



Date: 27 March 2024

INVITATION TO QUOTE FOR: Organisational Health Programme and Midlands Trustee Network facilitation for Museum Development Midlands. (MDM)

Introduction

The Museum Development Midlands programme (MDM) invites your quotation to deliver the Organisational Health Programme and Midlands Trustee Network strands of its support work.

The contractor(s) will:

- 1) Deliver the Organisational Health Programme (30 days), including**
 - a. Intensive Organisational Health Support**
 - b. One to One Organisational Health Surgeries**
 - c. Organisational Health contribution to MDM internal team meetings**
- 2) Develop and deliver a Midlands Trustee Network (6 days), including**
 - a. Amalgamating existing Trustee Networks and coordinating new Midlands Trustee Network**
 - b. Developing and delivering Midlands Trustee Network support programme**

Please note that these contract elements could be bid for collectively or as separate elements.

MDM will consider applications from agencies, individual freelancers, or a team of freelancers if you wish to apply as a group.

The initial contract will run until the end of March 2025 with the potential to extend annually until March 2027 with budgets and outputs agreed on an annual basis.

About Us

From April 2024 Museum Development in England will be delivered by five area providers. Museum Development extends across the UK and forms the national Museum Development Network. Each provider tailors opportunities for participation in schemes, training, grants programmes and networks based on an informed understanding of the context and needs of museums in their area.



The MDM programme will invest in the development of individuals and organisations via a range of advice, information, initiatives, and small grants and directly supports the delivery of the UK Accreditation Scheme for museums and galleries in England.

There are currently 241 Accredited museums across the Midlands region, plus 24 who are formally Working Towards Accreditation. The sector includes English Heritage, Independent, Local Authority, National Trust and University; with a diverse range of collections covering archaeology, archives, buildings, ceramics, costume, decorative and fine art, geology, industrial heritage and social history.

Specification

The Organisation Health Programme and Midlands Trustee Network will contribute to MDM's aim to support museums to operate more effectively, increasing their long-term viability and relevance. MDM's support is delivered through direct advice, grants, training provision, facilitated networks, workshops and tailored, intensive activity.

The contractor would operate within the framework of the MDM programme, which is currently funded through Arts Council England (ACE) from April 2024 to March 2027.

1) Deliver the Organisational Health Programme (Minimum of 30 days)

MDM are seeking a freelance individual, agency, or team with the expertise to lead a programme of structured support to help museums understand and improve their organisational health requirements.

The Organisational Health Programme consists of:

a) Intensive Organisational Health Support

Support for approximately six museums involving intensive one to one development support with governance/organisational health using the MDM diagnostic tool. Support museums to develop action plans and, where applicable, help museums access MDM small grants to enable implementation of aspects of the action plan. Support the six museums to undertake the Museums Organisational Health Check (MOHC) to better understand their priorities and provide benchmarking data,

Six museums offered four days support per organisation (circa 24 days)

b) One to One Organisational Health Support Surgeries

Minimum of 12 professional one to one support surgeries provided. Allocated flexible days to cover time spent on incoming enquiries, alongside MDM team, to provide advice to organisations with emerging organisational health and governance queries as needs arise throughout the year.

(circa 4 days)

c) Organisational Health Contribution to MDM Internal Team Meetings

Support MDM's programme by providing insight and sector intelligence. Input into business planning sessions along with other team input such as occasional team meetings or planning sessions. To support administration of small grants through participation in grants panels where appropriate. Support MDM team with collating information for programme reviews, evaluation and development of case studies (for publication on MDM website and in newsletter).

(circa 2 days)

General approaches to delivery of the Organisational Health contract

- To champion Accreditation and other recognised standards as appropriate
- To be part of the regional museum development "team" of both staff and freelancers engaged through the programme. This includes attending occasional team meetings and regular correspondence with the team about: a) museums being advised and how, b) needs identified which could be met more widely by MDM offer c) areas of concern.
- The contractor must be able to answer email/ telephone enquiries within three working days unless on a period of leave/ sickness
- Reporting and contract monitoring meetings will take place monthly by phone/ email/ face-to face to share issues/progress/ concerns. Short, written update reports to all team members should be provided quarterly. Email updates to the team to be provided as required. Annual reports (detailing progress and activity) should be provided by mid-March each year. Reports should focus on support provided during the period, museums engaged and to what level, evaluation of impact of support and follow up, next steps, issues and concerns, achievements, potential grant applications and signposting made to other funders.
- To support museums to provide written case studies (as above)/ updates to programme officer for recording the outputs of the project (only where significant intervention has taken place) and updates for e-news and for quarterly reports to MDM Advisory Board and ACE (via MDM Manager).
- To keep basic data about enquiries handled eg number, museum, type and outcomes
- An understanding and commitment to delivering the requirements of the contract in a flexible way. This is likely to involve some weekend or evening work to accommodate the needs of all museums.

