

TWAM – Business Plan

2021-22

March 2021

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Executive Summary

This plan is the last update to the 2018-22 TWAM Business plan. However, it also marks a shift in format as the organisation moves towards ACE's new ten year strategy 'Lets Create', and the activity plan section in particular has been restructured to reflect this.

2021-2 is a year of transition. transition away from (hopefully) the necessary covid restriction of 2020-21 and of transition to Arts Council England's Lets Create strategy, which sits people communities, diversity, inclusion and the environment at its core.

This plan sets out our approach to this year of transition, in which we will:

- build on the momentum of our equalities and anti racism work over 2020-21 to develop policies and processes to ensure we extend our work ever further
- welcome back visitors and participants to our venues and programmes, anticipating rising numbers as covid restrictions reduce and society's confidence to reengage increases
- refine our digital engagement learning from the experience of moving so much provision online- but recognising the digital divide in society
- work to embed the Investment principles of the Lets Create strategy in TWAM recognising as we do their ability to strengthen us as an organisation after such as unprecedented year
- support the wider recovery of society for example through our health and wellbeing programmes, our support for schools
- work with Board and internal and external stakeholders to review mission and values
- work with the TWAM partners (four local authorities and Newcastle University) to ensure service delivery and outcomes meet their evolving needs and priorities.
- play our part in strengthening the North East, and indeed the wider North, through preparing for major initiatives in 2022 such as the Lindisfarne Gospels exhibition at the Laing and the 1900th anniversary of Hadrian's Wall World Heritage Site.

This plan also sets out our budget for 2021-2 and approach to ensuring we are able to respond to any shifts the year may bring in order to remain a viable, relevant, and vibrant cultural organisation.

About Tyne & Wear Archives & Museums

TWAM is a large and successful archive and museums service which (in a normal year) receives 1.3m visits per annum to the nine venues which it manages on behalf of four local authorities (Gateshead, Newcastle, North Tyneside and South Tyneside) and Newcastle University. TWAM has a strong reputation for innovative thinking and for the quality of access, equalities, inclusion, wellbeing and learning work. TWAM is increasingly recognised for its entrepreneurial approach. TWAM has a wide network of local, regional, national and international partnerships across the educational, community, business and cultural sectors. TWAM also manages a 'county' Archive for Tyne and Wear.

TWAM is funded by:

- Gateshead, Newcastle, North Tyneside, South Tyneside and Sunderland Councils
- Newcastle University
- The Ministry of Defence (for a regimental museum held within Discovery Museum)
- Arts Council of England

On behalf of ACE, TWAM also manages the regional Museum Development Programme and Culture Bridge North East – the regional cultural development agency for work with children and young people.

When government abolished the former Metropolitan counties in 1986 a number of museum services were directly financially impacted and provision was made for the support of these services on the grounds that they provided 'greater than local services.' In the case of TWAM, consideration was given to the creation of a National Museums Service on Tyneside but it was judged more appropriate to provide national funding to support a locally managed service. From 2012 (following the abolition of MLA in 2010) this support has initially provided in the form of a 'Core Museums' grant from Arts Council England and is now provided as part of TWAM's NPO funding. This funding requires TWAM to:

- Provide free access to core collections (excluding adults at Segedunum Roman Fort),
- Work together as a Joint Service across local authority areas (the current agreement covers Gateshead, Newcastle, North Tyneside and South Tyneside).

The relationship between the four local authority partners is set out in a 10 year Joint Agreement which runs until 2027. The relationship with Newcastle University in respect of the Great North Museum sites lies outside the Joint Agreement and is the subject of separate agreements.

Sunderland City Council is a partner in respect of the Joint Archive Service and TWAM provides some specialist museum services to Sunderland Museums funded by Arts Council and some services including exhibition design on a commercial basis.

This Business Plan is TWAM's main strategic planning document. It provides a framework for the delivery of services; it offers a clear statement of our vision, strategic aims and key policy priorities for the next year.

TWAM 3.0

As part of the development of plans for 2018-22 we created a vision of 'TWAM 3.0' – setting out how we would develop over the next four years and how this would ensure that the experience we provide is:

- more interactive and self-directed.
- more focused on community and users and their needs
- more public, welcoming, and flexible.

Building on our strengths of partnership working, diversity, Children and Young People's learning programmes, community engagement, and outstanding collections we developed a vision for 'TWAM 3.0' which we are implementing in the period 2018-22. It explicitly recognises that the heart of the next phase of our evolution will be through a programme of inspiring and creative work, drawing strength and inspiration from the diversity of our venues, collection and audiences, to allow us to be the catalyst for creativity, risk and experimentation.

What supported TWAM 3.0:

- TWAM's cultural and creative vision: **Working together to make sense of the world through compelling stories of heritage, art, culture and science.**
- Strength through diversity of venues, collections, staff, audiences and producers.
- 'Valuing Voices' – a working culture of audience consultation, experimentation and agency to shape responses to local issues, seed audience contribution and develop understanding of the needs of our many users.
- Working as a catalyst through partnerships to share learning, and encourage innovation.
- A resilient and enterprising business model with a new governance structure providing challenge and support.

The Covid situation of 2020-1 provides both a challenge and an opportunity for the ongoing development of TWAM 3.0, a challenge in that we have had to adapt rapidly to a situation in which we have had restricted direct contact with audiences and users, but an opportunity to allow us to think in new and different ways about the services we deliver.

In addition the impetus of both the new Lets Create strategy and our developing response to Black Lives Matter have facilitated a strong and unified staff focus on issues of equality, which is feeding through our working groups, and is itself an expression of the direction of travel of TWAM 3.0.

Mission, Vision, Commitment

As a civic museum and archive service we recognise that in delivering excellent museum and archive services and providing sector leadership we also need to respond both to the big societal challenges (global warming, migration, growing gap between rich and poor) whilst also focusing on issues in our local communities (changing demographics, child poverty, educational attainment, adult health issues, impact of reductions in public funding) and specific current challenges (promoting anti-racism, working in a society divided in the aftermath of the Brexit vote, adapting to a world impacted by a year of pandemic and recognising that the pandemic has not impacted on everyone equally and has caused further divisions in society)

TWAM's mission firmly sets us in a social context, putting people at the heart of our work. We believe this is increasingly important. Our work over 2020-21, particularly in relation to equalities, has highlighted this and this plan sets out ways in which we can work with individuals and communities, supporting health and wellbeing and contributing to regeneration.

Different people will see TWAM in different ways – a creative organisation, a federation of museums and galleries, a social justice organisation, a heritage organisation, an arts organisation, a focus for research and impact, a tourism asset, a community service - underlying this is its civic purpose – we need to amplify the value of what we're doing because, now, society needs us more than ever.

TWAM's mission has worked well for the organisation for 20 years. We believe that the essence of our mission hasn't changed but that the wording may need to evolve to stay relevant. Working with staff, board members, volunteers and communities we will re-examine the wording of the mission in 2021-22.

Mission To help people determine their place in the world and define their identities, so enhancing their self-respect and their respect for others.

Vision Everyone to have access to museum and archive provision in Tyne and Wear, to use this access and to value it for the significant and positive impact that it makes upon their lives. We will provide real or virtual, worldwide access to our museums and archives and their collections.

Commitment A World-class service that is innovative, imaginative, creative, totally inclusive, secure and sustainable.

Working in partnership regionally, nationally, internationally and engaging our staff, stakeholders, users and volunteers we will build an increasingly resilient organisation. We will provide excellent services centered on our collections and attract investment to grow our programmes and develop our buildings. We will use the best of new technologies and ensure services meet community and individual needs.

TWAM – Aims 2018-22

Working with a team from across TWAM we developed a set of aims for the period 2018-22. These are aspirational and will challenge us. They show how TWAM will develop as an organisation and develop its relationships with a wide variety of users and stakeholders. They set TWAM in its local, regional, national and international context. They recognise the strong role that museums and archives have to play in civil society and the importance of citizens having agency. They explicitly recognise the importance of diversity in everything we do.

These aims, which have been approved by the Strategic Board, set a framework for TWAM to continue to be one of the country's leading regional museum and archives services and for TWAM to continue to be relevant and a powerful agent of change for local people, visitors to the region and our online audiences as well as contributing to shaping the sector and influencing our peers. They will guide us to be more self-sustaining in a climate of reducing public investment in culture and are both to help us respond to external change in terms of the services we deliver and to change as an organisation to ensure that we remain fit for purpose.

A. Increase the cultural capital of individuals and society

- There is now considerable evidence to show that high levels of social capital (bonding, bridging and linking) are linked to a range of positive socio-economic outcomes. We believe that active participation in and engagement with culture will create cultural capital, in turn supporting the growth of social capital, particularly important in our region where there are significant social and economic issues and civic services are increasingly financially challenged.

B. Build the diversity of audiences, stakeholders, practitioners, researchers, and cultural partners

- TWAM embraces the Creative Case. In order to build the quality of our work we will ensure that it is truly diverse, and to achieve that we will engage with, and be challenged by, our audiences, colleagues and partners. Our aim is to ensure that we continually reach out to an ever more diverse network to provide that engagement, scrutiny and challenge, to ensure that the quality of our work is truly enhanced by a greater diversity of voice.

C. Create TWAM 3.0 by developing TWAM people (staff, stakeholders and volunteers) and embedding a working culture of audience consultation, experimentation and agency

- Twenty years ago TWAM was at the vanguard of social inclusion within museums as one of the first services to begin meaningful, structured community engagement. TWAM seeks to build on this twenty years of experience and achievement with a new model ensuring that everyone within the organisation is engaged in the process and that we will move forward on the participation ladder creating agency which in turn contributes to the

development of cultural capital. Through embedding the principles of experimentation and risk taking we will maximise the opportunity for the development of ideas and enterprise.

