

Culture Radar

*Supporting Strategic
Change in the Arts*

A Sustainable Future for Heritage & Culture in Moray

Jeanie Scott, Andrew Ormston, Michael Trainor
Culture Radar
January 2020

This project is part-financed by the Scottish Government and the European Union 2014-2020 LEADER fund



Acknowledgements

Many thanks to the individuals, groups, agencies and organisations who kindly contributed their time and expertise in consultations and research for this project.

Contact:

Jeanie Scott

Director

Culture Radar

Edinburgh, Manchester

info@cultureradar.org

jeanie@cultureradar.org

January 2020

© Culture Radar Ltd, 2020

Culture Radar Ltd is registered in Scotland, SC618028

Contents

Executive Summary.....	3
Introduction and methodology.....	10
Key Research and Consultation Findings	11
Strengths and opportunities.....	11
Funders and partner priorities and best practice.....	11
Challenges and sector needs	12
A vision for Moray.....	14
A strategic framework for Moray’s heritage	15
Strategic Themes	16
Best practice	25
Operating models	33
Criteria	33
Timing	33
Options	34
Conclusion and Recommendations	42
Route Map 2020 - 2022	43

Executive Summary

Introduction

This report presents proposals for long-term sustainability for Moray's heritage and traditional culture as the final step of a two-year National Lottery Heritage Funded project, Discover Moray's Great Places. It draws on findings from the Great Places project, as well as new research and consultations focused around heritage income and sustainability.

While this report concludes Discover Moray's Great Places project, it has been developed – purposefully and practically – as a next step for the sector to continue its onward journey towards long term change and sustainability.

Culture Radar's brief was to:

- Review current approaches to traditional and innovative fundraising and income generation within the heritage and traditional culture sector in Moray, and to explore opportunities to strengthen and sustain this over the long term.
- Explore the potential, and options for a strategic operating model to support and develop regional heritage and culture for the long term.

The project ran from 27 September 2019 to 17 January 2020. Establishing a long-term vision and strategy focused to heritage and traditional culture has been the priority of this project.

Key Research and Consultation Findings

Drawing on consultations with stakeholders across the region core strengths for the heritage sector in Moray emerged. It has a wealth of heritage collections, buildings, intangible, natural and industrial heritage assets. It is volunteer-led by passionate and entrepreneurial people who are sustaining their heritage at different levels. Consultations revealed a strong desire for Moray's heritage to be represented better at strategic level regionally, and for greater collaboration and networking across the sector. There was also evidence of strong community engagement and empowerment around heritage in Moray - from volunteering, to knowledge sharing and a high level of community ownership.

Several opportunities for Moray's heritage emerged during desk research that could be utilised long term to increase resilience and sustainability. The enthusiasm built around the Moray Speyside Tourism BID will come to fruition when it is constituted in April 2020. The confirmed Moray Growth Deal will realise plans for an Elgin Cultural Quarter including heritage capital, culture and creative industries investment. Scottish-government supported rural regeneration and place-making initiatives will continue to be relevant in Moray.

There are opportunities here for the heritage sector to make a strong case and play a positive role in Moray's economic development. There are also opportunities for it to refresh or build new partnerships and networks regionally and nationally, and to tap into publicly funded sector and third sector support to grow the skills and capacity it needs to do this.

Funders and partner priorities and best practice

At a regional and national level there are key regeneration priorities that emerge from the research that are relevant for Moray's heritage sustainability – either because it can benefit from working towards the same priorities, or it can support delivery of them:

To attract and retain families, young people and professionals to the region to contribute to economic growth, Moray needs to market the benefits of living and working in a culturally and rich place with opportunities to engage that positively impact on health and wellbeing.

Attracting new and more visitors to Moray is also a key growth target of Moray's tourism industry (in which heritage plays a part). National trends in devolved decision-making and rural regeneration projects with communities at their heart are reflected in Moray's highly engaged heritage volunteers and volunteer-led heritage projects.

The Scottish Government's National Performance Framework includes indicators to increase cultural engagement, improve the state of Scotland's historical sites and improve Scotland's reputation internationally. And leadership, diversity, resilience, digital solutions, and of course protecting and developing heritage assets for future generations, are key priorities for national heritage agencies. These are best practice targets which Moray's heritage could play an active part in delivering.

This is the time for Moray's heritage sector to be building and strengthening links between its activities and these funder priorities in order to demonstrate relevance and lever investment for the long term.

Challenges and sector needs

Moray's heritage sector does of course face challenges, particularly as public and private funding continues to be under pressure through austerity. Mirroring the picture of many rural heritage communities across the UK, Moray's is largely volunteer-led, surviving on short term project funding, with a high proportion of retirement age volunteers.

Developing initiatives and partnership to attract younger volunteers, improve the governance of Moray's heritage organisations, and grow fundraising and business and finance skills are some of the key needs consultees highlighted through the project.

This largely independent sector is also fragmented, geographically and by heritage type, which means no shared vision around heritage has developed over time, and there has been no consistent evidence gathering of the contribution heritage and traditional culture has made to the region.

Perhaps most challenging for long-term sustainability is that currently heritage is not reflected in Moray's economic development strategy, and is not considered as having a role in Moray's future growth. In addition, Moray Council has announced the closure of its Museum Service from April 2020.

There is therefore an urgent need for the heritage community to come together in support of a shared vision and purpose - and create a new, credible point of contact and negotiation for funders and policy makers to partner with.

A vision for Moray

Reflecting on the findings and regional priorities for Moray, a working interim vision and mission for Moray's heritage community were developed:

Vision: Heritage realises its full potential for a stronger Moray.

Mission: Moray's national and international reputation is thriving and secure as a world class destination for heritage and traditional culture, where everyone can enjoy and learn from its rich past.

Aims that reflect long-term ambitions for the sector were developed where heritage and traditional culture in Moray will:

- Be valued as an important part of Moray's economic and cultural development
- Confidently demonstrate its value and impact in economic, social and cultural terms to investors, funders and policy makers
- Support growth, employment and careers and learning in Moray
- Attract investment and partnerships for Moray-wide heritage projects
- Celebrate its assets, with a reputation for best practice in heritage management
- Be respected as a leader in volunteer and community-led rural regeneration
- Engage more people from diverse backgrounds and age groups with Moray's traditions, history and culture.

These are distilled into a Strategic Framework for Moray's Heritage consisting of four themes aligned to heritage sector strengths and regional priorities (Enterprise, Tourism, Education & Lifelong Learning, Communities) and four best practice priorities supported by sector agencies (Leadership, Heritage Management & Engagement, Collaboration, Digital).

Further detail and illustrative case studies for each of the Strategic Themes and Best Practice priorities are included in the main report, but can be summarised as:

Enterprise: Most of Moray's heritage organisations already operate as independent charities or businesses, led by volunteers. With support they can increase or adopt new entrepreneurial approaches to increase revenue, resilience and capacity and contribute to the region's economic development. Long term, Moray's heritage will contribute to enterprise through:

- Growing heritage businesses, income and investment
- Developing skills and diversifying volunteers
- Long term creation of professional careers.

Tourism: A successful Moray Speyside Tourism BID will deliver on its ambition to double tourism spend in Moray by 2025. Building a relationship with the new Moray Speyside Tourism BID will bring a number of 'quick wins' for opted in heritage businesses that will build confidence across the sector and help develop inspirational and authentic visitor experiences. Long term, Moray's heritage will contribute to tourism targets by contributing to:

- Regional income by attracting more UK and international visitors
- Seasonal and event-related employment
- Moray's international reputation as a world class tourism destination.

Education & Lifelong Learning: Higher education institutions in Moray seek to attract and retain young people to the region, and to 'reach beyond the campus' to augment the learning experience of their students. Moray's heritage can contribute to, and benefit from engagement with education and lifelong learning through:

- Partnerships and networks that drive knowledge exchange and innovation
- Engagement with young people and diverse audiences
- New income streams around education, learning and health
- Opportunities for professional and leadership development for heritage individuals.

Communities: Participation in culture and heritage activities is known to bring benefits for community cohesion and prosperity, as well as benefits for the health, wellbeing and quality of life of citizens. In addition, heritage assets, both tangible and intangible, can powerfully define the identity of a community strengthening civic pride and community decision-making. Place-making research recommends a ten-year timeframe is needed for lasting change. Long term, Moray's heritage will support positive place-making for its communities by:

- Playing an active role in rural regeneration
- Contributing to Moray being an attractive place to live, work and raise families
- Creating opportunities for Moray's citizens to engage with and enjoy their local heritage.

Leadership: Long term, Moray's heritage sector can demonstrate leadership:

- At a regional level through a sector-wide operating model
- Across heritage organisations and groups in Moray through improved board governance.
- Among the heritage workforce in Moray, leadership can be developed through initiatives to develop young leaders and volunteers.

Heritage Management & Engagement: Important decisions about the preservation, management, development and interpretation of Moray's heritage and collections should be informed by the best professional evidence, advice and support to help achieve industry standards.

Collaboration & Partnership: Being a 'good partner' is an essential ingredient of private and public sector working today. Some public sector agencies (such as Museums Galleries Scotland) have a strategic obligation to work in partnership with heritage stakeholders to facilitate change and development. Independent funders or investors don't have that obligation – they will look to (and choose to) fund projects and organisations that understand how to be a good partner. For Moray, this is even more important. For many heritage and culture funders, the risks associated with investment decisions can be mitigated if a local Council's culture or museums service is involved. With Moray Council closing its Museums Service, that potential stabilising factor for funders will be gone. Moray's heritage community therefore must step forward to demonstrate and model best practice in collaborative working if it is to be successful in securing long term strategic support.

Digital: Many policy and sector agencies are interested in supporting digital and new technology to solve contemporary heritage and traditional culture challenges. Historic Environment Scotland sets out its understanding of digital best practice as a means of:

- Improving heritage understanding and interpretation
- Increasing accessibility to heritage
- Ensuring the long-term preservation of heritage assets.

For organisations wishing to increase sustainability, these might be augmented with:

- Opportunities to monetise heritage-related intellectual property
- Exploring opportunities for digital collaboration for business development, market research and audience development.

Operating models

There is currently no one organisation representing or making a sector-wide case for investment in heritage in Moray, and no one place for heritage organisations to access support. The fragmented nature of the sector was also identified as a critical barrier to it accessing strategic funds, support and partnerships for long-term sustainability.

Working with the Discover Moray's Great Places Steering Group, potential operating structures were assessed and prioritised against the three key criteria:

- Strong governance
- Capacity for income generation, fundraising and tax incentives
- Adaptability

With the Council's Museums Service due to close and the Council's last remaining heritage asset (The Falconer Museum) scheduled for temporary closure until a solution for its future is found, this change in the heritage ecology in Moray should to be taken into consideration in recommendations around operating models. While independent solutions are being explored for the Falconer, it was prudent to include options that could accommodate a capital asset whilst also meeting the key criteria.

Following a longlist, three options were therefore assessed in detail with the Discover Moray's Great Places Steering Group:

- Charitable Trust
- Scottish Charitable Incorporated Organisation
- Membership organisation

Key features, advantages and disadvantages are outlined in the report. The recommendations can be summarised as:

- *Charitable Trust*: If there is a need to accommodate a capital asset, a trust structure could be the preferred option in terms of giving confidence to funders and investors of robust governance. If the capital asset is to include a museum with its collection it will be important to ensure: appropriate due diligence relating to the asset and the transfer; that adequate professional heritage skills and expertise are recruited to its board as well as to the operational staff; and that adequate self-generating assets are included in the transfer to contribute to sustainability. These will be essential to ensure best practice and avoid burdening the new Trust or owner with excess liabilities (and therefore drawing attention away from the overall strategic purpose of the organisation i.e. the sustainability of Moray's broad heritage long term).
- *Scottish Charitable Incorporated Organisation*: This is a popular, tried and tested structure that has been adopted by many organisations with a similar regional or heritage sector

purpose. The flexibility it offers does not impose heavy administrative burdens on a new organisation, whilst still being regulated as a charity and giving access to broad charitable benefits. SCIOs include potential for (paid) membership which can help to develop strong, dedicated, pro-active communities focused around a single purpose. While SCIOs can accommodate capital assets, the nature of the asset should be considered in relation to the organisation's proposed administration and operational capacity (e.g. in the case of the transfer in of a museum with a collection). Funders will seek confidence that the structure is robust enough to execute appropriate governance, employ or retain suitably qualified professionals to manage the heritage and raise adequate funds and investment to resource it and deliver its broader brief. If no capital asset is to be included, and the model's main purpose is delivery of a business plan and strategic activity, a SCIO could be an appropriate and convenient model for Moray's small, largely volunteer-led sector to grow and adapt.

