hampshire Solent and Isle of Wight.**

<sup>2</sup> We will respond to the ACE's SMART objectives for the delivery of Technical Accreditation Advice service.

<sup>3</sup> We will adopt the MDN Organisational Health Check national programme to support prioritisation and the measures will respond to ACE's SMART objectives, reaching a minimum of 12 museums each year.

<sup>4</sup> Our income target for project funding is an average of £50,000 each year.



## To build capacity through effective skills development, enabling us to increase the confidence, capability and wellbeing of the museum workforce

### Why is this our priority?

Capacity building through skills development is critical to an effective and healthy sector that is able to realise its potential. The fast pace of change in our world requires an ever-expanding range of skills and knowledge. Our position as a regional sector support organisation allows us to maximise skills, fuel networking and facilitate access to expertise for the sector through local, regional and national collaborations. Between May 2020 and March 2021 our Museums Skills programme engaged 900 paid staff and volunteer delegates.

The South West museum sector's workforce is mainly comprised of volunteers, with a ratio of eight volunteers to every one paid member of staff ([Annual Museum Survey 2020](#)). Supporting skills and confidence in the volunteer workforce is critical to volunteer retention, diversity and the quality of volunteering. It is also a primary driver for young people whether they are seeking to work in, or beyond, the museum and heritage sector. We will continue to be mindful of all forms of accessibility, responding to physical, digital and neurodivergent requirements to ensure that our services adapt to the needs of the sector's workforce.

### What will we do and what measures will show that we have made a positive difference?

We will:

- deliver a diverse and engaging programme of training in terms of topics and delivery methods, reaching over 500 delegates, representing a minimum of 70 museum organisations, in each year. We will measure the impact of our training and skills with the target of 70%<sup>5</sup> of delegates having developed new or improved skills and 60% going on to have applied this practice within their museum (A, C)
- in response to the impact of the pandemic we will work with 15 museum organisations, strengthening their infrastructure to support a sustainable volunteer workforce and rewarding experiences for volunteers (B)
- facilitate a range of forums which bring together communities of practice in line with our priority themes of Volunteering, Digital Engagement, Conservation and Audience Development (A, C)
- evaluate the impact of our networks to understand how staff and volunteers feel connected, supported and informed; building confidence, capacity and wellbeing (C)
- develop and implement an accessibility code to ensure that our skills and training services address access needs (C)

### How and who?

- A. Our specialist officers will continue to develop and deliver high quality training and specialist forums through the **SW Museum Skills programme** alongside regionally coordinated administration of the scheme and a dedicated budget for commissioning quality training providers
- B. Our specialist officer for **sustainable volunteering** will provide expertise and identify opportunities for increased investment to support rewarding volunteering experiences, sustainable capacity and measurable progress in the increased diversity of volunteers in the sector
- C. Our programme officer, working with our programme coordinator, will **administer, evaluate and adapt** our skills, forums and networks to meet the priority training needs and accessibility requirements of the sector's workforce

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<sup>5</sup> Skills targets are linked to ACE's SMART objectives for Museum Development.





## To use credible sector intelligence and insights in order to communicate and amplify recognition of the value of heritage and collections to society

### Why is this our priority?

Museum Development has a critical role to play in articulating how museums in the region, and across England, contribute to a sustainable society - economically, environmentally and socially. We will coordinate credible and representative sector data insights. Applying these insights, along with our deep understanding of the sector, we will effectively influence policy and sustainable investment in the sector for the benefit of the communities they serve. Together we will advocate for the importance of our heritage and collections to celebrate our region's precious natural environment, intangible heritage, sense of place and belonging that enriches all of our lives.

