

# Heritage Compass Business Support England

Recruitment Pack 2020



## **About the Programme**

Heritage Compass is a new Business Support Programme for small and medium sized heritage organisations across England.

Funded by the National Lottery Heritage Fund and delivered by *Cause4* in partnership with the Arts Marketing Association (AMA) and Creative United, this Programme will work with 150 heritage organisations across the next two years.

The mission of the Programme is to:

- **Close the skills gap:** There are currently fewer staff in the heritage sector receiving training than in other parts of the cultural sector
- **Diversify funding:** Many heritage organisations receive less of their turnover from private sources than other sectors
- **Grow operational knowledge:** 34% of heritage organisations say their workforce lacks understanding about how their organisation works
- **Strengthen Leadership:** We need to encourage joined-up thinking to address vulnerabilities and threats
- **Identify innovative solutions to financial and environmental threats:** The heritage sector faces unprecedented financial and environmental problems, added to by COVID-19, calling for fresh and inventive solutions

Through this Programme, we aim to create a better connected, informed and resilient heritage landscape across England. By taking part you will gain essential skills in business planning, audience and stakeholder development, leadership and change management.

It is important to note that the focus of the Programme will be on sustainability and long-term solutions for the sector. Whilst organisations experiencing difficulties due to COVID-19 will be eligible to apply, this Programme is not focused on solving short-term problems. If you need more immediate support, please take a look at the [Rebuilding Heritage Programme](#), funded by the National Lottery Heritage Fund.

**We have 150 spaces available for small or medium sized heritage organisations based in England.**

**You can be a Registered Charity; Charitable Incorporated Organisation; Community Interest Company; Social Enterprise; B Corporation or Not-For-Profit.**

**We particularly welcome applications from micro-organisations and start-ups.**

### **Who is it for?**

This Programme is for small or medium sized heritage organisations that have an ambition to become more resilient, connected and informed.

### **What do we mean by Heritage?**

Any heritage organisation as defined by the [Heritage Fund](#) can apply to join the Programme. This might include historic houses, community heritage projects, maritime and industrial heritage, churches and faith buildings, conservation and wildlife trusts, park and natural environment and libraries and archives, amongst others.

If you are not sure if you classify as a heritage organisation, please take a look at the Heritage Fund website [here](#).



Collections



Cultures and Memories



Historic Buildings and Monuments



Community Heritage



Landscapes and Nature



Industrial, Maritime and Transport

### **Who can apply?**

We are offering places for up to two people per organisation to take part in the Programme. In order to apply you need to:

- Have a maximum turnover of £1,000,000.
- Be considered a heritage organisation as defined by the [Heritage Fund](#).
- Be either a Start-Up; Registered Charity; Charitable Incorporated Organisation; Community Interest Company; Social Enterprise; B Corporation or Not-For-Profit.
- Be based within England.
- Be at a Manager level or above (can be in a high-level voluntary role i.e. a Trustee).

## Programme Details

Throughout the Programme, you will receive:

- Six training courses, covering topics including business planning, fundraising and income generation, governance, financial planning, earned income and audience development.
- Up to five places at two Symposiums for your organisation, which will bring all delegates together to identify and share best practice and will include expert guest speakers and roundtable discussions.
- Access to eLearning, including the accredited course 'Arts Fundraising and Leadership' developed in partnership with the University of Leeds, and an online course for the heritage sector on business planning, fundraising strategy and implementation.
- A critical friend and personal mentor, with access to regular one to one support.
- Ongoing access to the heritage benchmarking dashboard.

## What's in it for me?

The Programme will be designed around the outcomes you want to achieve, depending on the needs of your organisation.

By the end of the Programme your organisation could have:

- A developed or re-invigorated Business Plan
- More effective governance and financial planning
- Created a process to manage internal culture change
- Developed or re-invigorated its income generation strategy
- Developed or re-invigorated its audience development plan
- Gained an understanding of how to use benchmarking to inform decisions
- Created an improved network and increased confidence

**Depending on your desired outcomes, your organisation will be placed in one of six cohorts, giving you a chance to gain peer support from organisations with similar aims.**

**The Programme will begin in phases, with the first two cohorts starting training in late January 2021.**

### **How much will it cost me?**

The Programme is free to participants and we will cover your travel to training and the symposiums.