- *Membership Organisation:* While membership organisations are also tried and tested across the culture and heritage sector, and would bring a strong advocacy and lobbying angle, there is currently a lack of scale and reach in the heritage 'marketplace' in Moray to realistically support or sustain a fully formalised membership model, without public or private funding (which some legal structures would not be eligible for).

How heritage and culture sectors in other parts of the UK have interpreted these models, and shaped them to their own unique environments and contexts, are illustrated through case studies in the report.

Conclusion and Recommendations

Conclusion

There is a demonstrable need for an over-arching operating model to present a shared and inclusive vision for the heritage community in Moray. This is evidenced by urgent needs emerging from the consultation:

- With the closure of the Moray Council Museums Service there will be an urgent need for Moray's heritage community to mobilise and take steps to resolve barriers to sustainability
- With no cohesive voice making a case around heritage investment or partnership, there is a danger current opportunities will be missed for heritage in the short term e.g. Moray Growth Deal, Elgin Cultural Quarter, Moray Speyside Tourism BID
- There is an urgent need to assess the actual level of investment and professional expertise needed to preserve, manage and develop Moray's heritage at a regional level, and help to mitigate risks for its heritage assets
- The heritage community urgently needs to build capacity in skills, and partnership working
- The diversity of the largely volunteer heritage workforce in Moray must shift for managed succession-planning, resilience and to enable change.

Outcome

- While there is no one representative support organisation for heritage in Moray, simply putting a new structure in place will not achieve sustainability
- Having a clear vision and strategy will move the sector towards deciding on a suitable operating structure tailored to Moray's needs.

Recommendations

- **Strategic recognition for heritage:** The current and potential contribution that heritage does and will make to a successful Moray must be considered by the Moray Economic Partnership, with heritage 'written in' to future iterations of the Moray Economic Strategy.
- **Groundwork:** In the short term, essential development work is needed to bridge the gap between where the community currently is in terms of skills, capacity and partnership working, and where it needs to be to confidently select an appropriate operating model.
- **Partnership development:** It is essential Moray's heritage community is at the heart of this change process – a first step will be to establish a skilled, expert Forum to collaborate with partners and stakeholders in the execution of a Route Map for change (see below).
- **Dialogue with Moray Council:** Although the Council is closing its Museum Service from April 2020, dialogue needs to be maintained between the Forum and its development of a new operating model, and the Council while it conducts its own feasibility and transition planning for the Falconer Museum.
- **Delivery of a Route Map for change:** A step-by-step Route Map has been designed to help the heritage community begin to bridge the gaps identified and move forwards. Key milestones and detailed activities for the Route Map are included in the report. It is intended the Route Map should be delivered between 2020 and 2022 achieving change, preparing the sector for a new operating model, and delivering the following development Milestones:
 1. Establish Moray Heritage Forum
 2. National Lottery Heritage Fund Application
 3. Strategic Framework Development Project
 4. Research Investment Partnerships
 5. Operating Model

13 January 2020

Introduction and methodology

The Discover Moray's Great Places Coast & Country partnership (August 2018 - March 2020) was funded by National Lottery Heritage Fund and supported by a broad partnership of regional and sector stakeholders.

In September 2019 Moray Council invited (on behalf of the Moray Economic Partnership and its theme group Tourism & Culture) a final piece of consultancy through the Discover Moray's Great Places project to explore new approaches to income generation for Moray's heritage and culture sector, and options for a new sustainable operating model. Culture Radar was appointed to deliver this work.

Culture Radar's brief was to:

- Review current approaches to traditional and innovative fundraising and income generation within the heritage and traditional culture sector in Moray, and to explore opportunities to strengthen and sustain this over the long term.
- Explore the potential, and options for a strategic operating model to support and develop regional heritage and culture for the long term.

The project ran from 27 September 2019 to 17 January 2020 comprising: desk research, sector and stakeholder consultations, public presentations, option appraisal, interim and final reporting. A full list of references and participants in the consultations can be found in the Appendices which are published as an accompanying document.

Establishing a long-term vision and strategy focused to heritage and traditional culture has been the priority of this project. While Moray is home to many contemporary art, performance, film and creative organisations their business models, needs and audiences are generally different to those of heritage and traditional culture. We reflect UNESCO's definition of cultural, natural and intangible heritage¹ (within the context of Moray) and understand the following as the target benefactors of this project:

- Castles and historic houses (including National Trust, Historic Environment Scotland)
- Industrial heritage (including wool, textiles, food, whisky, transport, fishing, shipping)
- Monuments and landmarks
- Museums (with and without accreditation)
- Natural heritage (including nature reserves and wildlife)
- Public gardens
- Religious buildings and centres
- Traditional culture, festivals and events (including music, folk, games, crafts, food and drink, storytelling, song)

¹ [UNESCO Convention Concerning the Protection of the World Cultural and Natural Heritage, UNESCO Intangible Cultural Heritage](#)

Key Research and Consultation Findings

This section summarises key findings emerging from our research and consultations. A full exploration of the research and consultation findings can be found in the Appendices to this report.

Strengths and opportunities

Strengths

Drawing on consultations with stakeholders across the region core strengths for the heritage sector in Moray emerge. It has:

- A wealth of heritage collections, buildings, intangible, natural and industrial heritage assets
- A small, volunteer-led, passionate and entrepreneurial sector who are sustaining their heritage at different levels (just)
- Strong motivation emerging for Moray's heritage to be represented in regional strategic planning and conversations
- Evidence of strong community involvement, empowerment and collaboration - from volunteering, to knowledge sharing, to community ownership of heritage capital
- A strong desire for improved collaboration and networking across the sector to help heritage and traditional culture thrive.

Opportunities

From the desk research several opportunities emerge for Moray's heritage that could be utilised to increase resilience and sustainability in the short, medium and long term, including:

- Drawing on the opportunities and expertise that will be available through a newly constituted Moray Speyside Tourism BID following a public vote in January 2020
- The confirmed Scottish Government Growth Deal for Moray, plans for which include an Elgin Cultural Quarter including heritage capital, culture and creative industries investment
- Developing a strong case for place-making investment in Moray for economic development, stronger communities and rural regeneration
- Building on existing formal and informal networks to develop a volunteer-led approach to sector representation for heritage
- Refreshing and building new partnerships with key sector stakeholders to support heritage sustainability, including with enterprise and tourism, education and health agencies
- Increasing access to existing national and regional development support for sustainability
- Exploring investment and skills development for digital solutions to heritage challenges
- Establishing a link between heritage sector activities and regional investment priorities to diversify and extend potential income for the sector.

Funders and partner priorities and best practice

Priorities

At a national and regional level key regeneration priorities emerge from the research relevant to the long-term sustainability of Moray's heritage, including:

- The economic growth and development of Moray, including the attraction and retention of young people and professional expertise

- Collaboration and partnerships across public, private and third sector that positively impact on business and economic growth, but also social and cultural development, health and wellbeing
- Attracting new and more visitors to Moray with tourism highlighted as a key growth industry
- Investment in place-making, rural regeneration, community empowerment and decision-making
- The Scottish Government's National Performance Framework includes indicators to increase cultural engagement, improve the state of Scotland's historical sites and improve Scotland's reputation.

Best practice

Across heritage policy agencies and funders, there is focus on supporting and increasing best practice, particularly in relation to:

- Leadership and collaboration, particularly around leveraging strategic investment
- The diversity of boards, staff and volunteers as well as the visitors to and audiences for heritage (with education and tourism identified as key targets)
- Developing the skills and capacity in the sector to support sustainability (including business, digital and fundraising skills)
- Protecting and developing heritage assets for future generations
- The application, development and implementation of new technology and digital solutions to improve heritage understanding, interpretation and accessibility.

Challenges and sector needs

A key strategic challenge is that, currently, heritage is not reflected in, or considered a strong part of Moray's future economic development. This is partly due to a heavily fragmented heritage ecology, with a high reliance on volunteering and short-term project funding.

At a strategic level, the sector needs to:

- Come together behind a shared long-term vision and purpose for heritage
- Create a credible point of contact and negotiation for funders and policy makers that will successfully lever investment, partnerships and deliver economic impact
- Convincingly evidence the impact that heritage and traditional culture makes, and can make in the future, to economic development and rural regeneration
- Implement long term, sector-wide change.

At the level of Moray's heritage organisations, there is a need for greater diversity, skills and some behavioural change if the sector is to become more resilient. Key recommendations from consultation stakeholders include:

- Developing new, young volunteer and leadership initiatives to drive change, best practice and begin to establish the conditions for professional heritage careers in Moray
- Improving the governance of Moray's heritage organisations, and grow fundraising and business and finance skills

- Creating a realistic and sustainable support solution for what is a complex ecology of organisation types, structures, sizes and business models (in a climate of reduced public funding)
- Increasing collaboration across the sector, and with key sector stakeholders to broaden audiences for, and participation with heritage
- Attracting younger volunteers to support succession planning, knowledge transfer and bring much-needed skills and new energy
- Developing greater communication and networking across the sector for peer learning and support.

A vision for Moray

A real passion for and dedication to heritage emerged from consultations. As is the case with heritage UK-wide however, Moray's heritage is predominantly project-funded and volunteer-led, which means this passion can be directed towards individual or short-term goals.

The sector's long-term sustainability and success will depend upon it presenting a coherent, shared, long-term vision and case for investment that is attractive to funders and partners.

There is an urgent need for the sector to work together to demonstrate its contribution to the local economy now, and its shared aspirations for its future if it is to be considered and written into future regional economic and rural strategies and investment streams.

Drawing on identified strengths and opportunities, and reflecting on regional priorities for Moray, a working interim vision, mission and aims for change are presented below. It is essential the sector takes ownership of developing and refining these in the short term.

Vision:

Heritage realises its full potential for a stronger Moray.

Mission:

Moray's national and international reputation is thriving and secure as a world class destination for heritage and traditional culture, where everyone can enjoy and learn from its rich past.

Priorities:

Strategic Themes

Enterprise
Tourism
Education & Learning
Communities

Best Practice

Leadership
Heritage Management & Engagement
Collaboration
Digital

Aims:

Long term, Moray's heritage and traditional culture will:

- Be valued as an important part of Moray's economic and cultural development
- Confidently demonstrate its value and impact in economic, social and cultural terms to investors, funders and policy makers
- Support growth, employment, careers and learning in Moray
- Attract investment and partnerships for Moray-wide heritage projects
- Celebrate its assets, with a reputation for best practice in heritage management
- Be respected as a leader in volunteer and community-led rural regeneration
- Engage more people from diverse backgrounds and age groups with Moray's traditions, history and culture.

A strategic framework for Moray's heritage

To move forward, Moray's heritage sector needs a strategic framework to align its strengths with regional and sector priorities and make a credible case for partnership and investment that funders and policy makers will understand.

A framework helps to break down a long-term vision into a mid-term delivery goals. These can be used to guide a sector through change and assist with adopting new ways of working and planning.