### What will we do and what measures will show that we have made a positive difference?

We will:

- deliver conservation and collections care development services to enable museums and heritage organisations to better care for and celebrate the value of their collections and to engage and inspire communities (A)
- provide a programme, South West Visitor Insights, that is fit for purpose and adaptable for museums seeking to develop effective visitor evaluation, audience development and community consultation (B, C, E)
- provide digital engagement development services to support digital infrastructure and progressive methodologies which reach and engage online audiences effectively, thereby raising awareness of, and appreciation for, heritage collections (D)
- lead and operate the national Annual Museum Survey programme, generating a primary source of representative non-national sector data on museums in England, and supporting organisations to apply these insights and improve benchmarking and sector advocacy (E)

### How and who?

- A. Our Conservation Development Officer will provide **conservation and collection care expertise** to 100 museum organisations through training, networks and projects, creating increased capacity in the sector to better care for, and enhanced collections
- B. Through engagement with the **South West Visitor Insights** programme participants we will be able to evidence the change in, and diversification of, their audiences, and embed this good practice. This process will directly support the resilience of organisations whilst making a sustainable impact on increasing inclusion and relevance
- C. Bringing together **data insights** (sector and locality specific) we will support museums and heritage organisations to engage (and evidence that they are engaging) a wider range of people in museums and heritage
- D. Our Digital Engagement Officer will provide **digital engagement expertise** alongside identifying emerging priority needs and opportunities for collaboration to enable increased investment, diversify online audiences and build sustainable digital capacity in the sector
- E. Our Programme Manager, in collaboration with our Data and Research Assistant, will continue to lead and operate the **Annual Museum Survey** on behalf of Museum Development England, achieving a national statistically representative sample, engaging 65% of eligible museums in the South West region, generating research findings and insights that can be adopted nationally, regionally and locally to support the resilience of the sector and demonstrate its impact



## To acknowledge the climate emergency and take an active role in the green recovery

### Why is this our priority?

The climate emergency is the most significant challenge facing society today. The cultural sector has a responsibility to reduce its own carbon footprint. Museums and heritage organisations also have a distinct opportunity to provide a space for, and contribute to, the wider debate on the impact of the climate crisis through their collections on topics such as the reduction in biodiversity, increase in waste materials and energy use. South West Museum Development will ensure that all our decisions, our investment and our own activity take advantage of this opportunity alongside taking action to minimise our own carbon footprint in delivering our service.

### What will we do and what measures will show that we have made a positive difference?

We will:

- embed a renewed commitment to reduce our own carbon footprint in delivering our work and prioritise investment where participants are seeking to take, or have taken, action to reduce their carbon footprint (A, B)
- collaborate with partners to enhance access to guidance, investment and opportunities for museums and heritage organisations to mitigate their environmental impact (C)
- promote initiatives which enable museums to educate and advocate for greater awareness of the impact of climate change and effective action (B, C, D)

### How and who?

- A. We will train our team in **Carbon Literacy** and use this knowledge to reduce our own carbon footprint
- B. We will utilise our programme of **training and grants** to demonstrate and advocate the need to **act on** the climate emergency and share practice which increases engagement in the green recovery
- C. We will deliver, in partnership with Museum Development England, the **Roots and Branches** programme<sup>6</sup> working with the **Carbon Literacy Trust** to enable museums to assess carbon emissions and take positive action to mitigate and reduce emissions and engage in the debate to support positive change
- D. We will build on existing work with **natural science collections** to unlock biodiversity data and engage broader debate on the reduction of biodiversity resulting from the climate emergency and its impact, using these collections as a catalyst for positive action on climate change

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<sup>6</sup> We will collaborate with North West Museum Development as the lead for Museum Development England in the Roots and Branches project, to increase carbon literacy and direct our own funding, alongside seeking other sources of investment, to support museums to actively reduce their carbon footprint.



## To prioritise opportunities that increase inclusion and tackle inequality

### Why is this our priority?

Museums exist to educate, entertain and inspire us all. Through their collections, museums can provide perspective, a sense of community and a place for healing, promoting understanding and learning from the past. The amplification of political and cultural tensions with widespread public debate around Black Lives Matter and gender equality continues to unfold alongside the continuing impact of Covid-19 which disproportionately affects people from minority ethnic communities, lower socio-economic groups and old people. Our sector has a responsibility, as well as an opportunity, to play an important part in shining a light on key issues about race, gender, class and environmentalism, and to support our communities to find opportunities for common ground and a fairer future.