Your organisation will be asked to allow you time away to attend the training and symposia but won't incur any other costs.

We suggest you allocate at least 10 days for training and up to three hours per week for personal reflection, learning and mentoring.

### **Backfill Grants**

As part of the Programme, we are also offering eligible organisations a grant of up to £5,000. This is to help widen access to the Programme and to allow smaller organisations to participate.

If you would like to request funding as part of your application, please tell us how much you require and what the money will go towards. Some examples might include:

- Covering costs of staff absences whilst on the Programme
- Providing interim cover for staff whilst participating in the Programme

The grant is primarily aimed at heritage organisations with a turnover of less than £250,000 per annum and with less than five staff. Eligible organisations will be able to claim up to a maximum of £5,000.

## **How to Apply**

We will have two rounds of applications for this Programme, giving you plenty of time to prepare your application and decide who in your organisation will take part in the training:

### **Round One**

- 6<sup>th</sup> November 2020 – deadline for applications
- 16<sup>th</sup> November 2020 – applicants informed

### **Round Two**

- 16<sup>th</sup> December 2020 – deadline for applications
- 11<sup>th</sup> January 2021 – applicants informed

Before completing the application, please check that you fulfil the essential criteria outlined above.

[Click here](#) and submit your application via SurveyMonkey online. You will need the following information to complete your submission:

- Organisation name
- Company number
- Registered Charity Number (if applicable)
- Organisation address and geographic location
- Organisation turnover
- Your current financial situation and the impact of Covid-19 on your work
- Lead applicant name, role and contact details
- An overview of your vision, mission and objectives
- Your intended outcome from the Programme
- An overview of why you are applying to the Programme and what you hope to get out of it
- Your Case for Support, including the impact of not participating in the Programme
- A personal statement outlining what you would bring to the rest of the cohort
- Details of your request for funding (if applicable), including the amount requested and what the funds will be used for

Once your application has been submitted, we will review it and will let you know via email whether you have been successful. Applicants requesting funding support may be asked to answer a series of follow-up questions with David Johnson, Director of Strategy and Programmes at *Cause4*.

### **About the Partners**

**Cause4** is a social enterprise and B-Corporation that specialises in fundraising and philanthropy, training, support and advice and programme design.

**The Arts Marketing Association** is a membership organisation with over 2,000 members working at all levels in the arts, culture and heritage sector. The organisation helps its members make better connections between art and culture and the public, providing professional development for those working in cultural marketing and management.

**Creative United** is a Community Interest Company that provides a range of financial products and services designed to enable the growth and development of the UK's cultural and creative industries.

**The National Lottery Heritage Fund** uses money raised by the National Lottery to **inspire, lead and resource** the UK's heritage, to create **positive and lasting change** for people and communities, now and in the future.

### **Further Information**

We welcome applications from people of all backgrounds to reflect the diversity of the sector across England. Our definition of diversity encompasses responding to issues around race, ethnicity, faith, disability, age, gender, sexuality, class and economic disadvantage as well as any social and institutional barriers that prevent people from creating, participating or enjoying the arts, culture or heritage.

We are keen to ensure that the benefits of this Programme are spread across the three English regions as outlined by Heritage Fund, including the North; the Midlands and East, or South East, South West and London.

For further information about the Programme or the work of *Cause4* please contact David Johnson, Director of Strategy and Programmes: [David.johnson@cause4.co.uk](mailto:David.johnson@cause4.co.uk)

*“This Business Support programme comes at a moment of global upheaval as we look to rebuild post Covid-19. Supported by the National Lottery Heritage Fund, we look forward to working with a wide range of heritage organisations and our partners AMA and Creative United to create a flexible programme of support that will embed long-term resilience and learning across the heritage sector for years to come.”*

**Michelle Wright, CEO and Founder of Cause4**

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*“The coronavirus pandemic has brought with it unprecedented uncertainty and challenges, but we are committed to helping the heritage community weather the impact and recover in the future. With our investment in the Business Support Programme and in Cause4’s England-wide initiative, we aim to ensure that the heritage sector is robust and resilient and will be well equipped in the face of future challenges.”*

**Eilish McGuinness, Executive Director, Business Delivery at The National Lottery Heritage Fund**