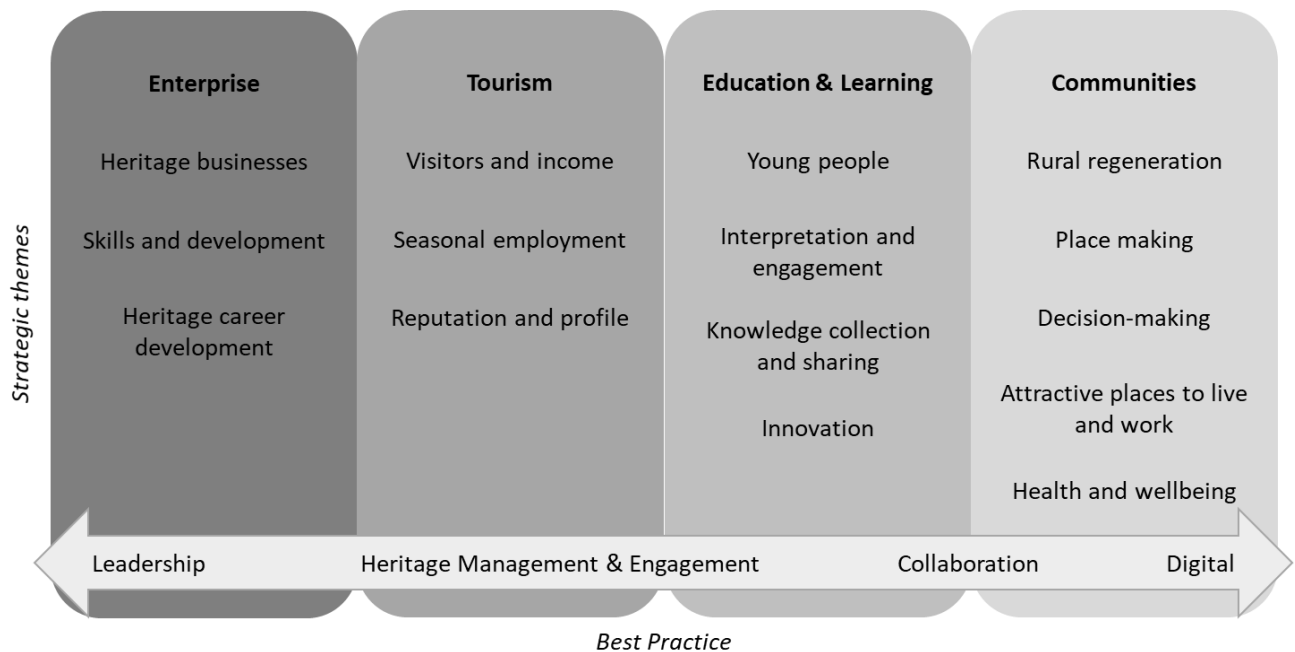
A strategic framework is proposed for Moray as following, consisting of:

Four strategic themes:

1. Enterprise
2. Tourism
3. Education & Lifelong Learning
4. Communities

Four priorities for best practice:

1. Leadership
2. Heritage Management & Engagement
3. Collaboration
4. Digital



Moray Strategy Heritage Framework, January 2020

The framework allows for interpretation and adaptation by the sector as contexts change over time, and as new opportunities emerge and best practice evolves.

The next section of this report explores each element of the framework in turn, setting out potential actions, outcomes, potential funders and partners, and short case studies relevant to each.

Strategic Themes

Theme 1: Enterprise

Most of Moray's heritage organisations already operate as independent charities or businesses, led by volunteers. With support they can increase or adopt new entrepreneurial approaches to build revenue, resilience and capacity and contribute to the region's economic development. Long term, Moray's heritage will contribute to enterprise through:

- Growing heritage businesses, income and investment
- Developing skills and diversifying volunteers
- Long term creation of professional careers

Actions	Outcomes
<ul style="list-style-type: none"> • <i>New heritage operating model is constructively engaged with economic development planning on behalf of heritage community in Moray.</i> • <i>Fundraising and regional investment projects to support development of heritage assets and facilities across Moray</i> 	<p>Heritage is valued as a contributor to Moray's economic and rural development – it is attracting investment, supporting employment and communities</p>
<ul style="list-style-type: none"> • <i>Sharing of business plans to assess opportunities for shared marketing, programme and collective fundraising</i> • <i>Cross sector partnerships developed with support from regional agencies to explore new heritage product development and merchandising for income generation</i> • <i>Sector collaboration and partnerships secure economies of scale and improved terms e.g. shared purchasing of key services, training, stock and supplies</i> 	<p>Moray's heritage organisations are more resilient – and demonstrate increased revenue from sustainable business models, business innovation and collaborative practices</p>
<ul style="list-style-type: none"> • <i>Partnerships with regional and third-sector agencies increase access to, and take up of, training and advice for heritage business planning, business model innovation and skills (e.g. business development, finance, fundraising, digital)</i> 	<p>More of Moray's heritage workforce demonstrate the necessary skills to sustain, protect and develop heritage assets</p>
<ul style="list-style-type: none"> • <i>Coordinated and proactive heritage sector collaboration with existing regional arts and culture events and tourism initiatives</i> 	<p>Increased income and more diverse audiences generated for heritage across Moray</p>

Potential enterprise supporters, funders, partners include:

Highlands and Islands Enterprise
Business Gateway
Architectural Heritage Fund
Regeneration Capital Grant Fund
Institute of Fundraising

Scottish Rural Development Programme
The Prince's Countryside Fund
National Lottery Heritage Fund
Historic Environment Scotland
Heritage Trust Network Scotland

Case Study

British Textile Biennial, Lancashire, 2019

The first UK Textile Biennial took place in 2019 stretched across 10 venues in Lancashire. It drew on the region's unique industrial heritage to deliver a month-long festival of public events and parades, workshops, exhibitions, community and schools projects to provide contemporary reflections on an industry rooted in the region's past.

The programme engaged a diverse demographic. It saw local heritage organisations involved in mutually beneficial partnerships with a broad range of stakeholders, and drew funding and support from National Lottery Heritage Fund, Arts Council England, Lancashire Council and the Canal & River Trust.

Outcomes included:

- More and new income streams for Lancashire's heritage and businesses
- Networking and collaboration across industry, manufacturing, education, heritage and communities
- Introduced varied textile-related careers to young audiences
- Raised the profile, reputation and identity of Lancashire as a home of traditional and contemporary industry.

www.britishtextilebiennial.co.uk

Theme 2: Tourism

Short term, building a relationship with the new Moray Speyside Tourism BID will bring a number of ‘quick wins’ for opted in heritage businesses that will build confidence across the sector, and help develop inspirational and authentic visitor experiences. Benefits include: a secure platform for cross-sector collaboration and partnership working; joint marketing and promotion; and audience and visitor development initiatives. Long term, Moray’s heritage will contribute to tourism targets by contributing to:

- Regional income by attracting more UK and international visitors
- Seasonal and event-related employment
- Moray’s international reputation as a world class heritage tourism destination

Actions	Outcomes
<ul style="list-style-type: none"> • <i>Access coordinated export marketing and promotion of Moray’s heritage via Moray Speyside Tourism</i> • <i>Partnership with local businesses to distribute Discover Moray’s Great Places marketing collateral</i> • <i>Coordination of up-to-date heritage opportunities fed into region-wide events calendar and development of extended visitor season (e.g. winter festivals) integrating heritage with the strong Moray tourism offer</i> 	<p>Moray’s heritage sector is welcoming more visitors from across the UK and internationally, increasing tourism annual spend</p>
<ul style="list-style-type: none"> • <i>Support via Moray Speyside Tourism to increase uptake from heritage organisations in tourism and visitor engagement training</i> • <i>Coordinated support for Moray’s heritage organisations to be represented in regional marketing initiatives</i> 	<p>Moray’s heritage has built a reputation for delivering high quality and best practice visitor engagement experiences that support responsible tourism and local employment opportunities</p>
<ul style="list-style-type: none"> • <i>Partnerships fostered between Moray’s heritage sector and Moray’s food & drink, music, performance and contemporary arts sectors to augment visitor experiences and support responsible tourism</i> 	<p>More visitors to Moray are enjoying its heritage offer year-round, supporting regional growth and employment</p>
<ul style="list-style-type: none"> • <i>Partnerships with local higher and further education institutions offer related (tourism, hospitality, events) courses to host student placement and projects of mutual benefit</i> 	<p>More young people are engaged with and contributing to Moray’s heritage development</p>

Potential tourism supporters, funders, partners include:

Moray Speyside Tourism BID

Visit Scotland

Visit Britain

Historic Houses

Scottish Council for Development and Industry

Highland and Islands Enterprise

Glasgow School of Art (Future Heritage Programme)

Case study

Tren Ecuador, 2016 World Responsible Tourism Awards

For a small country, Ecuador has a high proportion of protected natural heritage and biodiversity. In recognition of this, its government-owned train line, Tren Ecuador, developed what its calls 'Fair Train Tourism' where communities living and working along its main railway line are seen to be as important as the journey and its passengers.

Tren Ecuador has successfully turned luxury train travel on its head and, rather than just cocooning its travelers in luxury on the train, it still provides luxurious carriages and superb service, but takes passengers off the train to eat and stay in locally run businesses and hotels near its main station stops. It also works in partnership with local cultural and heritage organisations to devise a programme of cultural heritage stops along the route for its passengers to take part in seasonal activities, traditional events and festivals.

This responsible tourism business model now sustains 5,000 livelihoods for people living in remote rural communities along the tracks, with associated businesses fully licensed as Tren Ecuador partners and receiving technical support, best-practice training - and all-important business contracts based on fair-trade principles.

www.trenecuador.com

Theme 3: Education & Lifelong Learning

Higher education institutions in Moray seek to attract and retain young people to the region, and to 'reach beyond the campus' to augment the learning experience of their students - which Moray's heritage sector can support. In addition, heritage-based partnerships with schools, continuing education, health and social care can contribute positively to Moray's learning and wellbeing. Long term, Moray's heritage can contribute to, and benefit from engagement with education and lifelong learning through:

- Partnerships and networks that drive knowledge exchange and innovation
- Engagement with young people and diverse audiences
- New income streams around education, learning and health
- Opportunities for professional and leadership development for heritage individuals
- Educational partnerships that support heritage skills development

Actions	Outcomes
<ul style="list-style-type: none"> • <i>Coordinated development of:</i> <ul style="list-style-type: none"> • <i>Partnerships between specialist academic departments and existing heritage assets for knowledge exchange and innovation</i> • <i>Independent heritage education offer for schools, adult learning and social care settings</i> 	<p>More people of all ages and backgrounds are engaging with and learning from Moray's rich and diverse heritage</p>
<ul style="list-style-type: none"> • <i>Education research partnerships aligned and developed to help document, comment on and preserve heritage assets</i> • <i>Feasibility studies to explore commercial partnerships between relevant education department and heritage businesses for new income streams</i> 	<p>More investment and knowledge-exchange partnerships with education and learning institutions are supporting growth and innovation in Moray's heritage sector</p>
<ul style="list-style-type: none"> • <i>Learning-based partnership projects to pilot digital innovations and skills development in heritage settings for better interpretation, engagement, and preservation</i> 	<p>Visitors to Moray's heritage sites and events are recording high satisfaction levels from best practice heritage interpretation and learning experiences</p>
<ul style="list-style-type: none"> • <i>Development of heritage masterclass series, mentoring and peer learning networks for professional development and support of heritage employees and volunteers</i> 	<p>More of Moray's heritage workforce and volunteers are engaged in development opportunities that increase resilience and sector sustainability</p>

Potential education and lifelong learning supporters, funders, partners include:

- | | |
|---|---|
| Group for Education in Museums | Arts & Humanities Research Council |
| Moray Council (Education Service; Health) | Aberdeen University – Elphinstone Institute |
| University of the Highlands & Islands | Heritage Funding Directory |
| Glasgow School of Art | |

Case Studies

Heritage Horizons Traineeship Programme:

Museums Galleries Scotland's HLF Skills for the Future funded *Heritage Horizons Programme* provided one-year traineeships in museums across Scotland. Programme recruited 100% non-graduates and people without extensive voluntary experience in the sector to open-up and diversify the workforce. The programme aims to equip trainees with 'the combination of a qualification (SVQ3 Museums and Galleries Studies) and the confidence of work-readiness on completion'.

www.museumsgalleriesscotland.org.uk

Glasgow School of Arts & Johnstons of Elgin:

In 2017 GSA worked with Johnstons of Elgin on an innovation design project centered on the company's iconic heritage fabrics. The School delved deep into the company's history then worked with its fabrics to experiment with new applications of the fabrics, resulting in a range of shoe prototypes perfectly show-casing the brand.