### What will we do and what measures will show that we have made a positive difference?

We will:

- work in collaboration with our Strategic Advisory Group and Bristol Culture & Creative Industries service to build confidence and capability in our own workforce to support the sector to act on issues of inequality, diversity and inclusion (A, B)
- create new, quality opportunities for diversifying our workforce to better reflect the communities we serve (C)
- increase accessibility - physically, digitally and taking account of neurodivergence - we will raise awareness of access standards throughout our work, our partners' work and where we make investments such as through our projects and grants (D)
- work in collaboration with our fellow Museum Development partners to build confidence and capability in the sector to act on issues of inequality, diversity and inclusion, to reduce barriers and evidence this change individually and organisationally (E)
- map tangible indicators of progression in the sector to increase the number of museums recording protected characteristics for staff and/or volunteers and undertaking equity and diversity planning and activity<sup>7</sup> (F)

### How and who?

- A. Dedicate time, working individually and collectively, to develop our workforce to **achieve clarity, build confidence and capability** on issues of inequality, diversity and inclusion to ensure we can identify and act upon these issues to support positive change
- B. Develop our response to **Let's Create** at a governance and team level to ensure that our programme is able to respond effectively to, and advocate for, the values set out within its four investment principles
- C. Enhance equality and diversity in our recruitment processes and invest in new, quality opportunities to **diversify our own workforce** through paid, volunteer and freelance opportunities
- D. Utilise our programme of **training and grants** to prioritise investment in, develop awareness of, and confidence in, implementing and sharing practice which increases inclusion and tackles inequality
- E. Our national **Museum Development collaboration**<sup>8</sup> will maximise opportunities for capacity building to enable museums to increase inclusion and engage in activity which supports positive change
- F. We will use our **sector insights** to support organisations to increase their development of equality and diversity planning and activity and recording of protected characteristics for the workforce within our grant and project investment conditions

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<sup>7</sup> Targets will form part of national ACE's Museum Development reporting to include museums addressing inclusivity in their programming and practice; the number of museums supported to learn, change and embed inclusivity and diversity in response to *Let's Create*.

<sup>8</sup> SWMD is a partner in the national EDI programme, led by West Midlands Museum Development, seeking to develop sector confidence and capacity in EDI

## Measuring our Success - At a Glance<sup>9</sup>

### Connected and networked

1. The national MDN Organisational Health Check will be adopted to support prioritisation and the measures will respond to the ACE's SMART objectives, reaching a minimum of 12 museums each year†
2. Accreditation advice and reviews and recommendations of museums' eligibility to apply to join the scheme are carried out by Museum Development as outlined in ACE's updated '*Museum Development and Delivery of Accreditation Advice 2020-22 Briefing Note*†
3. Our income target for **project funding is an average of £50,000 each year\***
4. **Collaborate with national, regional and area partners to develop an application to Arts Council England which responds to and secures funding for Museum Development post 2023 delivering across the greater South West area.**



### Capacity building

5. Maintain our position as primary sector training provider for the region with a reach of over 500\* delegates, representing a minimum of 70 museum organisations, accessing skills and training provision delivered, coordinated or commissioned by SW Museum Development†
6. In 2022-23 we will develop and apply an accessibility code to ensure that 100% of our skills and training addresses access needs by 2023
7. Apply the standardised national Museum Development evaluation methodology (70% have developed new, or improved existing skills, of which 60% implement practice), meeting our Arts Council SMART funding targets†
8. In response to the impact of the pandemic we will work with 15 museum organisations strengthening their infrastructure to support a sustainable volunteer workforce and rewarding experiences for volunteers