D. Lead by example and work as a catalyst through partnerships, regionally, nationally, internationally

- TWAM is itself a partnership organisation and responding to the Mendoza Review and thinking developing from the English Civic Museums Network we recognise the importance of partnerships and sharing knowledge, expertise and resources. TWAM already has a number of very strong partnerships regional, nationally, internationally within and without the sector. We will seek to use these to benefit the sector and develop new partnerships to maximise efficiency and effectiveness.

E. Build a resilient, sustainable and enterprising business and organisational model

- Following on from the Museum Rapid Enterprise Assessment in 2013, TWAM has exemplified culture change in its approach to resilience and sustainability. Over the next four years the new governance structure will allow TWAM to develop this to the next stage, making significant change to management practice and reflecting the need for being more agile, quicker to react, and more effective, delivering great customer experiences and taking advantage of new technologies to cut costs, improve quality and transparency, and build value

F. Increase engagement and agency for children and young people with museums and archives

- TWAM has a long history of high quality engagement with Children and Young people, as a museum and archive, but also via programmes such as Creative Partnerships and ACE's Bridge programme. Over 2018-22 we aim to build more consultation with, and leadership by, children and young people into our programmes and across our venues, ensuring that we are hearing, and acting on, their voice to ensure we are able to deliver learning and engagement programmes that truly deliver on their requirements of us.

G. Harness the best of new and existing technologies to drive up quality of experience and engagement

- We recognise there is a need to constantly innovate and improve upon our engagement of audiences, both real and virtual. To do this we are creating a cross venue programming group, with digital innovation and engagement at its core. Its focus will be on methodologies to ensure our programming is always of the highest quality, and collectively engages with the widest possible demographic. We also aim to ensure that our virtual presence is expanded – not least through more meaningful virtual access to our collections. Whilst recognising that there are specific digital skill sets TWAM integrates digital with other activity. As the pace of digital development is rapid we will seek to provide ongoing development to make sure all staff are aware of the opportunities provided by digital. We will develop the mind-sets

associated with digital activity which are leading thinking about the future of cultural provision.

In our planning for 2022-3 and beyond we will review these aims and reinforce/reshape them as necessary to ensure we continue to focus on our mission to make a positive difference to peoples lives.

Values

Staff from across the organisation participated in cross cutting groups to explore and develop a set of values for TWAM in the first year of this Business Plan and further work was done to develop these ideas with the Board. In the light of our experience over the last year and in particular the broad ranging work on Equalities and the new planning work involving every member of staff in the organisation as well as the Board we want to take forward the Values work in 2021-2. This will involve staff, Board Members (from all TWAM boards), volunteers, stakeholders and communities ensuring that values are relevant both within and without the organisation.

Current draft values:

WE ARE

- Authentic – real collections and real stories of culture, heritage, art and science
- Focused – concentrating on meaningful activity that helps fulfil our mission
- Creative – harnessing the inquisitive, creative and experimental energy of staff, volunteers, visitors, stakeholders and collections
- Resilient – working to provide organisational and financial sustainability to support our mission and consciously reducing our environmental impact.
- Knowledgeable – holding, exploring, creating and sharing knowledge about and of collections and communities.

THE WAYS WE ACT ARE

- Generous - providing open access and using the resources we look after for the greater good
- Brave – challenging prejudice and opening services to all, we are not afraid to tackle injustice or to take risks
- Collaborative – as a body which is itself a partnership we build partnerships with individuals, communities and organisations

Strategic Board

TWAM’s direction of travel as an organisation has been set out by the following key processes:

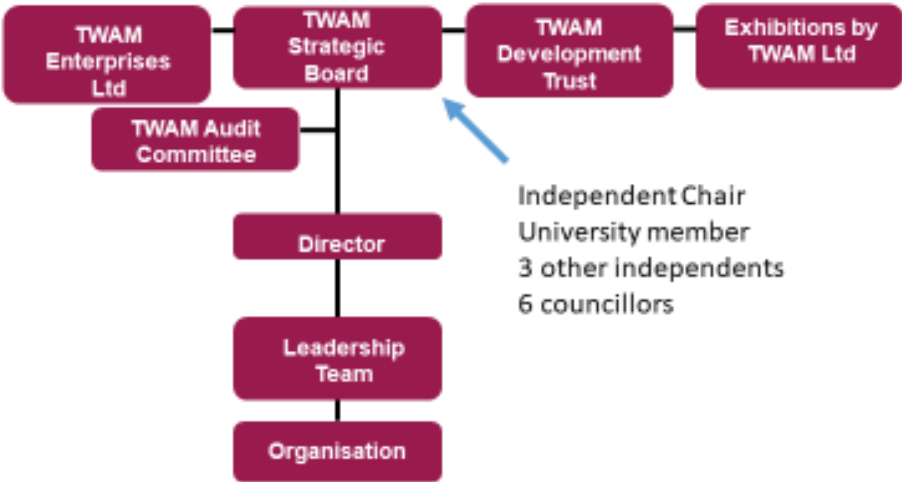
- TWAM Review by Black Radley, 2012
- Museum Rapid Enterprise Assessment by Black Radley, 2013
- TWAM Governance Review by Bond Dickinson, 2014
- TWAM Enterprises Business plan by Ryecroft Glenton, 2015

From 2017/18 TWAM is governed by a new Strategic Board, which includes independent members in addition to elected members. The Strategic Board has six local authority members (normally the cabinet member from each authority plus two non-cabinet members on a rotating basis) and five independent members including an independent chair. The Chair is Rt Hon Baroness Joyce Quin. One independent member represents Newcastle University, the other four are recruited by open competition.

The Strategic Board has an excellent range of skills from across public, private and third sectors and will shape TWAM’s direction on an ongoing basis.

We are committed to ensuring that board members are provided with ongoing support to effectively undertake their roles. Currently elected members are supported via their individual authority and TWAM also provides specific induction and ongoing development opportunities. We also provide support and training to ensure strong relationships between the Strategic Board, the Development Trust, TWAM Enterprises Ltd, Exhibitions by TWAM Ltd and TWAM’s Audit committee to ensure that we use the extensive skills of members of these various bodies most effectively.

The strategic board is expected to evaluate its performance. Built into this Business Plan is provision for the Board to consider how it will appraise itself and its performance.



The Audit Committee includes an independent chair and vice-chair and an additional independent member. It provides an essential challenge, monitoring and scrutiny role in

relation to governance and internal control issues, helping to provide assurance and the early identification and resolution of weaknesses in arrangements.

<https://twmuseums.org.uk/governance/committees>

Regular training is provided for members of the Audit Committee to support the effective implementation of the Audit Committee's *Terms of Reference*. The Audit Committee carries out an annual self-assessment of its effectiveness and agrees an action plan which includes addressing training needs and reports on the outcome to the Strategic Board.

The External Environment

When we wrote the first version of the 2018-22 Business Plan at the end of 2017 we noted that the external environment for archive and museum services such as TWAM was volatile. Public funding was reducing year on year and TWAM's local authority income had reduced by 56% since 2010 with the prospect of further reductions.

In January 2020 Arts Council England launched its new 10 years strategy, the first to be created with museums already within the portfolio. This Strategy, Lets Create, committed to:

value the creative potential in each of us, provide communities in every corner of the country with more opportunities to enjoy culture, and celebrate greatness of every kind. It marks a significant change, but an evolutionary one: honouring and building upon the successes of the last decade while confronting the challenges and embracing the exciting possibilities of the next.

Guided by four investment principles:

Dynamism
Environmental Responsibility
Inclusivity & Relevance
Cultural Communities

The Strategy sets out how investment in cultural organisations will achieve the following outcomes:

Creative People
Cultural Communities
A Creative & Cultural Country

The UK left the European Union on 31 January 2020 and TWAM has continued to monitor impact on staff who are EU nationals, touring of exhibitions, loans of objects, relationships with EU partners and the availability of funding, in particular to support research. TWAM also recognises the divisions in society which have emerged between 'remainers' and 'leavers' and working with all sections of the community remains a priority as part of our equalities work.

On 25 May 2020 George Floyd, 46, died after being arrested by police outside a shop in Minneapolis, Minnesota. This was a trigger for the worldwide #blacklivesmatter movement and for many across the world acknowledging the presence of systemic racism. High profile activity in the UK included the ‘toppling’ of the statue of Edward Colston which was subsequently put in Bristol Harbour. Across the country local authorities have researched the presence of statues and other memorials which can be to commemorate the slave trade and slave owners. Universities have also responded.

In June 2020 TWAM joined organisations and individuals across the North East cultural sector in issuing a joint statement and commitment to denounce racism in all its forms. We have been meeting with representatives from the sector since then to ensure the statement results in action. We have now published our anti-racism statement on our website: <https://www.twmuseums.org.uk/about/anti-racism-statement> and we have committed to producing an action plan outlining the steps we will take to ensure we are denouncing racism by June 2021 in line with our business planning cycle.

This is an important step in our Equalities work, further information about which is contained in the Equalities section of this Business Plan.

TWAM Budget 2021-2

TWAM is a collaboration of 9 venues. It receives funding from the owners of the venues, the four Tyneside Councils (Gateshead, Newcastle North Tyneside and South Tyneside) and Newcastle University. In addition, Sunderland contributes as part of Tyne & Wear Archives. Currently, this funding accounts for about 42% of funding, with a further 44% provided by Arts Council and self-generated income from trading and philanthropy provides the balance of 14%.

A proposed balanced budget for 2021/22 has been prepared.

The forecasts predict 4 phases during 2021/22, based on being permitted to reopen under stage 3 of the Government’s roadmap, no earlier than 17 May 2021. This approach has allowed us to be realistic about visitor numbers and which income streams will generate growth earliest in the recovery process.