Students, staff and researchers at GSA's have worked in similar ways with other Moray heritage organisations including Knockando Woollen Mill and the Falconer Museum.

GSA will launch a new student programme, Heritage Futures, in 2020 from its Altyres Campus in Moray, alongside its MSc in Heritage Visualisation.

[Glasgow School of Art Winter School Projects, 2019](#)

Historic Environment Scotland – Education visits:

HES offers subsidised educational visits to qualifying groups to access Scotland's heritage and bring history to life.

Qualifying groups for younger people include:

Nursery, primary and secondary school groups; after school clubs; Scouts and Guides; youth groups and skills/work programmes on themes related to HES work (e.g. tourism, hospitality, traditional skills); support groups for special learning needs or disabilities; Young Archaeologists' Club.

Student and adult qualifying groups include:

Universities or colleges studying relevant courses; adult learner groups from local authority lifelong learning courses or the University of the Third Age; teachers and education professionals participating in continuing professional development; adults with additional support or special learning needs or disabilities; community education groups involved in youth work, support services; social inclusion programmes and skills/work programmes related to the historic environment.

For those organising education visits, the programme provides a one-stop online booking process, and easy access to historic sites that support teachers, organisers or carers in providing a range of experiences that support learning in interesting and relevant settings.

Centralised and coordinated funding, marketing and management of the visit programme also alleviates burdens on individual sites to organise or develop their own.

www.historicenvironment.scot

Theme 4: Communities

Participation in culture and heritage activities is known to bring benefits for community cohesion and prosperity, as well as benefits for the health, wellbeing and quality of life for citizens. In addition, heritage assets, both tangible and intangible, can powerfully define the identity of a community strengthening civic pride and community decision-making.

Changing cultures and addressing complex issues that have developed over decades, however, takes time. Place-making research recommends a ten-year timeframe is needed for lasting change. Long term, Moray’s heritage will support positive place-making for its communities by:

- Playing an active role in rural regeneration
- Contributing to Moray being an attractive place to live, work and raise families
- Creating opportunities for Moray’s citizens to engage with and enjoy their local heritage

Actions	Outcomes
<ul style="list-style-type: none"> • <i>Delivery of strong community-focused partnership projects that support rural and social priorities in Moray</i> 	<p>The heritage sector is a recognised partner in and contributor to Moray’s rural and cultural regeneration</p>
<ul style="list-style-type: none"> • <i>Coordinated relationship-building with funders and Moray’s business sector levers investment and sponsorship for mutual benefit (e.g. a Moray Heritage Crowdfund pilot)</i> 	<p>The sector is making a credible case and attracting investment for community, rural and place projects</p>
<ul style="list-style-type: none"> • <i>Monitoring and impact studies undertaken to evidence health and wellbeing benefits of community engagement with heritage</i> 	<p>Regional surveys indicate increased levels of civic pride, wellbeing and ‘belonging’ in Moray as a result of community heritage initiatives</p>
<ul style="list-style-type: none"> • <i>Initiatives to support access to and shared learning around best practice in community groups (e.g. governance, processes, community project delivery, partnership working, peer support)</i> 	<p>Moray heritage development trusts and groups have a reputation for best practice in community empowerment and engagement</p>
<ul style="list-style-type: none"> • <i>Coordinated promotion of broad year-round heritage event programme to increase community participation and engagement</i> • <i>Targeted promotion of accessible opportunities via libraries and community groups, health and social care settings</i> 	<p>Community participation is increased and rural social isolation is reduced through better communication of heritage-focused opportunities</p>
<ul style="list-style-type: none"> • <i>Investment for community-led and inter-generational heritage activities that embed and develop local traditions</i> 	<p>More young people, families and diverse communities are benefitting from Moray’s heritage and traditional culture</p>

Potential Community supporters, funders, partners include:

Scottish Rural Development Fund
NHS Grampian & Moray
Social Investment Scotland
Scottish Government Aspiring Communities
Community shares Scotland
Cultural Impact Development Fund

CashBack for Communities
Regional and national trusts or foundations
(Gordon & Ena Baxter Foundation,
Robertson Trust, Beatrice Fund, Adam
Trust, Paul Hamlyn Foundation, Pilgrim
Trust, Barcapel, Garfield Weston, Hugh
Fraser, William Grant)

Case study

National Trust and Alzheimers Society

The National Trust in partnership with the Alzheimer's Society began an ambitious three-year project in 2019 to make its 500 historic and countryside sites dementia-friendly.

National Trust commissioned research showed that 7% (c.150,000) of National Trust supporters over the age of 65 (including volunteers, staff and members, may be living with the condition).

Its partnership with the Alzheimer's Society will see the biggest roll-out of its Dementia Friends' programme within a single heritage organisation, and will include:

- Upskilling 74,000 people who work and volunteer for the National Trust
- Improving accessibility of sites for all visitors
- Improving internal policies and processes to support members of staff and volunteers who may be affected by the condition
- Hosting awareness-raising activities and making improvements for those living with the disease will also build the case for more dementia-friendly communities.

- It is the largest collaboration of its kind bringing heritage and dementia together – the two organisations joined forces to unlock some of the nation's best-loved history and heritage for millions of people affected by dementia.
- There are currently 850,000 people in the UK with dementia and Alzheimer's Society predict that those living with the disease will hit one million within three years.
- It will also see improvements at some of our places, from improved signage, facilities and modifications to materials used on paths and car parks. We'll also be developing dementia services (such as cafés, tours and social events), taking heritage to local care homes, hospitals, day centres and community groups.

Grounding a project in issues of real importance or relevance to an organisation's key audiences or community is more likely to be successful and draw support.

www.nationaltrust.org.uk

Case study

The Happy Museum Project looks at how museums can respond to the challenge of creating a more sustainable future, with a focus on communities and wellbeing. Over 40 museums across the UK are part of the project.

A 5-year research study with a small group of museums from 2015 – 2020 has been investigating the impact of wellbeing and sustainability on individual, organisational and community resilience - partly motivated by the need to make better use of museum resources in the face of reduced funding.

Projects included:

- **People:** Derby Museums exploring traditional ideas around volunteering by involving local communities in the design of fixtures and fittings of the Silk Mill during its refurbishment; Ceredigion Museum training young people in craft and enterprise skills and selling the results in the museum shop.
- **Space:** projects exploring the use of museum spaces to maximise occupancy. Bilston Craft Gallery trained museum staff to make outdoor play objects to create a new outdoor space for use by local schools and communities; London's Garden Museum transformed adjacent outdoor space into a growing area, and the museum worked with local schools and old people's groups on learning projects.
- **Recycling:** up-cycling and recycling were explored by Beaney House through its 'cultural apothecary' - a full-size replica of an old apothecary shop made from cardboard which issued 'cultural prescriptions' to visitors (involved over 100 volunteers and pupils from 4 local schools).

These projects all used an approach based on three principles:

1. Focus on what matters
2. Be an active citizen
3. Pursue mutual relationships.

These are useful founding principles for making change at a sector level as the importance of 'protecting heritage' on its own does not necessarily engage partners, attract investment, or create projects or new revenue streams.

Connecting Communities through Shared Values

Happy Museum has announced a new workshop for 2020 exploring how museums can work with values to address social polarisation and connect communities.

It is in recognition that most people care deeply for other people and the places where they live. When people hold more authentic perspectives of others' values they are more likely to report deeper connection to their communities, support action on social or environmental challenges, show greater motivation to becoming engaged in wider, collective actions, and feel higher wellbeing.

Museums and cultural organisations are among the most important places where the values of compassion, connection and community can be expressed and strengthened. The Happy Museum workshop will explore how museums might cultivate these values, create opportunities for people to express and share them with others, and how this might help address social polarisation - helping communities come together for the common good.

www.happymuseumproject.org

Best practice

Partners and funders are interested in investing in, supporting and developing best practice in the organisations they fund. Demonstrating best practice, or the aspiration to achieve it, is important to attract funding and partnerships. Best practice plays a cross-cutting role in Moray’s strategic framework focusing on leadership, heritage management, collaboration and digital.

Best practice 1: Leadership

Leadership happens at many levels. Long term, Moray’s heritage sector can demonstrate leadership:

- At a regional level through a sector-wide operating model to lead strategic conversations with funders and policy makers, play a critical role in attracting investment, advocating for change and raising awareness of heritage across Moray and beyond
- Across heritage organisations and groups in Moray through improved board governance. Having the right people, skills and expertise on boards will mean stronger organisations, more informed decision-making, reduce conflicts of interest and increase credibility with funders and partners
- Among the heritage workforce in Moray, leadership can be developed through: initiatives to develop young leaders who will steward best practice and lead change over the long term; best practice volunteering initiatives, development and recruitment processes.

Actions	Outcomes
<ul style="list-style-type: none"> • <i>Establish independent operating model to lead change for Moray’s heritage sector, and engage in strategic partnerships regionally and nationally</i> 	<p>An independent operating model representing all of Moray’s heritage is leading change, attracting investment and contributing to regional growth through the deliver of a Moray Heritage Business Plan</p>
<ul style="list-style-type: none"> • <i>Agree and implement best practice governance standards for Moray’s heritage sector, with access to and incentives for board training and development</i> 	<p>Moray’s independent heritage organisations and groups have developed a reputation as exemplars of best practice in heritage management</p>
<ul style="list-style-type: none"> • <i>Establish initiatives to develop leadership across Moray’s heritage workforce, from young leaders to heritage professionals and volunteers</i> 	<p>Moray’s heritage is respected as a leader in youth, volunteer and community-led regeneration</p>

Potential Leadership supporters, funders, partners include:

Museums Galleries Scotland	Scottish Council for Voluntary Organisations
Historic Environment Scotland	Scotland’s Urban Regeneration Forum
National Lottery Heritage Fund	Scottish Community Heritage Alliance
Cultural Governance Alliance	Arts & Business Scotland
The Audience Agency	Impetus Trust
Clare Leadership	

Case Study

Heritage Volunteer Leader of the Year Awards

Recognising leadership is an effective way of demonstrating and developing best practice.

The Heritage Volunteering Group helps organisations and volunteer managers unlock the power of volunteering through collaboration and sharing best practice.

Its Volunteer Leader of the Year Awards celebrate the achievements of volunteers and recognises innovative and outstanding examples of volunteer leadership and management within the heritage sector.

"I was really honoured to be voted Heritage Volunteer Manager of the year 2018. The recognition made me feel really proud of what we have achieved across Leicestershire Heritage community. It also highlighted the vibrancy and passion younger volunteers and volunteers with learning disabilities can bring. I hope my work inspires people to consider making their volunteering opportunities more diverse and accessible as Heritage belongs to everyone, and everyone has something to contribute." Nicola Seike, Volunteer Coordinator for Leicestershire County Council Heritage Service, 2018

www.heritagevolunteeringgroup.org.uk

Case Study

New Voices: Fresh Perspectives

Positive discrimination on boards can make positive change happen.

Arts & Business Scotland (A&BS) is working in partnership with the William Grant Foundation to deliver *New Voices: Fresh Perspectives*, a recruitment programme to place young people on arts and heritage boards.