### Sector insights and value

9. Deliver conservation and collection care expertise to 100 museum organisations through training, networks and projects. The impact of engagement will be measured through skills evaluation, project evaluation and our Theory of Change programme
10. Operate the Annual Museum Survey 2021, achieving a national statistically representative sample, engaging a minimum of 65% of eligible museums in the South West region\*†
11. A cohort of 15 Accredited museums will have access (alongside operation as a consultancy service) to South West Visitor Insights\* to evaluate and evidence audience engagement, providing a baseline from which to measure whether a wider range of people have engaged
12. Provide digital engagement development services to support digital infrastructure and progressive methodologies which reach and engage online audiences effectively, thereby raising awareness of, and appreciation for heritage collections, reaching 15 museum organisations



### Climate emergency

13. Increase carbon literacy and direct our own funding, alongside seeking other sources of investment, to support museums to actively reduce their carbon footprint and support communities to engage in the debate on the climate emergency.\* We will establish a sector baseline and enable 10% increase in museums to achieve certification in carbon literacy



### Inclusion and equality

14. Establish a robust baseline with priority museums, then we will support 8 museum organisations to develop existing or introduce new actions to support equality, diversity and inclusion†
15. Invest in and support participant museums to learn, change and embed inclusivity and diversity and will publish ten case studies to highlight and share learning†



<sup>9</sup> †Nationally consistent programme SMARTS for Museum Development with regionally agreed targets. \*The targets highlighted with an asterisk include activity delivered through aligned funding and income generated through contract work.

16. Embed inclusion and equality capacity building in our skills and training, our small grants and our grant funded projects, maximising all opportunities to effect positive change

## Programme Budget 1 April 2022- 31 March 2023

Income Headings	
<b>Arts Council England Regional Museum Development annual grant</b>	<b>£540,200</b>
<i>Local Museum Development Officer income (aligned match funding)</i>	<i>c. £120,000</i>
<b>Local Museum Development Officer income (payments via Bristol City Council)</b>	<b>£31,600</b>
<b>Digital Leadership income</b>	<b>£7,000</b>
<b>Contract income</b>	<b>£56,100</b>
<b>Project grant income</b>	<b>£50,000</b>
<i>Additional external project expenditure (based on annual target)</i>	
<b>Total income</b>	<b>£684,900</b>

Expenditure Headings	
<b>Specialist Officers: Conservation, Digital, Audiences and Volunteering</b>	<b>£172,200</b>
<b>Local Museum Development Officers</b>	<b>£165,000</b>
<b>Programme management and national working</b>	
<b>£65,800</b>	
<b>Programme governance</b>	<b>£14,700</b>
<b>Regional coordination, projects and networks</b>	<b>£42,000</b>
<b>Small grants and projects including grant administration</b>	<b>£51,000</b>
<b>Skills, events and communications</b>	<b>£42,900</b>
<b>Research, evaluation and systems</b>	<b>£56,500</b>
<b>Operational costs and contingency</b>	<b>£24,800</b>
<b>Project grant expenditure</b>	<b>£50,000</b>
<i>Additional external project expenditure (based on annual target)</i>	
<b>Total</b>	<b>£684,900</b>