ACE NPO funding has been confirmed at the same level as 2020/21 and council contributions are static apart from Newcastle, which has reduced by £125k to reflect the National Non Domestic Rates (NNDR) reduction. The Newcastle University contribution increased by £36k, for the academic year to 31 July 2021.

Other assumptions include a pay freeze, apart from those earning less than £24,000, who will receive a £250 uplift; utility inflation (Gas +9%, Electricity +3%, Water +2%), transitional relief for NNDR, along with 100% relief for 3 months, continuation of the Local Authority Income Loss Recovery Scheme until 30 June, a successful application for ACE CRF round 2 and a moderate use of reserves.

Whilst the budgetary situation continues to change on an almost daily, forecasts are based on best estimates & latest guidance.

The business plan for 2021/22 builds in this flexible approach & includes the risk of consumers being slower to return to cultural venues/activities within the risk analysis. Whilst there are some who are suggesting a potential uplift in visitor numbers once lockdown ends we have taken a prudent approach to budgeting. Risks are identified by a 'risk radar' approach undertaken by the Leadership Team and monitored and challenged by TWAM Enterprises Board, Audit Committee and Strategic Board.

To ensure viability we will use:

- Close monitoring of income/expenditure/footfall
- Adapting opening times/seasonally closing some venues as appropriate
- Stopping recruitment of non-essential posts & non-essential spending
- Scrutiny by Audit Committee & Boards

Risks are managed via COVID specific and strategic risk registers and using:

- Previous experience & lessons learned during lockdowns in the event of further lockdowns
- TWAM planning sub group enables quick response to change
- Careful monitoring of cash flow & active management of expenditure & staffing
- Continue to explore diversification of funding sources

Throughout the pandemic we have listened, learnt and responded to partners and communities. For example, developing relevant and engaging online content for schools, families, students, adults, educators, health professionals and older people delivered over social media, by email, live streamed, blended learning and downloadable resources; this will continue.

If TWAM is unsuccessful in securing CRF the options are:

- Applying for other emergency funding;
- Further use of reserves;
- Holding vacancies and non-essential expenditure;
- Organisational restructure;
- Any additional support available following the Budget Statement
- Requesting additional support from the four Tyneside Councils and Newcastle University.

Budget Income & Expenditure 1 April 2021 to 31 March 2022

Approved Budget 2020/21	Projected Outturn 2020/21		Projected Budget 2021/22
Income			
3,194,650	3,194,650	ACE NPO Funding	3,194,640
0	234,495	ACE Cultural Recovery Fund	174,960
3,134,590	3,134,590	Client Core Funding	3,045,720
634,330	48,034	TWAM Generated Income	279,240
520,000	115,399	Contributed income	313,260
183,080	122,621	Other Income	158,360
0	0	MHCLG Covid Income Loss Grant	41,760
0	0	Use of Reserves	114,360
7,666,650	6,849,789		7,322,300
Expenditure			
5,049,240	4,685,326	Salaries, NI & Pensions	5,096,300
1,142,360	1,004,205	Building Costs	942,360
1,230,390	734,809	Transport, Supplies and Services	1,033,510
194,860	204,567	SLA's with Newcastle City Council	199,440
49,800	49,800	Financing Costs	49,800
0	100,000	Loan to TWAM Enterprises	0
7,666,650	6,778,707		7,321,410
0	71,082	Operating Surplus/(Deficit)	890

The CRF figure in 2021/22 assumes £71,000 carried forward from 2020/21.

Notes to TWAM Management Accounts

ACE NPO Funding: TWAM assume this funding commitment will be received in full.

ACE Cultural Recovery Funding: TWAM have applied to round 2. The budget assumes an award of the amount applied for, along with approval to bring forward £71,000 from round 1.

Client Core Funding: Contributions from Gateshead, Newcastle, North & South Tyneside Councils and Newcastle University. Also includes Sunderland Council contribution to Tyne & Wear Archives. It is anticipated that this funding commitment will be received in full in 2021/22. TWAM's Director is maintaining regular dialogue with the four Tyneside Councils and Newcastle University to ensure that TWAM is able to provide appropriate information in relation to budgets and manage individual budgets in line with client requirements.

Generated Income: Excludes income earned from retail, venue hire, catering, as these are now included within TWAM Enterprises accounts. Income does include events & experiences, admissions, records management, conservation, facilitated learning & consultancy. This income has been revised to reflect the impact of the current lockdown and the visitor profiling referred to above.

Contributed Income: Includes donations, appeals, connected charities, legacies, trusts & foundations; sponsorship and membership schemes. TWAM had set ambitious targets to increase contributed income which have been significantly impacted by the COVID pandemic. However, the TWAM Development Trust have created a fundraising strategy and case for support and in October we launched a fundraising appeal to raise £220,000 by giving £2, £12, £22 or more on a monthly basis.

www.twmuseums.org.uk/about/appeal

Other Income: Includes costs recovered, investment income & revenue grants from organisations like the HLF. Based on known grants, interest on reserves calculations and grant applications.

MHCLG COVID Income Loss Grant: TWAM is able to access this emergency funding via the lead authority Newcastle City Council.

Use of Reserves: It is anticipated £115,000 will be need to support the budget position during 2021/22.

Salaries, NI & Pensions: Includes all costs associated with the employment of the TWAM workforce including overtime, expenses & training.

Building Costs: Includes repairs & maintenance, utilities, National Non Domestic Rates, building insurances & cleaning. Assumes utility inflation, NNDR revaluations and transitional relief applications.

Transport, Supplies & Services: Includes staff travel, promotion, display maintenance, learning & conservation materials, stationery.

SLA's with Newcastle City Council: Includes charges for the following services provided to TWAM via a SLA: payroll, payment of suppliers, procurement & legal advice, internal audit, committee secretariat, ICT, health & safety & HR.

Financing Costs: Repayment of historic debt relating to capital improvement.

As TWAM is a non-legal entity, without a separate bank account, our cash flows are part of those of Newcastle City Council and there is no practical way to monitor them separately. Financial accountability and auditable reassurance for funders that their contributions are being used appropriately by TWAM is achieved via the production of monthly management accounts which are monitored by senior management and the Leadership Team, and quarterly by the Strategic Board. In addition, TWAM's accounts continue to be audited independently, to further provide evidence that TWAM has adequate financial management systems.

Note: At 31 March, Cash at Bank and Restricted Funds reflect a deposit of £1.7m National Non Domestic Rate refunds received as a result of a favourable rate valuation tribunal decision in November 2020. The Valuation Office has appealed the decision, so the refund is required to be ring fenced in a restricted reserve pending the appeal

decision. The result is not expected to be known for several months, and it is probable not before 31 March 2022.

Reserves Position as at 31 March 2021/22

A Review of Reserves is a key part of TWAM's budget setting process. TWAM holds a number of reserves as part of its approach to prudent resource management. The objectives of TWAM's risk-based reserves strategy are to:

- Be Forward Looking: Hold Designated Funds for specific, known strategic initiatives.
- Deliver funder objectives: TWAM holds Restricted Funds where funders have placed conditions on how TWAM uses the funds.
- Provide Financial Resilience: ensure an adequate level of reserves to cover the financial risks faced by TWAM (e.g. mitigate the impact on the revenue budget of unexpected events or emergencies or uneven cash flows), and provide an element of temporary cover and flexibility which may be used during the year to deliver business as usual.

Having earmarked £100,000 to support TWAM Enterprises with a loan facility, and £100,000 to cover potential legal fees arising from defending the NNDR appeal, the remaining general reserves, that is those not earmarked for specific purposes, are estimated to be approximately £570,000 at the start of 2021/22 and will represent about 7.8% of budgeted expenditure for the year. Of this, it is anticipated £115,000 will be need to support the budget position. Whilst the remainder, £455,000, (6.2%) is slightly below the minimum level that TWAM would prefer to be maintained, using reserves to provide financial resilience in the current unprecedented circumstances is precisely what the reserves are intended to provide.

During the closedown period, a further review of reserves will be undertaken, including an analysis of future needs, risks, future income streams and cost pressures, particularly in light of coronavirus.

Heritage Assets

Heritage assets are assets that are held 'principally for their contribution to knowledge or culture'. Accounting standards require those organisations who hold heritage assets to disclose the value of these assets in their balance sheet. TWAM's legal status does not allow ownership of 'assets', therefore, heritage assets are included in the balance sheets of the local authorities, alongside any other appropriate disclosures required under FRS 102. Assets have been allocated to the local authorities based on the methodology laid out in the Joint Agreement.

TWAM's policy for acquisition, preservation, management and disposal of heritage assets can be referenced on the TWAM website <https://twmuseums.org.uk/files/5029-acquisitions-and-disposal-policy.pdf>

Environmental Commitment

TWAM is committed to environmental sustainability. All 9 TWAM venues hold Creative Green Certification. Six of TWAM's venues have been awarded a 4-star Creative Green rating with a further three achieving 3-stars.

Adapting to challenge

Making the best use of resources is a key priority of TWAM and underpins our aim to deliver services more effectively whilst not compromising on quality.

TWAM's Value for Money (VFM) Strategy sets out a framework for achieving VFM and includes goals for the financial year. TWAM will continue to think creatively and encourage staff to do the same, to ensure that TWAM delivers on its mission and vision.

TWAM's success in continuing to deliver excellent, inclusive work against a background of 59% reduction in local government funding over the last 10 years is strong evidence of its ability to adapt.

TWAM has achieved this by reviewing its governance model, by making efficiency savings, increasing income generation, workforce planning and, where unavoidable, in some areas, reductions in service. In 2019, TWAM undertook an organisational and cultural change programme with the support of Newcastle City Council's Transformation Fund, to ensure it remained resilient and able to deliver the best service possible.