In 2019/20 it will recruit 12 young people (aged 18-30) in early stages of their careers and from a wide range of sectors, on to the boards of cultural charities. Participating individuals will undertake an intensive training programme on the roles and responsibilities of Board trustees, and will then be matched with arts and heritage sector organisations with a recognised need to change the dynamics of their current boards, address equality, inclusion or diversity.

As part of the programme, selected arts and heritage organisations will undergo a governance health-check to ascertain that they have the systems, processes and infrastructure in place to embrace the rationale and need for diversification.

www.aandbscotland.org.uk

Best practice 2: Heritage Management & Engagement

Important decisions about the preservation, management, development and interpretation of Moray's heritage and collections should be informed by the best professional evidence and advice. In a heavily volunteer-led sector it is important a new operating model facilitates access to available resources that help Moray's heritage groups and organisations achieve industry standards.

Actions	Outcomes
<ul style="list-style-type: none"> Establish a Moray heritage risk register to inform and prioritise advocacy, fundraising and marketing of its collections and heritage assets 	<p>More of Moray's valuable heritage assets and traditional culture is secured, restored, maintained and monitored to a high standard</p>
<ul style="list-style-type: none"> Establish monitoring standards for visitor feedback and satisfaction surveys across Moray's heritage 	<p>Moray's heritage and traditional culture is recognised and valued as delivering high quality visitor engagement experiences, to more people</p>
<ul style="list-style-type: none"> Signposting to digital and third-party resources, training and mentoring to increase access to professional heritage knowledge and expertise Professional masterclasses, mentoring and peer networks piloted to support sharing of curatorial, conservation and development expertise (working with national agencies and stakeholders, and neighbouring region heritage groups) 	<p>Moray's heritage workforce has retained, attracted and grown the skills and expertise to demonstrate best practise in heritage management and engagement</p>
<ul style="list-style-type: none"> Develop initiatives and volunteer recruitment processes that attract the expertise and required competencies to support best practice Volunteer training in community engagement and visitor care through sector and third-party agencies 	<p>Moray's heritage and traditional culture volunteers are respected nationally for 'best practice' in heritage management and engagement</p>
<ul style="list-style-type: none"> Establish professional, commercial and educational partnerships to improve presentation and interpretation of Moray's heritage assets 	<p>Heritage is presented authentically and accessibly increasing and broadening understanding of Moray's heritage treasures</p>

Potential Heritage Management & Engagement supporters, funders, partners include:

Museums Galleries Scotland	GEM: The voice for heritage learning
The Engine Shed (Historic Environment Scotland)	Heritage Crafts Association
Architectural Heritage Fund	The Heritage Alliance
National Lottery Heritage Fund	Association of Heritage Interpretation
tsiMORAY	Heritage Trust Network
Scottish Council for Voluntary Organisations	Scottish Community Heritage Alliance

Case Study

East of Scotland Museums Partnership

Running since 2004 ESMP has 40 active members including local authority museums and gallery services, university museums and independent trusts. ESMP aims to foster excellence and enhance museums for the public in the East of Scotland.

ESMP is committed to:

- Working in partnership with others to realise the full potential of its collections and people
- Sharing expertise and knowledge and promoting best practice
- Securing funding through developing joint funding proposals
- Highlighting the role of museums and galleries not just regionally, but also nationally and internationally.

Member museums have the opportunity to network, share information and provide support to other partners in an informal and friendly setting. They can also benefit from the knowledge of guest speakers and partners at ESMP member events, as well as behind the scenes visits to share best practice, resources and skills. ESMP also provides skills development activities and professional development opportunities.

With funding from MGS's Skills Development Fund ESMP provide a network to share best practice, opportunities for skills and knowledge development and facilitate collaborative projects.

www.museumsgalleriesscotland.org.uk

Case Study

Association for Heritage Interpretation (AHI) Awards

The biennial AHI Awards recognises and rewards best practice in heritage interpretation across the UK and Ireland. They are the only awards to recognise excellence in all types and sizes of heritage interpretation, whether held in museums, historic buildings, visitor centres or any type of outdoor location.

The awards:

- Celebrate heritage interpretation in all its forms
- Are a prestigious badge of recognition for winning and shortlisted entries
- Share, encourage and showcase good interpretive practice and the organisations responsible for it
- Publicise good interpretive practice and the organisations responsible for it through the media
- Provide interpretive evaluation to shortlisted entrants

The award categories include: Museums and Historic Properties and Sites; Visitor and Interpretation Centres; Volunteer and Community Projects; Events and Activities; and the AHI Award for Excellence in Interpretation.

Each award category is supported by business sponsors.

www.ahi.org.uk

Best practice 3: Collaboration & Partnership

Being a 'good partner' is an essential ingredient of private and public sector working today. For partnerships that need to attract (and sustain) investment and funding, it is a vital ingredient of success (particularly if it is hoped that the funding relationship will be long term).

Some key public sector agencies (such as Museums Galleries Scotland) have a strategic obligation and objective to work in partnership with its heritage stakeholders to facilitate sector development. Other independent funders or investors don't have that obligation – they will look to (and choose to) fund projects and organisations that understand how to be a good partner, and can demonstrate that understanding in applications, and in practice. Application guidelines for most funders (from National Lottery Heritage and Community Funds, to Esmée Fairbairn and many more) spell out the need to demonstrate partnership and coordinated approaches, particularly in relation community projects.

For Moray, this is even more important. For many heritage and culture funders, the risks associated with investment decisions may be mitigated if a local Council's culture or museums service involvement. With Moray Council closing its Museums Service from April 2020, that stabilising factor for Moray will be removed. Moray's heritage therefore must now step forward, with one voice, to demonstrate and model best practice in collaborative working if it is to be successful in securing long term strategic support.

Partnership working is defined as two or more groups coming together to achieve a common purpose. It is not necessarily a 50/50 division of power or responsibility but there is always some degree of spreading control or influence. They are often formed to address specific issues and may be short or long term.

Key principles of good partnership working:	Signs of poor partnership working:
<ul style="list-style-type: none">• Openness, trust and honesty• The right partners are involved, bringing the skills, expertise and influence needed to steward the project• Regular communication between partners• Agreeing shared goals and values at the outset – collective benefit, not self-interest• Clarity around responsibilities – to avoid conflicts, delays or failed projects• Time is taken to establish trust, joint methods of working• Regular review of partnership agreements to ensure values and aims are on track, and the right partners are still involved	<ul style="list-style-type: none">• Where partners have different values and priorities (leading to conflicts of interest)• Where no formal agreement or partnership agreement is in place to keep the partnership on track• The partnership is grievance rather than solution-focused• There is a lack of communication, or unequal involvement by partners• Partners show a lack of respect for others in the partnership in meetings, communications or working practices• Unequal skills or resources across the partnership (which may lead to the balance of power lying with one partner)

Case Study

Sunderland Culture Co. – best practice partnership

Sunderland Culture is a new organisation bringing the management of Sunderland's key cultural assets under one roof, and the investment of the City's three main funders of arts provision (Sunderland City Council, University of Sunderland and The MAC Trust).

"In developing the Company, strong partnership was essential - the overriding drive has been working towards what is good for Sunderland. The governance structure keeps any bias in check - we have eleven board members, six representatives from the partners, and five independent Trustees."

"The key question has to be "How good a partner are you?" When things have become difficult, it's always been about partnership, proper commitment and effort. We've achieved all we have during austerity, only because the partners haven't seen it as a side-line, or 'additional'. They've had to change how they operate to accommodate the project. It has to go beyond self-interest. In Sunderland, there were a lot of people who felt passionately about changing the place for the better."

"We've made a very broad definition of culture in Sunderland and been inclusive - we took culture out of the preserve of the established cultural sector and opened it out to grass roots which has been very successful. It's a strong reminder that the 'Cultural Sector' is only a very small part of cultural life."

"A key question for cultural organisations just now is capacity - how to manage the already difficult demands with very limited resources. A sense of what is really important sometimes gets lost in the all the demands. It needs really good, strong leadership to drive through what's actually important and relevant, then structures and programmes need to be put in place to make that thing happen."

Extract from an interview by Culture Radar with Graeme Thompson, Dean, Sunderland University and Rebecca Ball, Creative Director, Sunderland Culture, February 2019.

www.sunderlandculture.org.uk

Best practice 4: Digital

Many policy and sector agencies are interested in supporting digital and new technology to solve contemporary heritage and traditional culture challenges. Historic Environment Scotland sets out its understanding of digital best practice as a means of:

- Improving heritage understanding and interpretation
- Increasing accessibility to heritage
- Ensuring the long-term preservation of heritage assets

For organisations wishing to increase sustainability, these might be augmented with:

- Opportunities to monetise heritage-related intellectual property
- Exploring opportunities for digital collaboration for business development, market research and audience development

Actions	Outcomes
<ul style="list-style-type: none"> • <i>Moray-wide digital audit of skills, capacity and use of new technology for promotion and presentation of heritage</i> 	<p>Digital Heritage Strategy for Moray</p>
<ul style="list-style-type: none"> • <i>Sector attendance and engagement with national agency initiatives and programmes to develop digital leadership, skills and resilience</i> • <i>Pilot collaborative projects exploring digital tools for marketing, business development, fundraising, data-collection, market research</i> 	<p>Moray’s heritage sector is proactive in adopting and developing digital solutions and partnerships for business resilience, heritage management and interpretation, market development, sales and promotion</p>
<ul style="list-style-type: none"> • <i>Explore digital partnerships for engagement and interpretation innovations around key heritage assets</i> 	<p>Moray’s heritage is accessible to more diverse national and international audiences and stakeholders through new and innovative platforms</p>
<ul style="list-style-type: none"> • <i>Research and development initiatives to explore digital solutions to the management of heritage collections, archiving and exploitation of heritage intellectual property (e.g. of publications, genealogy services)</i> 	<p>Digital solutions support the preservation and conservation of Moray’s unique and diverse heritage for future generations</p>

Potential Leadership supporters, funders, partners include:

National Lottery Heritage Fund
Highlands and Islands Enterprise
Museums Galleries Scotland
NESTA

SCVO Digital Leadership Programme
Wolfson Foundation
National Archives
Wellcome Trust

Case Studies

Historic Environment Scotland: DigiFest 2019

Historic Environment Scotland ran its first digital heritage festival in 2019 at The Engine Shed, Scotland's dedicated building conservation centre in Stirling. DigiFest showcased Scotland as a world-leading innovator in the heritage sector, as well as highlighting the use of technology to preserve and explore the nation's vibrant history. Visitors experienced latest technologies in areas such as 3D modelling and printing, augmented reality, virtual reality, gaming, animation, robotics and coding. It also included a two-day international conference for heritage professionals, *DigiDoc*, to showcase ground-breaking technology from organisations such as Google, the Smithsonian Institute and games developer, Ubisoft as inspiration for heritage organisations.

[DigiFest 2019](#)

SCVO Senior Leaders Programme, 2020

In November 2016 SCVO published its "Call to Action to Create a Digitally Confident Third Sector in Scotland". Findings showed digital leadership wasn't just about using new technology - it was about understanding people's changed expectations (challenging 'the way we've always done it' by being curious and bold) and responding to people's new expectations. It encouraged voluntary sector organisations to explore, adapt, invest and collaborate to create a more digitally confident third sector in Scotland. It was recognised that the change required would be different for every organisation, but there were 5 overarching themes to focus on: effective leadership, digital culture, service delivery, being data driven and flexible technology. The research led to the development of its Senior Leaders Programme for 2020 to help third sector leaders grow their skills, confidence and understanding of digital opportunities.

www.scvo.org.uk

Canada Council for the Arts: The Arts in a Digital World

In 2017 Canada Council for the Arts undertook large-scale sector research to measure the digital readiness of arts organisations, help them identify digital gaps and create plans to lever digital opportunities. The fund encouraged projects that demonstrated: collaboration, partnership and networking; open-mindedness, and willingness to share knowledge, results, ideas and lessons learned; experimentation, risk-taking and iterative development. The projects funded included themes such as:

- Reaching new audiences and markets
- Engaging the public in new digital ways
- Building new partnerships and networks to improve digital capacity
- Better collection and analysis of data to understand impact
- Improving specific areas of business with digital technology
- Transforming business models for long-term sustainability

www.canadacouncil.ca

Operating models

There is currently no one organisation representing or making a sector-wide case for investment in heritage in Moray, and no one place for heritage organisations to access support. The fragmented nature of the sector has been identified as a critical barrier to it accessing strategic funds, support and partnerships for long-term sustainability.