## Risk Management

Risk	Threat Risk Description	Key potential causes	Key consequence	Impact category	Past Threat level 0-5	Current Threat Level 0-5	What we are doing to reduce risk	Financial Risk Level 0-5
Capacity	Capacity core programme changes in key staff in terms of capacity or specialist expertise	Increased workload, reduction in satisfaction, new opportunities or progression	Unable to achieve programme targets, increased capacity for recruitment, reputational damage due to service interruptions	Financial and Reputational	0	3	<p>Increased work plan mapping. Setting realistic targets for engagement in consultation with thematic officers</p> <p>Improved process for central team administration capacity assessment</p> <p>Working closely with Bristol City Council HR to ensure wider support is in place for the team. Ongoing stress risk assessment and mitigation process</p>	2
Capacity	Capacity to deliver additional funded projects changes in key staff capacity or specialist expertise or delays/ limitations on recruitment to project posts	Increased workload, reduction in satisfaction new opportunities or progression	Unable to achieve project deliverables, project delays, capacity to restructure project and secure approvals, reputational damage to service interruptions	Financial and Reputational	0	3	<p>Project planning includes such risks within applications and set out in project plans and budgets; reflected in contingency</p> <p>Flexible approaches to work with wider C&amp;CI team to adapt existing skills and capacity</p> <p>Regular one-to-one meetings and work plan reviews to balance priorities and prioritisation</p> <p>Strong and clear communications with funders, Actively seek out and enable alternative specialists to supplement provision.</p>	2
Capacity	Capacity of the workforce to engage in, and maximise opportunities for development support due to the unfolding impact of the Covid-19 pandemic	Redundancy, reduction or significant change in volunteer workforce, increased workloads or compressed roles; illness including Long Covid	Limited take up of programmes designed to support organisational resilience, reduced engagement and inability to achieve project investment or programme targets	Financial and Reputational	0	3	<p>Utilise local MDO and team knowledge of key sector priorities and challenges which impact on engagement with development opportunities</p> <p>Maintain flexible approach to service delivering to include access to online, self-led opportunities for skills development e.g. online learning and resources</p> <p>Increased flexibility inbuilt to programmes to allow for change in capacity and wide organisational commitment to provide opportunities for in-depth development support</p>	2
Income	Reduction in LA income to support MDO	Changes in MDO staffing, scope of work or LA funding priorities	Revision to local area MDO capacity and support offer for museums	Financial and Reputational	0	3	<p>Liaison with LAs and ongoing dialogue throughout 2022 to highlight the value of MDO/SWMD provision and evidence of return on investment</p> <p>Model impact and scenarios</p>	3
Income	Inability to secure additional project income	Limited capacity to develop or secure funding increased competition	Inability to invest in practice based projects or work in depth with consultants / additional expertise	Financial and Reputational	0	2	<p>Building projects on foundation of sector support and evidence of need</p> <p>Ensuring effective balance between ACE funded work and additional project funded activity</p>	2

## Annex - Headlines - Activity Plan

*NB - these headings will include further breakdown and individual team members' initials will be transferred into an Excel sheet (once plan is agreed) which will form individual work plans - a link below in Connected B links to an MDO specific role and functions paper.*

### Connected and networked

- A. Our specialist officers will work with national and regional **sector support organisations and partners** to share their understanding, knowledge and practice of regional needs and context, adding value to these opportunities for museums and heritage organisations in the South West of England
- B. We will invest in the local **Museum Development Officer network** to enable a trusted, independent source of credible information, inward investment, guidance and access to further sources of expertise across the region
- C. Provide timely and high quality **Technical Accreditation** Advisory service and raising sector standards
- D. We will collaborate with **Museum Development England** to enable effective development, commissioning and delivery of services alongside networking and prioritisation to provide greater impact of Museum Development for all museums across England<sup>10</sup>
- E. We will coordinate, design and **secure funding** for projects<sup>11</sup> which enable practice-based opportunities and deeper investment for participant museums and the wider sector to address priority development needs
- F. Working in collaboration with our specialist development officers and local Museum Development Officers, our Programme Coordinator will lead and **deliver high quality communications** targeted at our sector audience through the production of online content developed by our team.

### Capacity building

- A. Our specialist officers will continue to develop and deliver high quality training and specialist forums through the **SW Museum Skills programme** alongside regionally coordinated administration of the scheme and a dedicated budget for commissioning quality training providers
- B. Our specialist officer for **sustainable volunteering** will provide expertise and identify opportunities for increased investment to support rewarding volunteering experiences, sustainable capacity and measurable progress in the increased diversity of volunteers in the sector
- C. Our programme officer, working with our programme coordinator, will **administer, evaluate and adapt** our skills, forums and networks to meet the priority training needs and accessibility requirements of the sector's workforce.