TWAM Enterprises Ltd was established in May 2018. Although it will, by 1 April 2021, be in its fourth financial year, it has yet to have a full trading year. After an 11 month year in 2018-19 both subsequent financial years were significantly impacted by COVID. A strong board with support from shareholders, and from the CRF have allowed the company to continue trading furloughing staff, seeking business support grants and making income wherever possible with Christmas and Valentine's promotions for the online shop. New initiatives planned for 2021-2 include a series of outdoor escape room and socially distanced events as well as the potential for overnight 'museum camps'.

TWAM's Development Trust had its 10th birthday in October 2020 and this was used as the moment for launch of a new Case for Support for TWAM and a new fundraising campaign – the first major unrestricted giving campaign which TWAM has launched. A recruitment campaign led to the appointment of a new Chair and 3 new trustees, all high profile figures with significant experience business and fundraising to support TWAMDT in February 2021.

Exhibitions by TWAM Ltd began trading on 1 September 2020 to manage all exhibition production activities for TWAM and enable TWAM to benefit from Museums & Galleries Exhibition Tax Relief.

TWAM has extensive experience of managing major projects and funding bids across all 9 venues and across its broad range of services (including significant capital investment). We work closely across the TWAM partnership, particularly with the local authorities as owners of venue assets, to ensure that we take a strategic, carefully planned and monitored approach to securing and delivering investment.

We recognise the need to continually improve our performance and processes and to review our operations from time to time as appropriate. In 2020-21 we worked with Black Radley to explore and develop our business models and continue to seek advice to help us develop where appropriate.

Moving towards Lets Create and embedding the Investment Principles

TWAM welcomes Arts Council England's Lets Create strategy for 2020-2030. Its move to an ever great focus on communities and working towards the less engaged is very much in line with our own mission and organisational direction of travel.

The adaptations to the current Business plan for 2021-2 are driven in part by our desire to show how our work contributes to the delivery of this strategy, and in particular to demonstrate our embracing of the four investment principles contained therein.

We recognise the four investment principles (IPs) and their core characteristics as a route to ensuring TWAM is well run and focussed on its programmes, audiences, championing equality/challenging inequality and playing its part in the climate emergency. To ensure the principles are fully embedded in our organisational consciousness we are taking the following steps.

- 1 establishing diagonal slice working groups for each of the IPs of staff from across the organisation (we already have an environmental working group) These will be open to staff with an interest, but include staff with responsibilities relevant to the IP in question. Each will be convened by a member of the Leadership team.

- 2, Board members have volunteered to join the four groups where they will be active champions, ensuring the Board's views are part of the group discussions and championing the IP at Board level.

3. We will take a paper dedicated to the IPs to each Strategic Board meeting. The Board member designated as champion would be invited to respond to the paper.

We envisage these as task and finish groups with, most likely, a two year lifespan, to ensure the IPs are understood, embedded and embraced by March 2023. At that point we will review and see if the groups would continue to have a role going forward.

As an initial step we have grouped our planned activities for 2021-2 (See appendix 6) by the investment principles and, more specifically, by their core characteristics. This action is not meant to imply we have fully embedded the IPs. Far from it, it is an initial step to ensuring they are considered and discussed across our work. We fully accept we may not have the right work streams in the right IPs, and we also believe that future plans may rather be structured around the three priorities of Lets Create. However, we do feel that taking this approach with the 2021-2 plan will be an important step forward in ensuring the organisation reflects on, explores, understands, and embeds the IPs in its consciousness.

Outline evidence and data sets for embedding IPs

The foundation for embedding the IPs will need to be data driven. A key role for our IP groups will be to identify the data and measures they will need to set performance targets for TWAM. Our initial thoughts on what we will require are:

A. Ambition and Quality

- Footfall
- Digital reach and engagement
- Engagement with Digital Must-see Stories programme
- Arts Council Insights surveys for every exhibition and major event – quality metrics for programming
- Must-see museums membership – new members
- Quarterly benchmarking surveys to understand demographics, interests and satisfaction

B. Dynamism

- Quarterly benchmarking surveys – to understand satisfaction / what can be improved
- Contributed income raised
- Income generated by TWAM Enterprises
- Staff satisfaction – staff survey
- Staff satisfaction - sickness levels
- Staff digital skills review to assess improvement in digital literacy
- staff skills/training survey and records

C. Environment

- Utilities data – is usage going down? Carbon footprint assessment
- Number of staff training sessions in environmental responsibility
- Staff survey – to assess staff understanding of TWAM's environmental responsibilities – to include working from home/travel preferences
- Audience perception re. TWAM's environmental sustainability – add to benchmarking survey
- Number of exhibitions / events promoting Climate Change issues (and monitoring social media posts etc on environmental issues)
- review procurement processes
- travel data for staff and transport costs for exhibitions

D. Inclusivity and Relevance

- Percentage of protected characteristics visiting venues (age, sex, gender, race, socio-economic group, disability)
- Number of digital programmes engaging audiences with protected characteristics
- Exhibitions embracing the Creative Case for Diversity – number and quality metric feedback (including peer reviews from those communities)
- annual audit of creative/freelancers we work with to deliver our programmes
- Number of collections records with information added re. Protected characteristics
- Workforce data re. Protected characteristics and targets for increasing representation.
- Recruitment data – who applies, who gets to interview, who gets selected
- Number of volunteers
- Percentage of volunteers with protected characteristics
- feedback from community consultation groups
- Number of outreach engagements with communities

- School engagements / visits (frequency and depth of engagement of individual schools and protected characteristics and socio economic indicators for each school)
- Local Authority data sets

Equality, Diversity and the Creative Case

TWAM's mission is rooted in our commitment to equality and diversity, and TWAM 3.0 – is focused on drawing strength from the diversity of our venues, collections, staff, audiences and producers.

We have been on an equalities journey for well over two decades, and have our Museum and Galleries Disabled Access group (MAGDAG) and consultation forums and engagement programmes focussed on various of the protected characteristics. We are rated strong for our Creative Case for Diversity work which is discussed at each Board meeting, and all exhibitions are reviewed in terms of their potential contribution to our Creative Case work.

Our equality aspirations are:

- Embracing, embedding and disseminating the principles of the Creative Case for Diversity.
- Increasing the diversity of our staff, volunteers and service users.
- Promoting our services to diverse networks so people feel inspired, included and are able to engage independently with TWAM venues and services where possible and/or or appropriate.
- Improving the access to existing TWAM universal services and opportunities, thus reducing the need for additional provision, whilst ensuring that high quality alternative services are available where this best meets service user needs.
- Monitoring and updating the equality and diversity training programme for staff to ensure a high level of customer care is delivered across all TWAM venues where the public expectations are met and exceeded.

TWAM had just embarked on its review of its Diversity, Equality and Access policy when lockdown began. The Black Lives Matter movement (TWAM is signed up to the North East Culture Sector anti-racism statement) has given this process added impetus.

A survey of staff has been carried out to get their views across the topics of workforce, collections, audiences and systems. The survey saw responses from 21% of the workforce, with people taking on average 58 minutes to complete the survey. Without exception the responses were incredibly thoughtful and detailed with clear messaging about how the organisation might change in order to help address some of the issues we know we face when responding to and challenging inequalities.

We currently have five task and finish working groups developing recommendations for further work which are being fed into TWAMs planning. They are:

- Audiences
- Interpretation
- Collections
- Workforce
- Learning and engagement
-

Final reports from these groups are due shortly, but emerging next steps include (but see next section for workforce diversification):

- Develop and communicate principles for working with community partners that set out what can be expected of us and what we aim to achieve
- Develop methodologies for monitoring our work across these areas to ensure we are taking all relevant opportunities to represent and engage with communities and individuals with protected characteristics
- Develop a research methodology to understand who we aren't reaching, to inform and develop strategies for each venue to target underrepresented audiences in their community
- Undertake a communications audit regarding our reach to diverse audiences (language used/channels/TWAM voice)
- Review of collecting policies and processes including implementation of protected characteristics tagging on our EMU system to ensure our collections and the information we hold become ever more representative of and relevant to the diversity of communities in our region..

It cannot be stated enough that we see our diversity, equality and anti racism work as absolutely core to our activity as an organisation. The details of the work we are planning to undertake are set out in the relevant sections of the activity plan (see appendix 6) we are determined to build on our work to date, and do ever better.

Workforce Diversity

90.62 % of our workforce are non BAME (5.35% prefer not to say and 4% are BAME. The North East has the highest percentage of white British people 93.6% (2011 census).

However, this situation is rapidly changing. For example 34.1% of children in primary schools in Newcastle upon Tyne are from minority ethnic groups. We believe that we have a duty to be relevant to and engage with all the communities we serve, and to ensure our workforce reflects those communities. Clearly we need to take steps to meet this generational change now.

There is a continuing need to reach out and ensure people from all walks of life (but particularly those with protected characteristics including lower economic status) are aware of the range of potential careers in our sector, be that as employees or self-employed artists/freelancers (a category we need to further support, develop and diversify as the nature of the workplace changes).

Our work to take forward TWAM 3.0 and to strengthen and embed our commitment to equalities further recognises our organisational desire to diversify our workforce (paid and voluntary). We have strengthened our commitment to workforce diversification as part of our pledge to become an anti racist organisation as part of the North East Culture Against Racism movement.

The details of our approaches for this are set out in section the activity plan at appendix 6 below and will include us:

- reviewing demographic data and setting targets for future recruitment
- reviewing our recruitment, HR and other systems to root out any systemic racism
- supporting initiatives designed to diversify the sector's workforce such as the Culture&/New Museum School postgraduate placement programme.
- Working with partners such as Beacon films to develop bespoke recruitment processes that take account of people's different needs.

Audience development

This year audience development strategies will be about adapting to the impact of the Covid-19 pandemic on people's behaviour, confidence and wellbeing.

We will build upon work before and during the pandemic to embed a culture of audience consultation and agency to enable us to respond to local issues and develop our understanding of the diverse needs of our audiences.