Criteria

Working with the Discover Moray's Great Places Steering Group, potential operating structures were assessed and prioritised against three key criteria:

Strong governance	A lack of strong governance and leadership were identified as critical issues for the sector during consultation. <ul style="list-style-type: none">– Operating structure supports accountability, transparency, compliance and is responsive to both the organisation's context and the sector's needs.
Capacity for income generation, fundraising and tax incentives	It is essential for sustainability for the heritage sector to attract investment to support long term planning and development. <ul style="list-style-type: none">– Operating structure is eligible for tax benefits; is a credible vehicle for receipt of public and/or private funds; can raise income through trading, fundraising, sponsorship; can re-invest financial surpluses within the remit of their constitution and purpose.
Adaptability	It will be essential for this body to lever investment for heritage, and to do so within a rapidly changing funding, political and heritage landscape. <ul style="list-style-type: none">– Operating structure is: adaptive to its business environment; open and networked, encouraging contribution from stakeholders and communities; a learning organisation to ensure it remains informed and relevant in its activities and decision-making.

Timing

The Moray Council published its decision to close its Museums Service on 28 October 2019, with its last remaining heritage asset, The Falconer Museum, scheduled for temporary closure until a solution for its future is found. The announcement changes the heritage ecology in Moray, with implications for a new operating structure (primarily whether it could or would be required to accommodate the Falconer as a capital asset with a collection, or not). While independent solutions are being explored for the Falconer, it may be prudent to be open to exploring a new operating model accommodating a capital asset, without being driven by that outcome.

Options

Following a longlist, three options were assessed in detail with the Discover Moray's Great Places Steering Group. Key features, advantages, disadvantages and recommendations are explored below:

Charitable Trust	Scottish Charitable Incorporated Organisation	Membership Organisation
<p>Most common model for transferred out Council culture, museums, theatre and leisure services, and a common charity structure for the independent sector.</p> <p>Constitution usually follows charitable objectives (or via trust deed).</p> <p>Not for profit</p> <p>Regulated by OSCR</p>	<p>Increasingly popular model in heritage sector - structure purpose built for voluntary sector, with similar governance requirements as charity.</p> <p>Limited liability and separate legal identify for charitable status without complexity of structure of a charitable company.</p> <p>Not for profit</p> <p>Regulated by OSCR</p>	<p>Popular model for 'industry' representation – with a clear purpose, advocacy and incentives.</p> <p>Legal structure and constitution ranges from simple (rule book) to complex (Ltd Company, Charity, SCIO)</p> <p>Can be for profit (depending on constitution)</p> <p>Regulated by OSCR (if constituted as charity) but also accountable to its membership</p>
<p><i>Advantages:</i> Defined legal entity with limited liability, robust governance, reporting and transparency.</p> <p>Supports charitable trading and fundraising (but may not support membership / subscription income).</p> <p>Eligible for tax benefits</p> <p>Can hold capital assets and employ staff.</p>	<p><i>Advantages:</i> Defined legal entity with limited liability, without some associated burdens of charities or company structures.</p> <p>Supports trading, fundraising - allows separate membership and income from membership.</p> <p>Eligible for tax benefits</p> <p>Can hold capital assets and employ staff.</p>	<p><i>Advantages:</i> Can provide robust governance, reporting and transparency.</p> <p>Supports trading and membership income – fundraising if charitable constitution adopted.</p> <p>Eligible for tax benefits</p> <p>Can potentially hold capital assets (but less likely to) and employ staff.</p>

Charitable Trust	Scottish Charitable Incorporated Organisation	Membership Organisation
<p><i>Disadvantages:</i> Depending on scale, a Trust may take time to establish (e.g. if it were to include the transfer of Council assets).</p> <p>If including Council asset transfer, self-generating income mechanism required at outset.</p>	<p><i>Disadvantages:</i> Dependent on retaining charitable status.</p> <p>Holding capital may be burdensome if largely volunteer-led.</p>	<p><i>Disadvantages:</i> Robustness and transparency of governance dependent on constitution type adopted.</p> <p>If company model adopted, fundraising capacity limited to some public funds, but not eligible for fundraising from private sources.</p> <p>Accountable to members – may restrict activity or capacity for adaptation.</p> <p>Success dependent on scale and market potential.</p>
<p><i>Implications for heritage?</i> Tried and tested heritage model in Moray at different levels including capital and community development trusts.</p> <p>Time and complexity to establish will depend on whether trust is independent or part of a Council ‘transfer out’.</p> <p>Danger operations and fundraising becomes focused on preserving a capital asset, over broader sector sustainability.</p> <p>If trust includes heritage capital, organisation and board must employ and include professional heritage skills and expertise.</p>	<p><i>Implications for heritage?</i> Quick, flexible and credible platform for heritage groups to formalise.</p> <p>Many examples of adoption in heritage sector with professional skills and expertise included in variety of operating structures.</p> <p>Many examples maximise the social capital of their networks and memberships for advocacy, membership income and leveraging strategic investment for regional or member benefit.</p> <p>While structure can include capital assets (buildings, collections) it may not be seen as robust (as a charitable company or Trust) by some funders and agencies.</p>	<p><i>Implications for heritage?</i> Creates purposeful peer-network for heritage members to ‘belong’ to with tailored services, events, training.</p> <p>Provides strong advocacy ‘voice’ for heritage industry sector, but Moray currently lacks cohesion and scale to define a shared vision and purpose, carry a full membership offer or sustain it without public investment.</p>

Charitable Trust	Scottish Charitable Incorporated Organisation	Membership Organisation
<p><i>Recommendation:</i> If there is a need to accommodate a capital asset, a trust structure could be the preferred option in terms of giving confidence to funders and investors of robust governance. If the capital asset is to include a museum with its collection it will be important to ensure: appropriate due diligence relating to the asset and the transfer; that adequate professional heritage skills and expertise are recruited to its board as well as to the operational staff; and that adequate self-generating assets are included in the transfer to contribute to sustainability. These will be essential to ensure best practice and avoid burdening the new Trust or owner with excess liabilities (and therefore drawing attention away from the overall strategic purpose of the organisation i.e. the sustainability of Moray's broad heritage long term).</p>	<p><i>Recommendation:</i> This is a popular, tried and tested structure that has been adopted by many organisations with a similar regional or heritage sector purpose. The flexibility it offers does not impose heavy administrative burdens on a new organisation, whilst still being regulated as a charity and giving access to broad charitable benefits. SCIOs include potential for (paid) membership which can help to develop strong, dedicated, pro-active communities focused around a single purpose. While SCIOs can accommodate capital assets, the nature of the asset should be considered in relation to the organisation's proposed administration and operational capacity (e.g. in the case of the transfer in of a museum with a collection). Funders will seek confidence that the structure is robust enough execute appropriate governance, employ or retain suitably qualified professionals to manage the heritage and raise adequate funds and investment to resource it and deliver its broader brief. If no capital asset it to be included, and the model's main purpose is delivery of a business plan and strategic activity, a SCIO could be an appropriate and convenient model for Moray's small, largely volunteer-led sector to grow and adapt.</p>	<p><i>Recommendation:</i> While membership organisations are also tried and tested across the culture and heritage sector, and would bring a strong advocacy and lobbying angle, there is currently a lack of scale and reach in the heritage 'marketplace' in Moray to realistically support or sustain a fully formalised membership model, without public or private funding (which some legal structures would not be eligible for).</p>

How heritage and culture sectors in other parts of the UK have interpreted these models, and shaped them to their own unique environments and contexts, are illustrated through case studies below.

Group Case study: Milton Keynes – a multi-model regional approach

As a new town, Milton Keynes has worked hard to define its heritage. It has several organisations working at different levels to support and develop the sector, and an overarching strategy which roots and provides long term vision for the town's heritage activities.

These are set out over pages 37 – 39.

Arts and Heritage Alliance Milton Keynes

The Arts & Heritage Alliance Milton Keynes (AHA-MK) is a forum of organisations that work together to position the arts and heritage sectors as strategic contributors to the community and economy of Milton Keynes. It is a charitable incorporated organisation (CIO) with a charitable constitution, governed by a board of trustees.

Members of AHA-MK have opportunities to work collaboratively to represent, promote and develop the culture and heritage offer in Milton Keynes and the wider region. Benefits for members include:

- Helping to assemble evidence of the impact of arts and heritage activity in Milton Keynes to assist in making the case for support to funders and strategic organisations
- Demonstrating the successes and achievements of Milton Keynes' arts and heritage organisations
- Responding to consultations on strategic issues with the collective views of the whole membership

- Involvement in collaborative activities aimed at increasing members' audiences and raising the profile of arts and heritage in Milton Keynes
- Collaborative promotion of the city's cultural offer to the people of Milton Keynes, the business sector, stakeholders and decision-makers
- Collaborative promotion of the value of arts and heritage to the economic and social development of Milton Keynes
- Opportunities to experience and learn from a programme of inspirational speakers and workshops
- Access to learning resources specifically developed by and for members, and sharing best practice through professional development opportunities
- Participation in discussion and development of initiatives and activities that address key issues or opportunities for the sectors
- Opportunities for networking, developing joint activities, creating mutually beneficial partnerships.

www.aha-mk.org

Milton Keynes Heritage Association

The Association was formed in 1994 with the aim of encouraging and developing collaboration between heritage organisations in Milton Keynes, north Buckinghamshire and South Northamptonshire. It has around 60 members, ranging from individuals to community groups, to larger museums, with membership for organisations £10 a year.

The Association adopted a formal constitution and operates via a business plan, both of which are reviewed annually prior to its AGM. It is managed on a day to day basis by a voluntary Executive Committee with clearly defined roles and responsibilities. It has adopted formal policies covering Child Protection, Education and Equal Opportunities. Sub-groups handle IT, Archaeology, and Association projects such as its Heritage Open Days, and Young Heritage Hunters. A small local authority grant supplements membership, admin and web-hosting costs, and supports small grants for its members.

Member benefits include a regular e-newsletter, quarterly meetings, grants, website hosting, free IT and archiving training and heritage advocacy. A genealogy and family history facility, and Heritage Open Days are provided to the public. The Association's website provides a one stop diary of member's activities and events.

www.mkheritage.org.uk

Heritage Milton Keynes

Heritage MK is a consortium of heritage organisations in Milton Keynes including: Bletchley Park; City Discovery Centre; Cowper and Newton Museum; Living Archive Milton Keynes; and Milton Keynes Museum.

Together, the consortium has developed a sophisticated volunteering scheme which operates under the categories:

- Give a Day
- Work as a Team
- Hour or Two
- Just a Minute
- Regular Help

Each category is associated with specific challenges and tasks, such as re-organising a museum store, or identifying local historical images.

Each challenge is specified online so volunteers can sign up and build their volunteering skills – whilst providing a targeted approach for the consortium to manage volunteering.

www.heritagemk.volunteermakers.org

Milton Keynes Heritage, Museums & Archives Strategy 2014 - 2023

Prepared by Milton Keynes Council, the strategy is organised around three priorities:

- Identity - enabling infrastructure that creates a sense of place
- Opportunity - creating activities that raise participation
- Celebration - creating experiences and sharing successes

Each priority has a small number of key outcomes associated with it, for example 'Celebration' includes:

- A year-long programme of events celebrating MK's arrival as an International City
- Borough-wide free events that celebrate the unique diversity of heritage in Milton Keynes and its communities and cultures
- Events linking Milton Keynes families with global communities

'Opportunity' includes:

- Increasing engagement in heritage through marketing and partnering with commercial partners and introducing digital technologies to increase access
- Creating a centralised virtual heritage offer, building on the existing work of the MK Heritage Association and MK Collection partners
- Co-ordinating a skills and training volunteer programme for local people of all ages and backgrounds with progression routes, social and health benefits.

