

Organisational Health Check Grant 2021-22

Guidance Notes

About this grant

South East Museum Development grant schemes are funded by Arts Council England.

This scheme offers grants of £1000 to help museums address a key development need identified in the Organisational Health Check's Advisory Report.

The grant is open exclusively to museums that have completed the Organisational Health Check in 2021-22.

We encourage museums to 'think big'. Our small grants can be used as match funding, or to pilot ideas for larger grant requests to Arts Council England, National Lottery Heritage Fund, and other providers.

How much can I apply for?

Applicants can request £1000.

When is the application deadline?

We are accepting applications from 1 October 2021 to 1 February 2022.

We will assess applications on a rolling basis and aim to contact museums regarding the success of their application within two weeks of submission.

Who can apply?

- museums that are Accredited, or formally working towards Accreditation
- located in Surrey, East & West Sussex, Kent, Oxfordshire, Buckinghamshire, Berkshire, Hampshire, Isle of Wight.

We cannot accept applications from non-accredited museums, national museums, or national portfolio organisations (NPOs).

We will prioritise applications from museums that are first time participants in the Organisational Health Check scheme in 2021-22.

Successful applicants must:

- Complete the proposed activity within 12 months of receiving funds
- Send us an itemised list of expenditure as part of their final report
- Submit visitor data to this year's Annual Museum Survey in 2022 (registration in June/July 2022; survey deadline Sept 2022). Failure to comply will render the museum ineligible for SEMD grants until April 2023.

How do I submit my application?

- Contact your local [Museum Development Officer](#) (MDO) to discuss your application before you apply.
- Read this guidance document carefully.
- Complete the [online Grant Application Form](#)
- We will email you a PDF copy of your submitted form within 1 week of submission for your own records.
- If you need the application form in an alternative format, please contact us on office@southeastmuseums.org

What should I include in my application?

- A description of the activity you would like to undertake, and how it supports your museum's development.
- A clear link to how the proposed activity responds to recommendations outlined in the Organisational Health Check Advisory Report.
- The names of those involved in delivering the grant and the timescales involved.
- An outline on how you will evaluate the success of your project. Look at the [Evaluation Toolkit](#) prepared by our museum development colleagues at ShareEast for guidance.
- A statement on how you will ensure your project is accessible and inclusive (e.g., using best practice guidance or working with new audiences; inclusive recruitment; community involvement) and

environmentally responsible (e.g., using recycled materials, minimising travel; sourcing local suppliers; energy saving devices).

- A budget proposal listing a breakdown of expected costs.
- Your application must be supported by a second person at senior level from your organisation, (e.g., Chair, Director, Manager), before it can be submitted.

What don't we fund?

The grant cannot be used for:

- Basic utilities and core costs
- Staff time/salaries (unless you are offering additional hours to part-time or casual staff to deliver grant activity).
- Something we, or another funder, has already funded
- Work that has already been undertaken
- Activity that does not support the development needs outlined in the OHC Advisory Report.

How will my application be assessed?

- Your applications will initially be separately assessed against the eligibility criteria by your local Museum Development Officer and another member of the SEMD team.
- Museums will be informed of the outcome of their applications within two weeks of submission.
- Unsuccessful applicants may revise and resubmit their application for consideration in following rounds.

How do I claim my grant?

- Successful applicants will receive an offer letter by email. This will confirm the amount of the grant award and any special conditions in addition to the general terms and conditions set out in this document (see Standard Conditions of Grant).

- The offer letter will be accompanied by an Acceptance Form. To accept the grant under the terms it is offered, this acceptance form must be signed and returned by the deadline stated in the offer letter, or the grant offer may be withdrawn.
- If the application is not successful, your local Museum Development Officer can provide feedback.
- A **Financial Supplier Form** must be completed and returned, so that we can create a unique Purchase Order (PO) number linked to your grant. You will be sent this form if you are not already set up on our finance system.
- Once you have been given a **Purchase Order (PO) number**, you may send us an **invoice for 100%** of the grant total. Please quote the PO number on your invoice.
- You will be required to submit a **final report** to SEMD at the end of the project and have a follow up interview with your local Museum Development Officer by March 2023.
- For any questions regarding invoicing and grant payment, please office@southeastmuseums.org

Who are my key contacts?

Your local Museum Development Officer (MDO) is your key contact. They can provide you with advice and guidance on how to complete the application form, and additional support around developing your project or activity idea.

East Sussex & Surrey
West Sussex & Surrey
Kent & Medway
Kent & Medway
Oxfordshire & Bucks
West Hants & Berks
East Hants, Solent & IoW

Helen.Derbyshire@southeastmuseums.org
Juliet.Thomas@southeastmuseums.org
Samantha.Bowen@southeastmuseums.org
Joanna.Low@southeastmuseums.org
Sarah.Menary@Oxfordshire.gov.uk
Stephen.Lowy@hampshireculturaltrust.org.uk
Katrina.Burton@hampshireculturaltrust.org.uk

Standard Conditions of the Grant

These grants are funded by South East Museum Development (SEMD) and Arts Council England (ACE). As these are public funds, we need to ensure they are spent responsibly and transparently.