We are committed to being responsive to social, economic and cultural trends and building representation of our communities into our audience development planning and programming and this feels even more important in the current climate. Central to this is ensuring that the principles of the Creative Case for Diversity are truly embedded in our work. We will look outwardly to wider society and not just at our existing visitors.

For example In the North East 31% of neighbourhoods are deprived compared to an average of 20% in England and in South Tyneside (where two of TWAM's venues are based) 46% of neighbourhoods are classed as deprived.

The region is also becoming more ethnically diverse - in 2001 4% of the North East population were BAMER and this increased to 7% in 2011. In areas such as Newcastle this increase is significantly more rapid.

Through our community health and social care programme we will work with health and social care professionals and academics to research and develop targeted interventions

and resources with proven clinical and care outcomes. We will not only engage people who would not usually visit museums and galleries but we will ensure that by engaging we improve their quality of life.

We will use active research in our programme development allowing for flexibility and feedback. We will use Culture Counts along with our benchmarking research and digital analytics tools to provide a benchmark and framework, for self-reflection and peer and audience feedback to fuel development of our programmes.

In the context of the challenging funding climate we will explore new ways to generate income, whilst social distancing makes traditional routes challenging. This has an impact on audience development as increasingly there is a necessity to charge for services and to target audiences who will pay for those services.

However, TWAM remains committed to offering free access to core collections and venues (excluding adult visitors at Segedunum) and to providing opportunities for all. Audiences will always be at the centre of our work and being financially resilient means we can continue to deliver a world class museum and archive service for everyone.

In order to achieve this we will develop the following work packages:

Programming: ensuring our programme (exhibitions, events and activities) is layered to target a range of audiences and provides opportunities for meeting the needs of specific audiences (for example roll out of the 'Slow Museums' programme, relaxed sessions for SEND children etc). Key to achieving this will be embracing of the principles of the Creative Case for Diversity.

Digital: as a result of the pandemic the importance of digital engagement has been accelerated. We will develop compelling digital stories from our collections and communities using formats and platforms that are familiar to audiences. Building on the work we have begun with Must-see Stories: <https://stories.twmuseums.org.uk/>.

Communications: ensuring we are reaching as wide, yet appropriately targeted, an audience as possible, taking into account different communication needs and formats as well as messages. We will develop integrated marketing activity promoting the individual venue brands, using traditional platforms (above and below the line) but with a strong emphasis on digital communications (including Facebook, Twitter, Instagram and our own Must-see museums membership scheme). We will also ensure that our communications are accessible and available in varied formats as appropriate.

Community engagement: targeting specific non-traditional audiences (often therefore non-engagers) to work with them to enable them to see museums and archives as having a positive contribution to make to their lives. This work is conducted with community partners, healthcare professionals and academics to embed development of programmes and practice in research.

Equalities: engaging with audiences with protected characteristics (specifically BAME audiences, Disabled audiences and lower socio economic status (C2DE) audiences) to ensure that the work we produce is meaningful and relevant and that our provision does not in any way discriminate against their attendance.

Learning: working with Children and Young people (C&YP) – both via informal and formal learning (schools) to ensure that our work is appropriate to the learning and developmental needs of C&YP (including programmes aimed at children and families and activities for young people as independent learners, engaged collaborators, enthusiastic volunteers and visitors to our venues). Over the coming year this will be approached as a hybrid model of physical visits and a digital offer.

Partnerships and Leadership

TWAM is itself a partnership organisation and is constituted as a joint service between the four Tyneside local authorities with a very important relationship with Newcastle University in terms of managing the Great North Museum: Hancock and the Hatton Gallery. This partnership approach lies at the heart of everything we do. We work to the following definition of a partnership:

“A relationship between two or more independent organisations which is based on trust, openness and honesty and where the parties are working together in a mutually agreed way to achieve agreed outcomes based on their key objectives, which they believe they cannot reasonably achieve alone.”

In addition to our funding relationships with key stakeholders: local authorities, Newcastle University, Arts Council, which are addressed elsewhere in this Business Plan, we will continue to build on established partnerships across a number of different sectors to support our work, support the sector, and enhance services for our users and stakeholders whilst also seeking to develop new relationships.

These sectors include:

NELEP and Combined Authorities: we will work to support the Strategic Economic Plan, in particular through the skills agenda and the Industrial Strategy. We will support the work of the North of Tyne Combined Authority and the North East Combined Authority.

Business: we will seek to increase business engagement with TWAM, through our active engagement of established business networks including the North East Chamber of Commerce, Newcastle Gateshead Initiative, Durham Business Group and NE1 Bid to name a few. This activity will be supported through capitalising on the networks of our Board Members and through building on the existing formal partnerships with our Business Partnership scheme. This scheme provides a range of benefits to businesses ranging from bespoke arrangements which include venue hire, access to spaces, expertise & profile-raising opportunities. This is in return for both in-kind and cash contributions from the business. We also partner businesses on initiatives such as sponsorship of events, exhibitions and activities and will be building on our refreshed business engagement events pre covid 2018 -2020 to establish our business networking events back at venues over the later part of the period 2021-22 and beyond.

Local/regional cultural partners: As an organisation, we work alongside nine other partners to promote Tyneside's cultural visitor attractions, known collectively

as NewcastleGateshead Cultural Venues (NGCV). NGCV is a collaboration between 10 building-based cultural producers operating 20 venues across visual arts, performing arts, music, dance, film, writing and literature, heritage, archives and museums and science communication in North East England. TWAM operates ERIC (Environmental Records Information Centre) on behalf of a consortium of environmental partners across the region. TWAM chairs the Hadrian's Wall 1900th anniversary festival which will take place in 2022. Assuming Covid restrictions are over, TWAM will continue to lead The Late Shows in May 2022, one of the country's most popular and most successful 'Museums at Night' events. We Chair the North East Family Arts Network and Family Explorers Steering group – connecting families with cultural venues and activities across the region and sharing best practice in engaging with a diverse family audience. Each of our venues has a partner school to ensure our Learning programmes for Children and Young People truly support their educational development.

National partnerships: TWAM has a number of strong relationships with national museums and analogue bodies, particularly: British Library, British Museum, Natural History Museum, National Portrait Gallery, Science Museum and Tate. These relationships deliver partner galleries, loans, shared exhibitions, learning and development programmes and skills exchange. TWAM also has a benchmarking relationship with Bristol and Birmingham Museums. We will be building on these existing relationships to support learning and loans whilst also seeking new relationships. TWAM is a member of NMDC and the English Civic Museums Network. TWAM is also sharing data with a network of civic museums and with a small group of independent museums to improve service.

Friends and Associates. TWAM has 10 'friends and affiliate groups, all third sector organisations, whose primary purpose is to support individual venues or collections (in some cases these bodies actually own buildings/collections). They provide an invaluable support network for TWAM which includes financial support and practical contributions ranging from guided tours to exhibit maintenance and the operation of a passenger steam railway. These groups provide increasingly important practical and financial support and we will be working closely with them to support them to return to strength following Covid.

Appendix 5 lists current regional and national leadership roles undertaken by TWAM.

International Working

The Covid crisis has of course severely curtailed international working. TWAM had significantly expanded its international working in the run up to 2020 and we intend to continue to expand in this area as the world emerges from the pandemic

We identify four key areas in our international activity:

Workforce development. Our international projects create excellent opportunities to allow our staff to gain a wider experience of the museum sector and to develop skills in projects that lie outside the regular TWAM footprint. E.g. 2021 will see the culmination

of our Erasmus funded partnership exploring the interface between museums and vocational training at the FE level which has engaged many of our learning team

1. Sector support: a key focus for our international activity is on the training of international colleagues and partnership working to develop museological practices (e.g. supporting the British Museum's International Training Programme).
2. Revenue Generation: Our international training programmes support the generation of income which contributes to TWAMs core costs (e.g. delivery of courses in audience development, partnerships and museum enterprise for the British Council in the Balkans, Brazil, China and Greece) We aim to develop these further as opportunities arise.
3. Increased Quality: the quality of our research, exhibition and engagement programmes is enhanced by collaboration with international colleagues (e.g. via our partnership with PUCRS University Museum in Brazil).

For 2021-22 Key activity will include:

- Continued support for the British Museum International Training Programme
- Support for the Hadrian's Wall/Great Wall of China 'Wall to Wall' programme with the aim of producing exhibitions and associated engagement programmes that will operating in both China and the UK (this project includes the University of Newcastle, Historic England and Tullie House Museum and as UK project partners). This year will see presentation at online conferences and seminars, with face to face meetings in planning for future years.
- Exploration of further partnership with PUCRS.
- Continued offering of longer term placements to colleagues from abroad within TWAM.
- Exploration of links to Sweden (and potentially other countries) arising from the Lindisfarne gospels exhibition at the Laing in 2022.
- Continued commitment to strengthen links with the wider Frontiers of the Roman Empire World Heritage Site, not least as part of the Hadrian's Wall 1900 festival.
- Exploration of the potential for our digital programming to engage targeted international audiences (eg Rothschild lectures at the Shipley).

Economic Impact

Impacts

The total (direct, indirect and induced) Gross economic contribution of Tyne & Wear Archives & Museums to the North East region was estimated at £10.5m of GVA during 2017-18, supporting 235 FTE jobs. This figure was calculated from the following analysis:

Direct Impact:

- A total of 124 FTE positions were occupied by North East residents at the venue with direct GVA equal to £4.7m

Indirect Impacts:

- Tyne and Wear Museums had a procurement spend of £4.5m within the North East Region.

- This procurement spend supported 34 FTE jobs within the region with a GVA impact of £2.7m

Induced Impacts:

- The direct and indirect impacts above induced a further 28 FTE positions within the region through additional spending in the economy. These induced impacts were worth £1.5m in regional GVA.