Key outcomes of the Organisational Health contract:

- Six museums undertake the Museums Organisational Health Check to better understand their priorities and provide benchmarking data
- Six participating museums will have created activity plans linked to the consultancy support
- Consistent levels of high-quality advice
- High-quality Accreditation applications where intervention has taken place
- High-quality MDM grant applications
- Museums with better awareness of needs following self-assessment
- Museums have realistic and achievable, up to date forward plans that are linked to financial planning, making them stronger, more resilient organisations
- Better awareness of needs of museums by MDM (through use of diagnostic) to inform planning and delivery
- To deliver two case studies over the course of the contract

2) Develop and deliver a Midlands-wide Trustee Network (Minimum of 6 days)

MDM are seeking a freelance individual, agency, or team with the expertise to successfully amalgamate the two existing East Midlands and West Midlands Trustee Networks and develop and deliver a programme of peer-to-peer meetings, training and networking opportunities to support Midlands Trustees.

a) Amalgamating sub regional Trustee Networks and coordinate new Midlands Trustee Network

To amalgamate the two existing Trustee networks, including advocacy and promotion to encourage new joiners. Responding to ad hoc email queries from network members. Email updates signposting Midlands Trustee Network to upcoming MDM and sector partner opportunities.

b) Develop and deliver Midlands Trustee Network support programme

Using data, sector insight and feedback from Midlands Trustee Network, develop and deliver four events to support their needs including an introductory online event and a mix of online or in person networking and skills development training events.

General approaches to the delivery of the Trustee Network Development contract

- The contractor must be able to answer emailed/ telephone enquiries within three working days unless on a period of leave/ sickness

- Reporting and performance/ contract monitoring meetings will take place monthly by phone/ email/ face to face to share issues/ progress/ concerns. Short, written update reports to all team members should be provided quarterly.
- Email updates to the team provided regularly as required.
- Annual reports (detailing progress and activity should be provided by mid-March each year. Reports should focus on support provided during the period, museums engaged and to what level, evaluation of impact of support and follow up, next steps, issues and concerns, achievements.
- To keep basic data about enquiries handled eg number, museum, type and outcomes
- An additional budget will be made available of up to £2,000 to cover the cost of training delivery including bringing in speakers or facilitators for network events and training venue costs.
- An understanding and commitment to delivering the requirements of the contract in a flexible way. This may involve some weekend or evening work to accommodate the needs of different museums.

Key outcomes of the Trustee Network Development contract:

- Successful amalgamation of sub regional networks and delivery of training
- Delivery of four trustee network events for board/ trustee development
- A minimum of 20 museum representatives attend network sessions
- Four strategic grant applications completed by participating museums for board/trustee development

Input from MDM

The contractor will have access to administration support from the central MDM team including booking venues. Venue hire costs/ catering will be covered centrally by MDM when booking any in person training events, and the MDM Zoom can be used for any online events. The MDM programme officer(s) will actively support promotion of events and provide support to the contractor directly (as required and to be negotiated).

MDM is seeking candidates with the following experience and expertise:

- Experience working in or with a range of different types of museums including local authority, independent and volunteer run.
- Experience working with charities or not-for-profit organisations
- Familiarity with the legal and ethical issues faced by museums
- Interpersonal skills and the ability to build professional yet supportive rapport with clients quickly

- Strong verbal and written communication skills, with the ability to convey complex information clearly and concisely to clients
- Discretion, sensitivity, and the ability to treat discussions with the upmost confidentiality
- Understanding of current Museum Accreditation requirements
- Strong practical knowledge of museums, heritage and current issues affecting the sector
- Experience or knowledge of Midlands museums and their key organisational challenges
- Knowledge of sector funders, stakeholders and support organisations

Timescales and key dates:

MDM is working to the current timeline:

- Invitation to quote closes: Friday 19 April 2024
- Interviews week commencing: Monday 29 April 2024
- Successful applicants notified at the latest: Tuesday 7 May 2024
- Contract commencement date: Monday 13 May 2024

Project budget and payment terms

The maximum budget is £18,000 including all expenses and VAT to the end of March 2025.

There are two separate elements to the budget:

- £15,000 inc VAT for organisational health
- £3,000 inc VAT for the trustee network element

This work is funded with public money through Arts Council England, so it is imperative that we follow 'best value' principles when appointing our consultancy partner.

Payment will be made in quarterly instalments by MDM (Ironbridge Gorge Museum Trust). Please note, as this is a freelance opportunity the successful applicant will be responsible for arranging their own National Insurance and tax.

Your Proposal and Costs

If you are interested in working with us please provide a written response to this brief covering the following criteria:

- Your approach to the project
- How you meet the required expertise and experience
- A summary of your project process and how we would work together, including addressing potential project problems
- How you would approach the delivery
- Itemised project costs by activity, hosting charges and payment schedule



- Delivering comparable projects, this should include two references for clients you have worked with in the past three years or any testimonials from similar contracts you feel would support your application.

Please email to Helen Martinez, Museum Development Programme Officer
helen.martinez@leics.gov.uk

Any queries or things you would like to discuss beforehand?

MDM is more than happy to discuss the project with you beforehand and answer any queries you may have.

Please contact Helen Martinez at helen.martinez@leics.gov.uk to arrange a friendly, informal phone call or Teams chat.

Prepared by:

Helen Martinez – Museum Development Programme Officer, Museum Development Midlands.