- ACE and SEMD should be acknowledged in any publicity or promotional material produced in association with the project or activity. Logos can be downloaded from <https://southeastmuseums.org/logo-downloads/>
- The grant must not be used for any other purpose other than that stated in the grant application.
- The recipient agrees to submit a Final Report with an itemised list of expenditure by March 2023.
- If your project is not set to finish by the agreed date, you must inform your local Museum Development Officer to discuss and agree options. Severe slippage in delivery timescales may result in the grant being reclaimed by South East Museum Development.
- SEMD may request evidence of expenditure (e.g., copies of receipts, invoices, etc.) as part of our audit process. Failure to produce evidence of expenditure may result in SEMD requesting the return of funds.
- Grant recipients are required to submit visitor and admissions data to the Annual Museum Survey in 2022 (registration June/July 2022; survey deadline Sept 2022). Failure to comply will render the museum ineligible to receive SEMD grants until April 2023.
- You must ensure the funded activity is delivered in an environmentally responsible way.
- You must ensure that funded activity is inclusive and accessible to all.
- SEMD may ask you to submit or present a project case study as a way of spreading good practice and to encourage museums to share their success stories. ACE and SEMD reserves the right to publicise case studies where appropriate.
- If you plan to use consultants for this work, we ask you to follow the [key principles of working with freelance consultants](#) as outlined by our colleagues at South West Museum Development.
- You will be asked to evaluate the programme to help us improve our service.
- You must comply with your employer's guidelines on liaising/engaging with furloughed colleagues (if applicable).
- Where funding for subsistence is agreed, this will not exceed the HMRC guidance rates of £5 for breakfast, £5 for lunch and £15 for an evening meal. Breakfast and evening meal costs can only be included for activities that require an overnight stay. Alcoholic drinks are not included.
- Where funding for travel costs is included, this will be for standard class travel on public transport. Any mileage will be reimbursed at 45p per mile for cars/vans.

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Online Application Questions

- You can find a link to the online application form on our [Grants website](#).
- Prepare your answers in advance by using questions listed below.
- Complete your online application in one go and be sure to click 'submit'.
- If you make an error, or wish to amend your submission, we can delete the incorrect application and you can resubmit an updated version.
- If you need technical advice or access assistance to submit your application, please contact office@southeastmuseums.org
 - Which grant are you applying for?
 - Name & post code of museum
 - Accreditation number:
 - Lead contact: name, job title, phone, and email
 - Senior manager approval: name, job title, and email
 - Which Museum Development Officer did you discuss your application with before submission?
 - What is the name of your project?
 - Provide a short description of the project you are asking us to support. (50 words)
 - How does this project respond to the key development priorities identified in your Organisational Health Check Advisory Report? (50 words)
 - Tell us about the project in more detail. What do you intend to do with the funding? How? When? Why? (300 words)
 - What difference will this funding activity make to your museum? How does it feed into your museum's Forward Plans? List a maximum of four intended outcomes.
 - How urgent is this work to your organisation? How will you meet these needs if this application is not successful?
 - How will you evaluate the success of the project?
 - Who will carry out the work? *If you plan to use consultants for this work, we ask you to follow the [key principles of working with freelance consultants](#) as outlined by our colleagues at South West Museum Development.*
 - How will you ensure your project is environmentally responsible? *Consider things like minimising travel; sourcing local suppliers; conducting meetings using virtual platforms; upgrading to energy saving devices; sharing resources with partners; using recyclable materials....*

- How will you ensure your project is inclusive and accessible?
Consider things like improving the diversity of your board & workforce; having fair and equitable recruitment procedures; community involvement; developing collection; removing barriers to access...
- Is the museum VAT registered?
- Provide a list of your estimated costs (e.g., consultant's fee £550, storage boxes £35, etc). If your museum is VAT registered, provide costs without VAT.
- How much money are you asking for?
 - A. total sum of your estimated costs
 - B. Total contribution from the museum and/or other funders
 - C. Total amount you are requesting from us (A-B=C)
- What type of museum are you? (e.g., independent, local authority, university...)
- What is the make-up of your museum workforce? (Number of volunteers/staff)
- How many annual visitors did your museum attract before the Covid pandemic? (Visitor figures before the Covid pandemic.)
- If we do not already hold your contact details, can we add them to our mailing list? This will ensure you receive our newsletter and programme updates. We do not share our contact lists with third party partners.

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Online Final Report Questions

- We will send you the Final Report template by March 2023.
- Please discuss your progress with your local Museum Development Officer before submitting the report.
- Refer back to your Organisational Health Check survey and Advisory Report in preparing your answers.
- Complete all funded activity within 12 months of receiving the funding.
- Prepare your answers in advance by using the questions listed below.
- If you have questions or need assistance, please contact office@southeastmuseums.org
 - Your name, job title, and email
 - Museum: name, postcode

About the Organisational Health Check

- Summarise the key development needs that were identified in your Organisational Health Check Advisory Report.

Theme one:

Score:

What your museum does well:

What your museum would like to work on:

Have your goals been met? *Consider the scope, timescale and external factors which have influenced your work.*

Theme two:

Score:

What your museum does well:

What your museum would like to work on:

Have your goals been met?

Theme three:

Score:

What your museum does well:

What your museum would like to work on:

Have your goals been met?

About your Accreditation 'areas for development'

- Summarise the development needs that were identified in your during your most recent museum Accreditation assessment.
- Have any of these issues been resolved through the Organisational Health Check process?

About your Organisational Health Check grant (£1000)

- How was the grant funding used?
- What difference has the funding made to your museum?
- Is there any outstanding activity that has yet to be completed?
- What did you learn from the activity?
- Please provide an itemised list of expenditure.

Image Bank

- Please share up to 3 photographs of the funded activity with us. We will credit the source of any photos we use, and automatically delete the images we collect after 4 years. Be sure you have permission to share the images before uploading them into the Image Bank. [South East Museum Development Image Bank](#)