Visitor Impacts:

- Tyne and Wear Museums' total gross impact on the regional visitor economy equalled 164 FTE job and £5.6m GVA.

Wider Impacts:

- 798 volunteers contributed 43,983 hours of support to the organisation

- 192,452 learning and participation engagements were facilitated with 137,244 children and young people and 55,208 adults

(Economic Impact is based on work carried out by ERS – ers.org.uk).

Principal Risks, Management and Mitigation

Going concern

The financial statements have been prepared on a going concern basis.

TWAM's forecasts and projections for the next twelve months show that TWAM should be able to continue in operational existence for that period, taking into account reasonable possible changes in trading performance and the potential impact on the business of possible future scenarios arising from the impact of COVID-19. This also considers the effectiveness of available measures to assist in mitigating the impact. TWAM Strategic Boards assessment of possible changes they have considered a fall in demand and potential cost savings which are reflective of their business continuity plan.

Whilst the budgetary situation continues to change on an almost daily; forecasts are based on best estimates & latest guidance.

The business plan for 2021/22 builds in this flexible approach & includes the risk of consumers being slower to return to cultural venues/activities within the risk analysis. Risks are identified by a 'risk radar' approach undertaken by the Leadership Team and monitored and challenged by TWAM Enterprises Board, Audit Committee and Strategic Board.

To ensure viability we will use:

- Close monitoring of income/expenditure/footfall
- Adapting opening times/seasonally closing some venues
- Stopping recruitment of non-essential posts & non-essential spending
- Scrutiny BY Audit Committee & Boards

Risks are managed via COVID specific and strategic risk registers and using:

- Previous experience & lessons learned during lockdowns in the event of further lockdowns
- TWAM planning sub group enables quick response to change
- Careful monitoring of cash flow & active management of expenditure & staffing
- Continue to explore diversification of funding sources

Throughout the pandemic we have listened, learnt and responded to partners and communities. For example, developing relevant and engaging online content for schools, families, students, adults, educators, health professionals and older people delivered over social media, by email, live streamed, blended learning and downloadable resources; this will continue.

The cash flow projections will be further improved if an application to Arts Council England Cultural Recovery Fund Round two is successful, but TWAM's continued going concern is not dependent on this outcome.

Although the forecast prepared takes account of the matters above to support the ability of TWAM to remain a going concern and to be able to trade and meet its debts as they fall due, the full impact of COVID-19, the continued level of government support and the underlying assumptions used in forecasting are judgemental and difficult to predict and could be subject to variation.

Based on the factors set out above, TWAM Strategic Board believe that it remains appropriate to prepare the financial statements on a going concern basis.

Internal control

The Strategic Board are responsible for ensuring that there are effective and adequate risk management and internal control systems in place to manage the strategic and operational risks TWAM has and could be exposed to.

Processes in place regarding risk management and internal controls include the following:

- A Risk Management Framework;
- An Internal Audit function provided by our lead authority Newcastle City Council;
- The Audit Committee review how and whether TWAM management have followed up on internal audit recommendations. Audit Committee also reviews more detailed reports from senior management on key areas of risk;

- Specific risk management procedures are put in place for all major projects and significant partnerships.

Major risks and management of those risks

The Strategic Board is responsible for ensuring that there are effective and adequate risk management and internal control systems in place to manage the strategic and operational risks TWAM has and could be exposed to.

Processes in place regarding risk management and internal controls include the following:

- A Risk Management Framework;
- An Internal Audit function provided by the lead authority Newcastle City Council;
- The Audit Committee, which reviews how and whether TWAM management has followed up on internal audit recommendations. Audit Committee also reviews more detailed reports from senior management on key areas of risk;
- Specific risk management procedures are put in place for all major projects and significant partnerships.

Risk Register

As of March 2021, there are 15 risks on the strategic risk register, of which 8 are evaluated as having a residual rating of medium (Amber) and 7 as low (Green). Overall risk scores have remained static during 2019/20 as controls have been assessed as operating to the extent that either the likelihood of the risk occurring, or its impact on the organisation is low, and therefore the risks are being managed within accepted tolerances.

One new risk was added in 2019/20: 'Ongoing or New pandemic impacts on TWAM's ability to operate services'.

Risk reference	Risk Description	Status	Risk score
SR0001	Major incident at a TWAM venue		static
SR0022	Failure to maintain the health safety and wellbeing of public/ workforce / customers/ clients.		static
SR0032 / SR0042	Failure to sustain a robust 5 year financial strategy due to CSR, Brexit, ACE 10 year strategy and ongoing public sector budget pressures.		static
SR0034	TWAM is unable to deliver the 2020/21 agreed budget due to failure to achieve income targets or manage expenditure		static
SR0035	Fraud, financial impropriety or improper business practices increase as internal controls are weakened as resources become severely stretched		static

SR0038	Failure to deliver successful 'Bridge' programme and Museum Development Programme for North East 2018-2022		static
SR0043	Impact on staff resilience (stress and motivation) of organisational change & budget reductions		static
SR0046	Data Protection failure		static
SR0047	Fundraising strategy fails to deliver significant increase in contributed income included in Business Plan 2018 - 2022		static
SR0048	TWAM Enterprises fails to deliver predicted profit and to maintain positive mutual relationship with TWAM		static
SR0049	Failure to manage the complexity of TWAM's new Governance arrangements		static
SR0050	Failure to successfully exploit the MGETR following creation of Exhibitions by TWAM		static
SR0051	Reducing R&M budgets lead to catastrophic building failure		static
SR0052	Blandford House project fails to deliver successful plan for redevelopment		static
SR0053	Ongoing or new pandemic impacts on TWAM's ability to operate services.		New

Given the significance of risk SR0053, a separate Covid-19 risk register has been developed for review by the Board.

There are currently 9 risks on the Covid-19 risk register, of which 2 are evaluated as having a residual rating of medium (Amber) and 7 as low (Green).

Risk reference	Risk Description	Status
CRV001	Building Closures - Local or national lockdown impacts on TWAM's business continuity resulting in inability to perform critical functions	
CRV002	Ongoing need for many staff to continue to work from home, affecting health and wellbeing and productivity	
CRV004	ICT - Lack of equipment / infrastructure / knowledge	
CRV005	Recruitment and induction process during continued periods of social distancing	
CRV006	Failure to maintain the health safety and wellbeing of workforce	
CRV007	TWAM Enterprises forced into administration due to lack of income as a result of building closures / public social distancing and/or economic downturn	
CRV008	TWAM is unable to deliver the agreed balanced budget 2020/21 due to lack of income and / or increased cost pressures as a result of building closures / public social distancing and/or economic downturn	
CRV009	TWAM does not adapt to changes in the way culture is consumed in post Covid-19 society	
CRV010	Re-opening – TWAM fails to adequately prepare for new patterns of visiting and visitor behaviour after reopening	

Quality and evaluation

In order to ensure quality across our diverse venues and programmes we utilise a range of evaluation methods to ensure we have up to date reliable performance information.

Evidence suggests that we have better, and more rigorous data, more readily available than comparable organisations and this is used effectively to monitor progress and to respond. Our benchmarking relationship with Bristol and Birmingham museums provide a useful comparison and challenge process.

We understand the importance of monitoring and evaluating the service that we provide to our audiences, listening to critical comment and working collaboratively with communities to shape our offer. We achieve this through a number of different approaches:

- As a legacy of the Paul Hamlyn funded Our Museum programme we aim to ensure consistent engagement of local people in shaping and delivering our services and an ongoing two-way dialogue between TWAM and our communities and stakeholders.
- Performance data including visitor numbers and learning and outreach engagements.
- We have audience development plans for every venue which set out the audiences we will engage and the strategies to deliver this including programming (in venue and digital) and targeted interventions (outreach and offers tailored for specific audience needs e.g. SEND children). These plans also set out how we will measure quality and success.
- Our Must-see Museums membership scheme (24,000+ members) provides rich data about our audiences and the opportunity to influence their visiting behaviour.
- We will use Culture Counts along with our benchmarking research and digital analytics tools to provide a benchmark and framework, for self-reflection and peer and audience feedback to fuel development of our programmes.
- We use Audience Finder to conduct quarterly audience benchmarking surveys at our nine venues to gauge trends in audience demographics, assess satisfaction and benchmark against other cultural venues.
- We have social media channels for our venues on Facebook, twitter and instagram. We are active on these channels engaging with audiences, monitoring feedback and responding to positive and negative comments.
- Our community engagement programme has established a user group including mental health service users, people in addiction and justice recovery and older people, who will feed back on our programmes to ensure they are relevant.

Our approach is based on best use of both qualitative and quantitative measures, recognising the reductive nature of some of the quantitative indicators. The Quality Metrics framework looks at 6 qualitative measures and TWAM will work to use these as pointers to quality measurement across our programme.

- quality of product
- quality of experience
- quality & depth of engagement
- quality of creative process
- quality of cultural leadership
- quality of relationships & partnerships

Ultimately we will use the above techniques and programmes to ensure we understand both what our work is delivering and the needs of our audiences and stakeholders in order to ensure we can increase the quality and relevance of our work going forward.

