



Museum Development Network

MDN Museums' Self-assessment Methodology: Formative Evaluation Brief 2018-19

Background

The Museum Development Network (MDN) was set up to support collaborative working across museum development providers in the UK. MDN is directed by the Museum Development Committee (MDC), which is made up of representatives from each MD team.

The Museum Development Programme (MDP) in England is a programme of support for museums across the nine regions of England. Museum Development believes in thriving museums. It raises standards and drives excellence by enabling, guiding and supporting people working in museums.

Each MD provider has secured funding from Arts Council England (ACE) to be Sector Support Organisations (SSO) for 2018-22 within Arts Council England's National Portfolio. Each MD provider run programmes of development to enhance museums in response to Arts Council England's 5 strategic goals: [ACE 5 Goals](#).

For the funding period 2018-22, MD teams have new national SMART objectives to deliver and report against for ACE around the 5 strategic goals. One of the SMART objectives is: ***“to use a nationally-consistent diagnostic toolkit including relevant Accreditation elements as appropriate, to enable more museums to be resilient as a result of museum development interventions”*** with the measures of ***“by January 2019, to have a nationally consistent diagnostic toolkit developed collaboratively with ACE. By January 2019, a regionally agreed timed plan to achieve a baseline audit of museums' organisational resilience and development. From January 2019 a regionally agreed % of museums being supported to meet their business needs- as identified through the use of a diagnostic toolkit; % increasing over the four years with a national minimum to be agreed centrally by January 2019. RMs will negotiate the Y2 onwards targets in Jan 2019 as a payment condition for Q1 2019/20 investment”***.

It has been agreed that in practice, by nationally-consistent diagnostic toolkit we mean a diagnostic approach to identify a museum's development needs that will be informed by a range of sources, which may include self-assessment, Accreditation intelligence, annual data, a museum's own forward/business plan and other Museum Development information.

MDN have established a Business Diagnostic working group, with representatives from each region and the ACE Senior Manager, Museum Development. The working group is tasked with developing an approach, in response to the above SMART, taking into account the range of tools and sources of information MD teams use to capture the development objectives and business needs of museums in the regions (e.g. Self-assessment organisational health checks, collections Health checks, peer review, annual data survey, Accreditation data).

Some MD providers have an established unique system comprising a diagnostic approach to working with museums while others have never used diagnostic tools as a structured approach. As a result, the working group committed to a pilot programme between April and July 2018 to enable MD regions that had not previously utilised a diagnostic approach to trial various methods of delivering a diagnostic assessment, based on their available resources and regional MD delivery model. These regions have utilised the East Midlands Business Diagnostic toolkit, which had been in use for 3 years and had been designed as a self-assessment tool for museums to evaluate their performance.

Brief

Manchester University, on behalf of the MDC, seeks a consultant with relevant experience and expertise to evaluate the national pilot of a methodology of museums' self-assessment. The methodology is currently operating as a national pilot in each region during 2018-19 and builds on the East Midlands Museum Development self-assessment business diagnostic. The evaluation findings will inform the development of a national self-assessment methodology in preparation for implementation from January 2019. This work will support MDN to develop a collective response to the ACE SMART objective and to support the following objectives: the MD programme development; resilience of museums in the nine English regions; identification of national trends and needs of museums; and track some of the impact of MD interventions and support given to museums.

This work would form Stage 1 of a formative evaluation process. Stage 2 is to be separately commissioned in 2019-20 following the implementation the self-assessment tool across the nine regions for a sufficient period of time.

Scope of the brief

Stage 1 of the formative evaluation will cover;

- Evaluation of the national pilot of East Midlands MD Self-Assessment Tool across participating regions including assessment of museum user feedback, consultation with MD teams, an examination of the effectiveness of the pilot in terms of its impact on participating museums and a review of methods of delivery and implementation inclusive of resources required for implementation. (The impact the tool has on the improved resilience of participating museums will be looked at in detail in Stage 2 of the evaluation).
- A review of current tools and methodologies applied in various regions to assess need/priorities against ACE SMART objective with recommendations for improvement, taking into consideration pilot evaluation, MD data management infrastructure, the need for national consistency, the systems and capacity of MD providers to implement the tool, and the potential of the self-assessment tool may have on museum resilience.
- Review of the content and format of reporting templates generated for site-specific advisory reports following self-assessment, and make recommendations for the development of nationally consistent reporting including key functions such as signposting to other ACE funded SSO offers.
- Produce an outline CPD plan and national guidance for MD teams for effective implementation of the process taking account of the varying methods of implementation across regions (information on approaches in appendix 1). Possible topics could include: coaching, facilitation, report writing, how to be 'agents of change'.
- Exploration of the impact the data collected through implementing the tool can have and how it can be collated, stored and effectively presented.
- Production of a final report and draft plans and documents relating to the above to be presented to MDN Committee and MD Business Diagnostic working group at the end of the contract.