### Amplify the value of heritage and collections

- A. Our Conservation Development Officer will provide **conservation and collection care expertise** to 100 museum organisations through training, networks and projects, creating increased capacity in the sector to better care for, and enhanced collections
- B. Through engagement with the **South West Visitor Insights** programme participants we will be able to evidence the change in, and diversification of, their audiences, and embed this good practice. This process will directly support the resilience of organisations whilst making a sustainable impact on increasing inclusion and relevance
- C. Bringing together **data insights** (sector and locality specific) we will support museums and heritage organisations to engage (and evidence that they are engaging) a wider range of people in museums and heritage

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<sup>10</sup> We will adopt the MDN Organisational Health Check national programme to support prioritisation and the measures will respond to ACE's SMART objectives, reaching a minimum of 12 museums each year.

<sup>11</sup> Our income target for project funding is an average of £50,000 each year.

- D. Our Digital Engagement Officer will provide **digital engagement expertise** alongside identifying emerging priority needs and opportunities for collaboration to enable increased investment, diversify online audiences and build sustainable digital capacity in the sector
- E. Our Programme Manager, in collaboration with our Data and Research Assistant, will continue to lead and operate the **Annual Museum Survey** on behalf of Museum Development England, achieving a national statistically representative sample, engaging 65% of eligible museums in the South West region, generating research findings and insights that can be adopted nationally, regionally and locally to support the resilience of the sector and demonstrate its impact

#### Climate emergency

- A. We will train our team in **Carbon Literacy** and use this knowledge to reduce our own carbon footprint
- B. We will utilise our programme of **training and grants** to demonstrate and advocate the need to **act on** the climate emergency and share practice which increases engagement in the green recovery
- C. We will deliver, in partnership with Museum Development England, the **Roots and Branches** programme<sup>12</sup> working with the **Carbon Literacy Trust** to enable museums to assess carbon emissions and take positive action to mitigate and reduce emissions and engage in the debate to support positive change
- D. We will build on existing work with **natural science collections** to unlock biodiversity data and engage broader debate on the reduction of biodiversity resulting from the climate emergency and its impact, using these collections as a catalyst for positive action on climate change

#### Equality and inclusion

- A. Dedicate time, working individually and collectively, to develop our workforce to **achieve clarity, build confidence and capability** on issues of inequality, diversity and inclusion to ensure we can identify and act upon these issues to support positive change
- B. Develop our response to **Let's Create** at a governance and team level to ensure that our programme is able to respond effectively to, and advocate for, the values set out within its four investment principles
- C. Enhance equality and diversity in our recruitment processes and invest in new, quality opportunities to **diversify our own workforce** through paid, volunteer and freelance opportunities
- D. Utilise our programme of **training and grants** to prioritise investment in, develop awareness of, and confidence in, implementing and sharing practice which increases inclusion and tackles inequality
- E. Our national **Museum Development collaboration**<sup>13</sup> will maximise opportunities for capacity building to enable museums to increase inclusion and engage in activity which supports positive change
- F. We will use our **sector insights** to support organisations to increase their development of equality and diversity planning and activity and recording of protected characteristics for the workforce within our grant and project investment conditions

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<sup>12</sup> We will collaborate with North West Museum Development as the lead for Museum Development England in the Roots and Branches project, to increase carbon literacy and direct our own funding, alongside seeking other sources of investment, to support museums to actively reduce their carbon footprint.

<sup>13</sup> SWMD is a partner in the national EDI programme, led by West Midlands Museum Development, seeking to develop sector confidence and capacity in EDI



## Our approach to embedding the Arts Council England's Lets Create Strategy

This business plan articulates how South West Museum Development will deliver against Arts Council England's new strategy *Let's Create* and its three outcomes: Creative People, Cultural Communities and A Creative and Cultural Country.

Alongside external advice and support, the South West Museum Development team and Strategic Advisory Group have been working since September 2020 to develop a Theory of Change to ensure our priorities, resource investment and decision making has a clear line of sight to the impact we are seeking to achieve. Articulating the positive social, environmental and economic impact museums make on the people and place in the south west is central to our approach. Our Theory of Change will also support us to demonstrate how our work, with museums, partners and communities, delivers against the Arts Council's new strategy. We undertake to continue to hone and develop our Theory of Change process as we plan and prepare for the next round of NPO applications 2023-27.