Appendices

Appendix 1 - Stakeholders' priorities

ACE	Lets Create create	<p>Guided by four investment principles:</p> <ul style="list-style-type: none"> Dynamism Environmental Responsibility Inclusivity & Relevance Cultural Communities <p>The Strategy sets out how investment in cultural organisations will achieve the following outcomes:</p> <ul style="list-style-type: none"> Creative People Cultural Communities A Creative & Cultural Country
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Local Authorities:

Newcastle	<ul style="list-style-type: none"> • Employment: supporting recovery through more and better jobs • Education and skills: the best learning opportunities for all • Environment: a learn, green and safe Newcastle • Health and social care: a heathy, caring city • Housing: building more and better homes • Transforming public services <p>Build Forward Better - our medium-term plan for 2021-22 and 2022-23 0.pdf (newcastle.gov.uk)</p>						
Gateshead	<ul style="list-style-type: none"> • Putting people and families at the heart of everything we do • Tackling inequalities, so people have a fair chance • Supporting our communities to support themselves and each other • Investing in our economy to provide sustainable opportunities for employment, innovation and growth • Working together and fighting for a better future for Gateshead <p>https://www.gateshead.gov.uk/article/11956/Thrive-our-strategic-approach</p>						
North Tyneside	<ul style="list-style-type: none"> • Our People • Our Places • Our Economy <p>Our North Tyneside Plan North Tyneside Council</p>						
South Tyneside	<table border="1"> <tr> <td>Better Education and Skills</td> <td>A Regenerated South Tyneside with Increased Business and Jobs</td> </tr> <tr> <td>Increasing Prosperity</td> <td>Better Transport</td> </tr> <tr> <td>Protect Children and Vulnerable Adults</td> <td>Better Housing and Neighbourhoods</td> </tr> </table>	Better Education and Skills	A Regenerated South Tyneside with Increased Business and Jobs	Increasing Prosperity	Better Transport	Protect Children and Vulnerable Adults	Better Housing and Neighbourhoods
Better Education and Skills	A Regenerated South Tyneside with Increased Business and Jobs						
Increasing Prosperity	Better Transport						
Protect Children and Vulnerable Adults	Better Housing and Neighbourhoods						

	Strong and Independent Families	A Clean and Green Environment	
	Healthier People	Less Crime and Safer Communities	
https://www.southtyneside.gov.uk/article/38522/The-South-Tyneside-Vision			
Newcastle University	https://www.ncl.ac.uk/who-we-are/strengths/ Strengths: Ageing and Health Cities and Place Culture and Creative Arts One Planet Data Additional centres of excellence include Heritage https://www.ncl.ac.uk/who-we-are/research-strategy/nucores/		

Appendix 2 Museum Development North East themes

The Museum Development North East Programme is planning to address the following themes for the sector over 2021-2

- Supporting museums to strengthen governance (partly in the light of the Covid experience);
- Supporting museums with financial management, real time risk assessment and presentation of data and financial information for funding applications;
- Developing cooperative working between museums to address capacity, skills and resource issues;
- Addressing volunteer recruitment and development challenges and building improved links to wider communities as part of this;
- Developing museums as key components of local places;
- Developing Equality Diversity Inclusion (EDI) agendas across the North East, engaging museums with this conversation and providing frameworks to realise improved practice and lasting change;
- Capitalising on digital agendas following on from the Covid experience;
- Building partnership between NPOs, English Heritage, National Trust sites and the wider sector;
- Building partnerships beyond the museum sector, including with universities and community-based agencies;
- Developing museums' active engagement with environmental agendas;

The work packages associated with this have been structured around ACE's Investment Principles

See also Museum Development North East Programme Plan 2021-22

Appendix 3 Bridge Objectives – by Programme area

Three priority areas have been identified for the 2021/22 activity plan:

1. Place-based work
2. Cultural sector support
3. Education sector support

The work packages for 2021-2 are set out against the three outcomes of the Lets Create strategy.

Objective 1 Creative People - Deliverables

- Support Artsmark delivery in area
- Support schools, cultural organisations, and individual artists/practitioners to access information, advice, learning, tools, approaches, and activity, enabling equitable opportunity for all children and young people

Objective 2 Cultural Communities - Deliverables

Support the ongoing development of a vibrant, cohesive, and responsive cultural education infrastructure in order to support equitable opportunities for children and young people. This objective fits with Priority 1 Place Based and links to wider work identified in the plan.

Objective 3 Cultural and Creative Country - The Bridge network is a significant resource that CBNE both draws on and contributes to. Our working together has been accelerated by the need to respond to the Covid-19 situation, and will be significant in our ability to deliver on the Cultural and Creative Country objective of Lets Create.

See also Culture Bridge North East Activity plan 2021-22.

Appendix 4 TWAM Venues

TWAM venues are:

Venue	Funder & Owner
Shipleigh Art Gallery (founded 1915)	Gateshead Council
Discovery Museum (founded 1934) Laing Art Gallery (founded 1901)	Newcastle City Council
Segedunum Roman Fort, Baths & Museum (founded 2000) Stephenson Railway Museum (founded 1986)	North Tyneside Council
South Shields Museum & Art Gallery (founded 1876) Arbeia Roman Fort & Museum (founded 1953)	South Tyneside Council
Great North Museum: Hancock (founded 1829) Hatton Gallery (founded 1926)	Newcastle University
Tyne and Wear Archives (based at Discovery Museum, est. 1974)	Five councils in Tyne & Wear

Appendix 5 TWAM and sector leadership

TWAM has a specific Aim in this area:

D: Lead by example and work as a catalyst through partnerships, regionally nationally and internationally.

We aspire to take a key role in supporting the wider sector to come together to achieve excellence through partnership. This can be seen in our delivery of two sector support organisations for the region (Culture Bridge North East and Museum Development North East). We see sharing of expertise, wherever it originates, as vital for the long term health of culture in the North East and enjoy facilitating this. As we are non-art form specific we are often able to be a more neutral facilitator of the sharing of best practice across the sector to ensure quality is driven up for audiences.

The following is a list of regional, supra regional, and national forums/programmes on which our staff have positions (this list is distinct from partnership projects):

Sub regional/Regional

North East Historic Environment Forum

Creative Fuse Steering Group

North East Cultural Partnership – Board member also engaged with International sub-group, Cultural co-ordinators sub group, Children and Young People sub-group (TWAM provides secretariat here)

The Late Shows – programme Chair and secretariat

North East Family Arts Network / Family Explorers – Chair

Newcastle Gateshead Cultural Venues (NGCV)

NGCV Communications Group - Chair

NGCV L&P Group – Co-Convenor

ERIC (Environmental Records Information Centre) – operated by TWAM on behalf of a consortium of Environmental Partners across the region.

Newcastle Cultural Compact group members ‘place and meaning’ and ‘cultural democracy’ working groups

Arts advisory board for Newcastle Cathedral – member

Gateshead Local Cultural Education partnership - chair

Supra Regional

Creative Case North Consortium – TWAM provides secretariat

Wall to Wall project group (group to strengthen relations between Hadrian’s Wall and Great Wall of China World Heritage Sites)

Hadrian’s Wall World Heritage Site Management Plan Committee (and Chair of the Learning and Interpretation sub-group, and 1900 festival working group)

National

Culture Health and Wellbeing Alliance (NE Rep)

English Civic Museums Network Steering Group

National Museum Directors Council

Migration Museum Network Member

In addition our staff are Museum Mentors for a number of smaller Museums including the Bowes Railway Museum, and sit on various community and Museum boards including:

- Senhouse Museum Trust (Cumbria)
- Outer West Schools Trust
- Ouseburn Learning Trust
- Road to Recovery Trust
- National Museum of the Royal Navy: Hartlepool

Subject Specialist Networks

TWAM is committed to working with SSNs as necessary. We recognise that individual SSNs will ebb and flow in their work according to needs, personal and budgets. Wherever possible we will endeavour to support their work, e.g. by providing staff capacity, collections information, rooms for meetings etc.

We currently have a number of staff on committee of SSNs. We actively encourage our staff to take on such roles as part of our responsibility to both their personal development and to supporting the museum sector more generally.

Subject Specialist Network	TWAM staff member specific role
GEM NE	TWAM Assistant Learning Officer is regional convenor
British Art Network	TWAM Art staff member of steering panel
Social History Curators Group	TWAM history staff member on committee
Understanding British Portraits	TWAM Art staff member of steering panel

Sector Support Organisations

TWAM manages two sector support organisations (SSOs) for the Bridge and Museum Development programmes in the North East. Specifically as TWAM we work with a number of sector relevant SSOs to ensure that our audiences gain from their expertise, and that we are supporting them to disseminate their programmes and experience in the region.

SSO	TWAM specific involvement
Arts Marketing Association	TWAM is a group member
Culture 24	Digital and Communications staff are part of the Let's Get Real research project
Kids in Museums	Support for case studies and takeover days
University Museums Group	TWAM Staff member is committee member

In addition we have agreed to work with the Bridge and Museum Development networks over 2021-2 to develop and test a sharing protocol to ensure each network can learn from, and as appropriate dovetail with, the other.

Appendix 6 Tyne & Wear Archives & Museums- Activity Plan 2021-2

Introduction

Recognising the volatile nature of the year gone by, and the potential for ‘bumps in the road’ in the year ahead, this plan, drawn from the venue and team plans for the organisation, is a summary of key activity across public programming, with our other work set out according to our current understanding of their relationship to ACE’s Investment Principles (see page 18 of the Business Plan for context for this). Where we can assign work to specific quarters this is set out in the relevant tables.

Public Programming

The core of TWAM’s public offer is in our programming, in particular, our exhibitions, events, and school workshops, whether in person or online.

Our programme work speaks across all the Investment Principles (IP), in particular Ambition and Quality as it is the ongoing development of our offer that demonstrates our desire to continue to innovate and ensure a fresh, engaging, programme. With our commitment to the communities we serve, our programming also speaks strongly to inclusivity and relevance, and we will use our programming to engage people with the pressing environmental issues. Finally our programming, and its flexibility and responsiveness, sits at the heart of our overall business model, ensuring we demonstrate our relevance in order to attract the support we will need from stakeholders, funders and the public for our work to continue.

The tables below set out some of our key programming for 2021-2. At the present time we are assuming we will be able to open venues to the public as of 17th May, but accept this cannot be confirmed. To that end the information below is provided as an indication of our programming work, it is subject to change but is offered as a demonstration of our general core output for the year.