The Council takes a co-ordinating role in delivering the strategy, and its delivery plan describes stakeholders, outcomes, outputs, and dates. Key partners include: Destination Milton Keynes, Local Enterprise Partnership and Milton Keynes University.

www.milton-keynes.gov.uk › attach › [Heritage Strategy](#)

Summary of what each Milton Keynes model contributes:

- Arts and Heritage Milton Keynes represents, promotes, supports and develop its active heritage members
- Milton Keynes Heritage Association fosters cooperation across the sector within a given geographic area. It adopts an inclusive approach with all scale of organisations and individuals in the membership, targeting communication and knowledge exchange.
- Heritage Milton Keynes is a consortium of larger heritage operators collaborating to develop ambitious projects and mechanisms, including a sophisticated volunteering programme to increase participation and develop best practice.
- MK Heritage, Museums and Archives Strategy operates over a realistic timescale (9 years) and a small number of key priorities to help focus the work of the sector.

Case study – a Council service transferred out

Create Gloucestershire

In 2011, faced with budget cuts, Gloucestershire County Council looked for options to maintain the county's arts and culture offer while reducing its financial contribution. A group of local arts and culture leaders set up Create Gloucestershire (CG) and discussed options to oversee arts and cultural provision using start-up funding from the council (the arts development budget, which had previously been used to fund key arts providers).

It set a goal to be self-sustaining within three years - during the first two it established new sources of income through fundraising from non-arts or culture Council departments. Membership of CG is open to anyone in the sector which creates a pool from which partners can come together and bid for funding.

CG began to deliver a programme of capacity building, leadership training, evaluation, fundraising and business development. It brought together individuals and organisations to share expertise and resources, engage with funders and commissioners and further diversify income streams.

CG's approach to cultural development has been grassroots-up, underpinned by collaboration. It has been successful in growing investment, especially from non-arts sources. Secured funding is distributed across its members to pilot and test new ways of thinking about, planning and delivering arts and culture. This has led to new projects in libraries, GP surgeries, schools, day care settings and housing estates.

CG has more than 180 members and associate members and brings the arts and cultural sector together as one coherent voice for audiences, policy makers and funders. Working with a range of strategic partners it creates, researches, tests and shares ideas and projects in response to social, cultural and economic needs.

CG does not 'run' services – its job is to ensure the right conditions are in place for arts and culture to thrive, using funding from a range of sources. Its core funding supports a light touch central team, with the rest distributed to members and partners to deliver specific projects or services.

Learning from the CG approach concludes:

- Collaboration allows creative organisations to do things they could not do on their own
- Changing business models takes time and trust
- 'Quick wins' are needed to convince people it is worth the extra effort, but these need to be delivered within the context of a long-term vision
- Shared data collection and analysis is vital to both prove impact and improve the cultural sector.

www.creategloucestershire.co.uk

Case Study – a collaborative, regional approach

CHARTS Culture Heritage and Arts Argyll and Isles

CHARTS grew out of a regional desire to create a sustainable future for the Culture, Heritage and Arts sector in Argyll.

Following a two-year action research process supported by a Creative Scotland Place Partnership, CHARTS registered as a SCIO and membership organisation in 2019 to:

- Foster collaborative working across the whole Culture Heritage and Arts sector
- Create events and products that are of sufficient quality and scale to be marketable at the highest level
- Create an environment that supports sustainability for sole traders and micro-businesses so they can afford to stay in Argyll and the Isles
- Be an advocate for the needs and benefits of cultural activity

It provides an interactive, public and member orientated website, collaborative sector events, projects and meetings, training and member-informed fundraising initiatives with a small staff of two (with an expectation this will increase relative to demand and resources).

CHARTS attracted funding from: Scottish Government, Argyll & Bute Council, Scottish Rural Development Programme, LEADER, European Agricultural Fund for Rural Development.

www.chartsargyllandisles.org

Conclusion and Recommendations

Conclusion

There is a demonstrable need for an over-arching operating model to present a shared and inclusive vision for the heritage community in Moray which responds to urgent sector needs, including:

- With the imminent closure of the Moray Council Museums Service there is an urgent need for Moray's heritage community to mobilise and resolve barriers to sustainability
- With no cohesive voice making a case around heritage investment or partnership, there is a danger current opportunities will be missed for heritage in the short term e.g. Moray Growth Deal, Elgin Cultural Quarter, Moray Speyside Tourism BID
- There is an urgent need to assess the actual level of investment and professional expertise needed to preserve, manage and develop Moray's heritage following best practice, and mitigate risks for its heritage assets
- The heritage community urgently needs to build capacity in skills, and partnership working (across and beyond the heritage sector)
- The diversity of the largely volunteer heritage workforce in Moray must shift for managed succession-planning, resilience and to enable change.

Outcome

- While there is no one representative support organisation for heritage in Moray, simply putting a new structure in place will not achieve sustainability.
- With a clear vision and strategy however the sector will move towards an operating structure tailored to Moray's needs. In the medium-to long term, the Moray Strategic Heritage Framework can be implemented to drive change and investment, but collaboration and a managed development process is required first to prepare the way.

Recommendations

1. **Strategic recognition for heritage:** The current and potential contribution that heritage (in all its forms) does and can make to a successful Moray to be recognised by the Moray Economic Partnership and be 'written in' to the Moray Economic Strategy. This is essential if the sector is to access the investment and support it needs for sustainability and growth that will benefit Moray long term.
2. **Groundwork:** In the short term, essential development work is needed to bridge the gap between where the community currently is in terms of skills, capacity and partnership working, and where it needs to be to confidently select an appropriate operating model.
3. **Partnership development:** It is essential Moray's heritage community is at the heart of this change process – a first step will be to establish a skilled, expert Forum to collaborate with partners and stakeholders in the execution of the Route Map (see below).
4. **Dialogue with Moray Council:** Although the Council is closing its Museum Service from April 2020, dialogue needs to be maintained between the Forum's work around a new operating model, and the Council while it conducts its own feasibility and transition planning for the Falconer Museum.
5. **Delivery of a Route Map for change:** A step-by-step Route Map has been designed to help the heritage community begin to bridge the gaps identified and move forwards. The Route Map (set out in the next section) can be used as the basis of an application for funding which should be implemented as soon as possible.

Route Map 2020 - 2022

Timetable for Route Map

			2020	2020	2020	2021	2021	2021	2022
	Project milestones	Project Lead	Jan-Mar	Feb - June	Jun - Dec	Jan - Dec	June	Aug	Jan - June
1	Establish Moray Heritage Forum	Discover Moray's Great Places / New voluntary Heritage Forum members							
2	National Lottery Heritage Fund Application	Heritage Forum NLHF Working Group							
3	Strategic Framework Development Project	Supplier / Project Coordinator (tbc)							
4	Research Investment Partnerships	Supplier / Project Coordinator (tbc)							
5	Operating Model	Heritage Forum Governance Working Group							

Moray Strategic Framework and Operating Model Route Map key milestones

1. Establish Moray Heritage Forum
2. National Lottery Heritage Fund Application
3. Strategic Framework Development Project
4. Research Investment Partnerships
5. Operating Model

Route Map Outline Project Plan

Milestone 1: Establish Moray Heritage Forum				
Establish members, terms and processes for the Heritage Forum, responsible for leading and facilitating delivery of the Route Map, making funding applications and leading feasibility work around new operating model (Milestone 5). Forum members must collectively possess the skills and expertise to inform and fulfil Forum tasks and effectively work with partners in execution of the Route Map.				
Tasks	Who	Outputs	Timeframe	Outcomes
<ul style="list-style-type: none"> Meeting of outgoing DMGP and incoming MHForum, 17 January 2020 	8-12 heritage professional and volunteer Forum members drawn from breadth of the community with appropriate skills. Includes mechanism to engage key strategic partners (e.g. from MGS, and from enterprise, tourism, education and elected Council members)	Meeting date of first forum meeting	17 Jan – Mar 2020	Forum formally established
<ul style="list-style-type: none"> Forum volunteer Members and Chair agreed Forum Terms of Reference agreed and adopted for two-year term Lead partner member identified and agreed for funding applications [Moray Speyside Tourism] Identify missing skills / representation from Forum (should include heritage, community, business, tourism and education reps) Recruit missing skills / representation Mailing and social media list drawn from Discover Moray's Great Places – opt ins Funding application to NLHF made (Milestone 2) Oversee, inform and deliver (as required) Milestones 3, 4 and 5 		Agreed Terms of Reference (<i>see Appendices for Draft ToR</i>) Opted-in Forum mailing list Forum social media platforms (FBook, Instagram, Twitter) Public announcement of Forum and intentions Strong Forum established with skills and expertise to fulfil Forum tasks and minimise need for external facilitation / costs.		Heritage leadership in Moray is increased. Forum members have: <ul style="list-style-type: none"> Understanding of their strengths as heritage leaders and change-makers Gained confidence in advocacy and influencing skills Strengthened their networks across the heritage and funding sector Built confidence in seeking out, and engaging with decision- and policy makers across Moray Working Group successful in NLHF funding Route Map complete

Milestone 2: National Lottery Heritage Fund Application

The Heritage Forum will liaise with National Lottery Heritage Fund and key stakeholders to steward a successful application for funding to deliver the Route Map. The Route Map forms the basis of the Project Outline for the application. The lead partner to make the application and administer the funding on behalf of the Forum is Moray Speyside Tourism (dependent on timing of the application), or another appropriate and eligible body.

Tasks	Who	Outputs	Timeframe	Key Outcomes
<ul style="list-style-type: none"> Forum Working Party initial discussion with NLHF Open Project Funding (Tom Ingrey Counter, Diane Gray, Megan Braithwaite) Application lead / host organisation agreed (Moray Speyside Tourism, or suitable org with appropriate track record and eligibility) 	Heritage Forum NLHF Working Party (liaising with key sector stakeholders)	Minutes and actions circulated via Moray Heritage Forum and lead applicant.	Feb 2020	<p>NLHF Working Party informed of requirements for application.</p> <p>Decision made on level of funding required and application type (over/under £100k)</p>
<p>Collate documents for application submission:</p> <ul style="list-style-type: none"> MST governance documents and accounts Heritage Forum Terms of Reference Outline 2-year project plan (taken from Route Map Milestones 3, 4, 5 and 6) Budget (including source of any cash/in-kind support) Supplier / Coordinator Brief for project delivery Draft evaluation framework Draft environmental sustainability statement Key contact details 	<p>to confirm support)</p> <p>Applicant lead / host organisation (MST)</p> <p>NLHF lead contact</p>	<p>1 x NLHF application submitted with relevant documentation</p> <p>1 x Supplier / Coordinator brief advertised</p> <p>Supplier / Coordinator interviews</p> <p>1 x Supplier / Coordinator contract</p> <p>Public announcement of award, Forum, supplier and project aims</p>	March – May 2020	<p>Moray Strategic Framework Development project secured (inc. supplier fees, project costs)</p> <p>Moray Strategic Framework Development Project Supplier / Coordinator appointed.</p> <p>Positive heritage sector news for Moray – begins shift in perception and reputation of heritage sector ambition.</p>

Milestone 3: Moray Strategic Framework Development Project (NLHF 2 Yr Project Outline)

The activity delivered in Milestone 3 represents essential groundwork to prepare and develop the heritage community in Moray in advance of establishing a new operating model. It includes commissioning baseline research and audits to inform future targets, partnerships to support business skills and volunteering, audience and market development projects and processes to establish a baseline for heritage best practice in Moray. This activity funded by a NL Heritage Fund grant and delivered by a contracted supplier or coordinator (reporting to the Forum).