Where our activity is in line with, and delivers against the four investment principles and their core characteristics, this has been identified with the following key icons. This work will be developed further when we will address the Investment Principles guidance and further materials with our strategic advisory group alongside consultation with key stakeholders, as we plan for the future.



*Inclusivity and Relevance: England's diversity is fully reflected in the organisations and individuals we support and in the culture they produce*



*Ambition and Quality: Cultural organisations are ambitious and committed to improving the quality of their work*

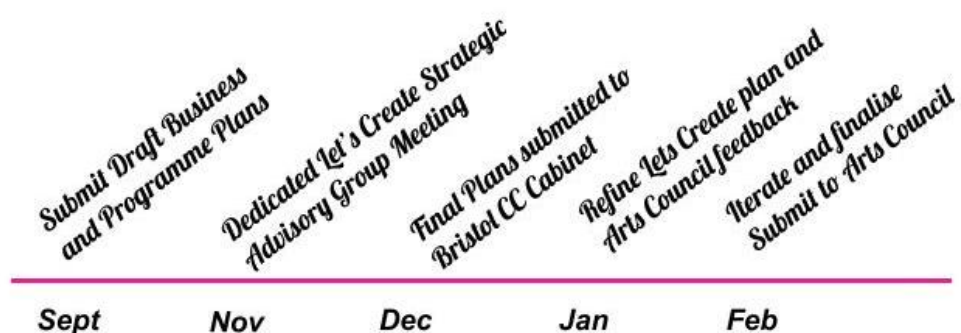


*Dynamism: Cultural organisations are dynamic and able to respond to the challenges of the next decade*







*Environmental Responsibility: Cultural organisations lead the way in their approach to environmental responsibility*

### *Let's Create ...a development timeline*



This initial timeline, September 2021 - February 2022, sets out the key stages for addressing and developing how our priorities and activity will address the four investment principles. This plan starts to identify and map where our activity addresses the principles using the icons. Importantly we have developed the whole sections of our strategic aims to specifically address and increase our focus on Environmental Responsibility and Inclusivity and Relevance.

## High Level Alignment of our Strategic Aims, Activity Plan and Lets Create Outcomes and Investment Principles

Let's Create (in development)							
Ref	Outcomes			Investment Principles			
MD SW Strategy 2022-23	Creative People	Cultural Communities	Creative & Cultural Country				
<b>Our Strategic Aim: Connected and Networked</b>							
1.A			✓	✓	✓		
1.B	✓	✓	✓	✓	✓	✓	✓
1.C			✓	✓			
1.D			✓	✓			
1.E	✓	✓	✓	✓	✓	✓	✓
1.F			✓	✓	✓	✓	✓
<b>Our Strategic Aim: Capacity Building</b>							
2. A	✓	✓	✓	✓	✓		
2.B	✓	✓	✓		✓		✓
2.C	✓	✓	✓	✓	✓	✓	✓
<b>Our Strategic Aim: Communicate and amplify the value of heritage and collections</b>							
3.A			✓	✓	✓		
3.B			✓	✓	✓		✓
3.C			✓	✓	✓		
3.D			✓	✓	✓		
3.E	✓	✓	✓		✓		
<b>Our Strategic Aim: Acknowledge the climate emergency</b>							
4.A			✓			✓	
4.B			✓			✓	
4.C			✓			✓	
4.D		✓	✓	✓	✓	✓	
<b>Our Strategic Aim: Prioritise opportunities that increase inclusion and tackle inequality</b>							
5.A			✓	✓			✓
5.B	✓	✓	✓	✓	✓	✓	✓
5.C			✓	✓			✓
5.D			✓	✓			✓
5.E			✓		✓		✓
5.F			✓	✓			✓