Contract Fee

The contract fee is a maximum of £15,000 inclusive of expenses and VAT, starting in October 2018 and finishing in December 2018. Payment will be made on receipt of a satisfactory **final report on 14th December 2018**. MDN have secured funding for this contract from Arts Council England. The contract will be administered through Museum Development North West, University of Manchester. The Business Diagnostic working group will act as the project steering group.

Required Key Skills

- **Facilitation skills** – we are seeking to develop an effective, nationally cohesive organisational self-assessment tool and methodology that can be used flexibly across the nine regions. The consultant will need to consult and engage each MD team to understand their regional needs in terms of implementation, capacity and programming.
- **Evaluation/ impact assessment** – experience of evaluation of programmes with similar complexities will be essential. The formative evaluation needs to include the needs and value of the tools/methodologies for the following stakeholders: end users (museums); MD teams and their effective implementation of the tool/methodology; and the assessment and application of the data collated through the process.
- **Development of CPD and Guidance frameworks** – the development of a CPD framework for MD providers to support effective implementation of the methodology/tool will directly inform the development of MD teams' ability to launch it in January 2019.
- **Understanding of MD and SSO roles** – to carry out a formative evaluation of the tools and methodologies used, a good grasp of the role of MD and other SSOs is essential, including the national and regional delivery models and how the self-assessment tool can be developed to include other relevant ACE MD SMART Objectives e.g. Creative case, peer review etc.

Proposal to tender

The consultancy proposal to tender should include:

- Project timetable, budget/pricing breakdown indicating any VAT payable and include this in your quotation if relevant
- Details of the relevant experience and competency possessed by the consultancy and any other personnel who will work on the consultancy
- Details of how they will undertake the programme of work outlined above
- Details of outputs to be given to MDC against the deliverables outlined in this brief

The deadline for proposal submission is **5pm on the 7th September 2018**. The interview date for short-listed proposals is **25th September 2018**. The successful consultancy will be informed by the **1st October**. The inception meeting will take place with the successful consultant on the **3rd October 2018**. The location for interview and inception meeting are to be confirmed.

Evaluation Criteria

We will evaluate your tender against the following criteria:

Criteria	Weighting
Value for money	20%
Strength of proposal	45%
Relevant experience and skills	35%

Please submit your proposals to Kaye Hardyman, Vice Chair of MDN Committee: kaye.hardyman@manchester.ac.uk cc. Claire Browne, Chair of MDN Committee: Claire.Browne@leics.gov.uk. For further details contact Kaye Hardyman.

Appendix 1:

External evaluation reports and information relating to the existing self-assessment tools and methodologies, including the pilot of the East Midlands Tool, will be supplied to the successful candidate in preparation for an initial meeting at the start of the consultancy. Contact details for regional teams will also be provided along with any existing evaluation and user-feedback from the use of self-assessment tools.

MD teams that have previously used self-assessment tools to support the development and resilience of museums have applied various methods of implementation. It is likely that this varied approach will continue which means the nationally consistent tool has to be flexible enough for MD to use it as:

-A purely self-assessment tool available to all museums to use via MD team website with the option of submitting results to MD to get a bespoke Advisory Report.

-A mandatory self-assessment tool that then has to be submitted to MD along with Forward Plans to enable museums to access MD support, programmes and grant funding. Advisory reports to museums may or may not also be sent back to the museums.

-A tool used by MD teams in facilitated sessions with museum staff and boards. Advisory reports may or may not be developed as a result and there may be potential for bespoke packages of support to be designed to fulfil need.

-A tool to develop MD programming to ensure it meets need of regional museums.

-A tool that is mandatory for a cohort of museums that are participating in specific MD programmes e.g. organisational resilience programmes.

-A tool that enables Museum Development regions to demonstrate impact through collated data.