Tasks	Who	Outputs	Timeframe	Key Outcomes
<p>Administration</p> <ul style="list-style-type: none"> Moray Heritage Forum to refine Moray's Vision for Heritage Moray's Heritage Forum clarify and refine Strategic Framework Development Project objectives, activity, timeframe and project budget. Funder reporting and evaluation clarified – evaluation framework implemented Circulation of sector news, heritage, funding information and digital resources via Forum contact list and social media 	<p>Heritage Forum</p> <p>Heritage Forum</p> <p>Supplier / Coordinator leads with direction from Heritage Forum</p>	<p>Confirmed project outline and agreed activity plan with outputs, timeframe and budget agreed</p> <p>8 x Heritage Forum meetings coordinated and minuted</p> <p>8 x update reports to Heritage Forum, stakeholders and funders</p> <p>1 x Project Evaluation Report</p> <p>Monthly social media updates / contacts with sector news and information</p>	<p>July - Aug 2020</p> <p>August 2020 – June 2022</p> <p>August 2020 – June 2022</p>	<p>Moray Strategic Framework Development Project launched with agreed targets, timeframe, outputs and reporting.</p> <p>Forum and Framework established and evident as 'active' on behalf of sector</p>
<p>Research and evidence gathering</p> <ul style="list-style-type: none"> Commission heritage conservation and development review – audit of conservation projects underway and use of heritage assets across Moray Commission Digital audit to establish current baseline for digital skills, capacity, usage and application for heritage 	<p>Commissioning and project management of research projects coordinated by Supplier / Coordinator (liaising with</p>	<p>1 x professional heritage development and management report with recommendations to inform investment and fundraising for next 5 years</p> <p>1 x professional digital audit report with recommendations to determine investment and</p>	<p>Aug 2020 – Jul 2021</p>	<p>Scope of finance, capacity and professional resource 'need' around Moray's heritage capital and collections quantified</p> <p>Baseline for digital innovation and best practice development quantified</p>

<p>marketing promotion, interpretation and engagement, income and IP across Moray</p> <ul style="list-style-type: none"> • Research field trips / delegations to learn from experience of other (recent) heritage-focused operating models established to sustain, represent and support heritage/culture. • Heritage Impact and Evaluation Framework designed – survey delivered to establish baseline impact measures for advocacy, funding and partnership development 	<p>and reporting progress to Heritage Forum)</p>	<p>development requirements for innovation and enterprise development</p> <p>3 x research field trips; 1 x report with key findings and best practice case studies to inform operating model decision-making</p> <p>1 x Heritage Impact Survey to collect baseline impact measures for advocacy, investment and partnership</p> <p>4 x Research project findings shared across Heritage Forum contacts, social media</p>		<p>Moray heritage priorities identified, quantified and aligned with regional economic and rural development priorities</p> <p>Baseline needs and development targets for new operating model clarified</p>
<p>Business and volunteering skills development</p> <ul style="list-style-type: none"> • Pilot Moray Heritage Forum masterclasses & peer learning events delivered with professional speakers on priority heritage & business themes to build skills, knowledge and network across region • Pilot volunteer training around governance, business and fundraising skills • Pilot collaborative projects to support development of heritage interpretation and engagement 	<p>Commissioned and project managed by Supplier / Coordinator (liaising with Heritage Forum – delivery via relevant sector and regional partners</p>	<p>4 x masterclasses / peer learning events (5 x per year)</p> <p>4 x volunteer training events per year (in partnership with third sector supplier)</p>	<p>Aug 2020 – May 2022</p>	<p>Learning from pilots informs new operating model’s partnership approach to delivering cost-effective volunteering, business and specialist heritage skills and engagement development for Moray’s heritage sector</p>

<p>Audience and market development</p> <ul style="list-style-type: none"> • Distribution plan for Discover Moray's Great Places marketing collateral • Heritage tourism marketing advice and support • Coordinated visitor and engagement data collection project • Compilation and input of heritage sector events and activities into MST region-wide events calendar • Development of further heritage brand communication strategies • Coordinate heritage sector contributions and partnerships with regional food/drink/music festivals / winter events programme / Moray Growth Deal activity to increase and diversify heritage audiences 	<p>Commissioned and project managed by Supplier / Coordinator (liaising with Heritage Forum)</p> <p>Partners: Moray Speyside Tourism; Moray Council; GSA Heritage Futures</p>	<p>2 x heritage promotions via Moray tourism-related business network (1 x p.a.)</p> <p>2 x heritage tourism advice sessions for small-scale heritage groups (1 x p.a.)</p> <p>Forum registered with and contributing to The Audience Agency</p> <p>1 x purchase Audience Agency or alternative supplier sector data.</p> <p>10 x Moray heritage organisations signed up with GSA Heritage Futures, Jan 2020</p> <p>Moray Heritage Forum representation in 4 x regional event programmes (2 x p.a.)</p>	<p>Aug 2020 – May 2022</p>	<p>Incremental positive impact being achieved in the demographic of Moray's volunteers and audiences</p> <p>Moray's heritage sector is visible in new business, tourism and educational contexts</p>
<p>Best practice</p> <ul style="list-style-type: none"> • Pilot young leader programme with local institutions and / or business support • Sector-wide volunteer recruitment promotion project to target and attract new, younger demographic with priority skills to take part across Moray (e.g. Heritage MK's Volunteering programme Give a Minute, Work as a Team, An Hour or Two, Regular Volunteering) 	<p>Commissioned and project managed by Supplier / Coordinator (liaising with Heritage Forum)</p> <p>Partners:</p>	<p>1 x Young Heritage Leaders pilot programme delivered, with sector and business support (project funded / sponsored)</p> <p>2 x volunteer recruitment and volunteering promotions delivered</p> <p>2 x governance and board training events</p>	<p>Aug 2020 – May 2022</p>	<p>Awareness of Moray's heritage, opportunities and benefits of engagement, is increased</p> <p>Increase in younger / more diverse volunteers in sector</p> <p>Benchmark targets for best practice in heritage governance, volunteering and collaboration set</p>

<ul style="list-style-type: none"> • Best practice governance and board training for voluntary organisations – heritage sector masterclass • Develop Moray-wide community / visitor heritage feedback and satisfaction surveys (to inform operating model’s future enterprise, tourism, education and community strategies) 	<p>Third sector agencies (tsiMoray, SCVO, Arts & Business Scotland, business sector, Moray residents)</p>	<p>1 x baseline heritage feedback and satisfaction survey delivered</p> <p>4 x press / radio coverage of promotions and opportunities around positive benefits of engagement with heritage</p>		<p>Benchmark and targets for heritage visitor engagement and experiences set.</p>
---	---	--	--	---

Milestone 4: Investment Partnerships (NLHF 2 Yr Project Outline)

The activity delivered in Milestone 4 represents essential work needed to establish and prepare investment partnerships that will fund the new operating model. It includes relationship-building and partnership working between the Forum and prospective funders and support agencies, the development of fundraising and income models, and funding proposals which will realise investment prior to the launch of a new operating model. It is anticipated this activity funded by a NL Heritage Fund grant. Advocacy activity should be facilitated by the Forum. Investment partnership tasks outsourced to a fundraising specialist, or supplier with relevant expertise (reporting to the Forum).

Tasks	Who does what	Outputs	Timeframe	Key Outcomes
<p>Advocacy Partnerships</p> <ul style="list-style-type: none"> Heritage sector development agencies (MGS, HES etc) Economic development (Growth Deal – Cultural Quarter) leads (Moray Council) Enterprise and Tourism lead bodies (HIE, MST) Higher Education institutions (UHI, GSA) Third sector volunteer support and development organisations (tsi, SCVO) Business and professional support agencies for training and development 	Moray Heritage Forum	<p>Invitations to Forum events</p> <p>Supplier / Coordinator attendance at regional events, accompanied by Moray Heritage Forum representatives / Young Heritage Leaders</p> <p>Key research findings and recommendations circulated to key funders, agencies, policy groups, opinion formers and Cross Parliamentary Groups (e.g. Culture Tourism, Europe and External Affairs Group)</p> <p>Ongoing social media, press and PR</p>	June 2020 – June 2022	<p>Key agencies, funders and policy makers are aware of the ongoing development and ambition of Moray’s heritage sector</p> <p>Key funders aware of investment needs and potential of heritage sector and engaged with and supportive of development of new operating model</p> <p>Moray’s heritage is building awareness and credibility through coordinated activity and reporting with funders and opinion formers</p>
<p>Investment Partnerships</p> <ul style="list-style-type: none"> Fundraising strategy and income model for new operating model Start-up funding identified and applied for from relevant national funding bodies and agencies 	Supplier / Coordinator support to Moray Heritage Forum	<p>[1 x Fundraiser appointment]</p> <p>1 x Business Plan including Fundraising and income strategy</p>	August 2021 – June 2022	<p>Fundraising target of £130k met:</p> <p>breakdown:</p> <p>£30k p.a. – staff</p> <p>£90k p.a. – project streams</p> <p>£10k p.a. - operating costs</p>

<ul style="list-style-type: none"> • New income pools, investment options and partnerships identified from non-heritage sources (e.g. health, education, social, economic / rural development and regeneration) • Income projections from membership, subscription within new operating business model • Feasibility study to assess potential for partnership, or income-generating capital within in new operating legal and business model • Investment funding identified and applied for to take forward three project streams on launch of new operating model: <ul style="list-style-type: none"> ○ Securing Moray’s Heritage Assets ○ Heritage Business, Leadership and Professional Development ○ Audience and Digital Market Development 	<p>[Contracted Fundraiser – dependent on supplier expertise]</p>	<p>Minimum 3 x funding applications to national funding agencies</p> <p>Minimum 1 x feasibility study exploring non-heritage partner investment / income generating capital to support operating costs</p> <p>Minimum 3 x funding applications / partnership proposals to resource project streams (application project outlines defined by Milestone 2 Research projects)</p>	<p>Dec 2021 – June 2022</p>	<p>Target budget Year 1 = £130k.</p> <p>New operating model launched with resource to deliver projects and begin sector change, development and sustainability</p>
--	--	--	-----------------------------	--

Milestone 5: Operating Model (NLHF 2 Yr Project Outline)

Milestone 5 should be led, as far as possible, by the Heritage Forum (seeking governance or legal expertise as required). The purpose of this milestone is to ensure all the administrative and legal work is carried out to secure a new operating model, and that essential feasibility work and processes are followed to ensure it is the right structure to meet the needs of Moray's heritage community, and deliver its long term aims.

Tasks	Who	Outputs	Timeframe	Key Outcomes
<ul style="list-style-type: none"> • Forum defines the scope and purpose of the new operating model (informed by action-research from Milestone 2). • Feasibility work around platform including: 1) options appraisal process; 2) viability testing • Governance – established by Forum • Legal documents (charitable objectives / constitution) • Shadow Board elected • Sustainable business plan developed • Legal application / registration with appropriate body • Skills audit and recruitment of Trustees • Board Terms & Conditions agreed 	<p>Moray Heritage Forum</p> <p>Legal representation for charitable application / registration as required,</p>	<p>1 x feasibility study 1 x options appraisal</p> <p>1 x Sustainable Business Plan including:</p> <ul style="list-style-type: none"> • Vision and mission of new operation • Outline of new structure (including provision for trading subsidiary if required) • Moray Heritage Strategic Framework • Internal business model for income generation • External funding partners • Financial plan • Resilience plan • Environmental plan <p>1 x Governing documents 1 x charitable status application 1 x Board terms and conditions 1 x public advertisement for Trustees</p>	<p>Jun 2021 – June 2022</p>	<p>New operating structure established through informed community decision-making.</p> <p>Effective best practice governance demonstrated.</p> <p>Deliverable, sustainable business plan.</p> <p>Motivated, skills and diverse board</p>