Exhibitions

A set piece in much of our schedule is the temporary exhibitions programme. The exhibitions listed below (their position in the calendar refers to their proposed opening date) Individual exhibitions respond to various of the IPs – and will be discussed there as appropriate.

Given the nature of the year we would envisage some smaller scale more responsive exhibitions developed around specific need, not least with regards inclusivity and relevance, these of course cannot be listed yet and would be in addition to the schedule set out below:

2021-2	Exhibition openings timetable
Apr-Jun 21	<ul style="list-style-type: none"> • Take a closer look – Segedunum at 21. • Sheila from Shields – South Shields • Flesh on the Bones – Arbeia • Challenging Convention – Laing • New Perspectives – Laing • Mike Silva new acquisitions – Laing • WOW – women only works on paper – Laing

	<ul style="list-style-type: none"> • Other Worlds: The Art of Atomhawk (last chance to see)
Jul-Sept 21	<ul style="list-style-type: none"> • Chris Killip – The Last Ships - Laing • Portrait of an Artist - Laing • Expanded Interiors restaged - Hatton • Making Waves – Discovery • Northern Pride – Discovery
Oct-Dec 21	<ul style="list-style-type: none"> • Obscurum-Lux – Segedunum • Tyne & Tide South Shields • Print goes Pop – Hatton
Jan-Mar 22	<ul style="list-style-type: none"> • Watercolours – Laing • The ignorant Art School - Hatton

School/ Children and Young People engagement

Facilitated School visits are traditionally a key element of our term time offer. We recognise that this year will see (hopefully) a slow return of schools as they, and society in general regain confidence to make visits. However, we do not underestimate the task ahead, with schools facing pressure to focus on achievement, and issues around the mental wellbeing of children and young people we recognise that we will be taking a flexible and thoughtful approach to our engagement with, and offer to, schools, working to ensure that what we offer is what they need. To achieve this we will work with our partner schools and draw on our work with the Tyneside Local Cultural Education Partnerships.

We are also developing work about 'Play' that will enable teams to creatively programme socially distanced activity that encourages intergenerational curiosity and creative exploration of our venues and collections. We are currently exploring ways that this could link into the government proposals for summer schools.

We will continue to deliver Arts Award across all our settings, not least in a collaboration between the Laing and Hatton Art Galleries, using them as a sustainable informal progression route through to and including gold. In addition, we will continue to support schools on their Artsmark journey.

We will continue to offer CPD for teachers and support networks, such as PATERN (Primary Art Teachers and Education Network) at the Laing. and to link schools together through the funded Linking Schools programme.

2021-2	
Apr-Jun 21	<ul style="list-style-type: none"> • Where have all the animals gone? schools exhibit GNM • Art Bites – collections resource programme – Laing • Little inventors SEND schools project – Shipley • Science Works 2021 – Discovery/Archives • online STEM careers fair – Discovery/Archives
Jul-Sept 21	<ul style="list-style-type: none"> • Pilot self led digital trails for schools – Segedunum, Arbeia • Articulate launch – Laing

	<ul style="list-style-type: none"> • Support summer schools programmes eg Science summer clubs Discovery • Where have all the animals gone? Supporting Schools conference GNM
Oct-Dec 21	<ul style="list-style-type: none"> • Uniformed groups day – Discovery • Tiny Sparks under 5s offer – Discovery
Jan-Mar 22	<ul style="list-style-type: none"> • Science week events and STEM careers fair - Discovery

Events

In recent years we have developed a strong events programme and intend to grow this back with a focus on, when conditions allow, key events that will attract audiences and allow us to develop the quality of our offer. We are still in discussion with partners about potential events, which will depend on estimated audiences – which of course in turn depends on the covid situation. Some key potential events for 2021-2 include:

2021-2	Key events
Apr-Jun 21	<ul style="list-style-type: none"> • Launch physical external escape rooms offer – Segedunum, Arbeia
Jul-Sept 21	<ul style="list-style-type: none"> • Diesel Gala and Victor & Vulcan days – Stephenson Steam Railway
Oct-Dec 21	<ul style="list-style-type: none"> • Halloween and Santa specials – Stephenson Steam Railway
Jan-Mar 22	Commence Hadrian’s Wall 1900 events – Segedunum, , GNM

Online Programming

TWAM maintains a strong commitment to online programming, something the past year has reinforced. Key elements in the plan for 2021-2 include:

- Must see stories – see section A2 below:
- Online exhibitions and projects relating to Climate change, including Fast vs slow online exhibition
- COP26 presentation of our immersive museum interactive that enables people to use GNMH (TWAM) collections with publicly shared media to co-author and rewrite stories branching out from collection objects and thereby shift us towards being a museum of the future.
- Community showcases such as supporting the launch of the NHS Trust LGBTQ+ online exhibition.
- Second World War and Holocaust Project (with Imperial War Museum) – creative digital output
- digital programming referencing annual events/anniversaries eg Black History Month, LGBTQ+ history month. .

The rest of the activity for TWAM is set out below according to ACE’s Investment principles (IPs)

- A: Ambition and Quality
- B Dynamism

A. Ambition and Quality

TWAM is an ambitious organisation, we constantly strive to improve our offer, and know that for audiences and communities to engage with us we must maintain a high quality across our diverse offer. We believe in making time to reflect on work that has gone before and strive to ensure we share experience across, and indeed beyond, TWAM in order to raise the levels of quality across all our work.

In this IP it is important to consider our capital development work which is also reflective of our ambition and desire to maintain and extend a high quality offer. Discussions around the future development of Discovery Museum are advancing with Newcastle City Council, and major capital programmes are also in discussion for South Shields Roman Fort (Arbeia) and Wallsend Roman Fort (Segedunum)

A1 Understanding and perception of Audiences/Stakeholders

Conduct and compile research to understand perceptions of audiences and stakeholders in order to shape our programme and offer (including new research as well as utilising existing tools e.g. Audience Finder)

<p>Q1 Apr-Jun Activity:</p>	<ul style="list-style-type: none"> • Participate in Let’s Get Real 10 looking at measuring online success. • Audit of digital content analytics for social media channels, YouTube, Google Arts and Culture, Must-see Stories and TWAM website to create a baseline re. TWAM’s digital audience. • Desktop research and work with venues to define what each venue’s ‘community’ is (distinct to its ‘audience’).
<p>Q2 Jul-Sep Activity:</p>	<ul style="list-style-type: none"> • Co-ordinate research to establish the needs of under-represented communities to inform audience development plans and programming. • Participate in Let’s Get Real 10 looking at measuring online success. • Draft digital audience development and evaluation methodology and pilot it.
<p>Q3 Oct-Dec Activity:</p>	<ul style="list-style-type: none"> • Use Must-see museums membership scheme (24k+ members) to gain insight about audiences and test emerging programme ideas. • Review digital audience development pilot, make necessary changes. • Roll out digital Audience Development Planning methodology to venue/team programmes.
<p>Q4 Jan-Mar Activity:</p>	<ul style="list-style-type: none"> • Continue to review quarterly as part of digital content reviews with venues/teams.

NB see also D3 for reference to community research and consultation.

A2 Progression

Much of the programme referenced above could equally be referenced here as it is through its delivery that we will make progress in the eyes of audiences and stakeholders. The activity listed below sets out our work to deliver high-quality digital content through the Must-see Stories editorial programme.

Q1 Apr-Jun Activity:	<ul style="list-style-type: none"> • Implement digital engagement policy • Apply for Esmée Fairbairn funding • Work with creative producer to deliver season one of Stories Of... cross collection audio series • Deliver Story of Arthur Wharton docu-drama series • Deliver Exhibitions Unpacked: Challenging Convention • Deliver Summerhill Square pilot episode • Deliver Exhibitions Unpacked: Sheila from Shields • Deliver Exhibitions Unpacked: Flesh on the Bones
Q2 Jul-Sep Activity:	<ul style="list-style-type: none"> • Recruit 2 x Content Producers (subject to funding) • Work with Storythings to produce Robert Coulthard audio series • Deliver Heavier! Faster! Louder! Season two • Deliver Exhibitions Unpacked: Print Goes Pop • Deliver Exhibitions Unpacked: Making Waves
Q3 Oct-Dec Activity:	<ul style="list-style-type: none"> • Deliver Margetts Mystery audio series • Deliver Black History Month programme • Deliver Halloween programme • Deliver Christmas programme
Q4 Jan-Mar Activity:	<ul style="list-style-type: none"> • Deliver LGBTQ+ History Month programme • Deliver Valentine's programme • Plan Must-see Stories programme 2022/23

A3 - Measuring Performance

We will integrate programme strategies into audience development plans for each venue covering both physical and digital activity and featuring bespoke objectives and indicators to measure and track achievements ensuring we learn from and build on what has gone before.

Q1 Apr-Jun Activity:	<ul style="list-style-type: none"> • Develop a methodology for evaluating digital content to feed back into planning and a plan for embedding this approach across TWAM. • Develop objectives and quality principles for programmes and use the Arts Council Impact & insight tool to measure success – root this in audience development plans.
Q2 Jul-Sep Activity:	<ul style="list-style-type: none"> • Work with each venue to align all programming plans with audience development objectives and embed with the whole venue team.

Q3 Oct-Dec Activity:	<ul style="list-style-type: none"> Review audience development / programme plans every quarter – monitoring metrics and insights against objectives and quality principles. Share this across TWAM.
Q4 Jan-Mar Activity:	<ul style="list-style-type: none"> Programming Group to contribute insights into wider organisational review to inform forward planning for 2022 onwards.

B. Dynamism

The coming year will see further shifts in our thinking both as we pull away from Covid, while accepting it casts a long shadow, and move towards fully embracing Lets Create. As noted above we will be taking forward the organisational changes recommended by the working groups supporting our equalities drive, and will be embedding the Investment Principles across the organisation.

B.1 Mission and Business Model

This year will see a New Director for TWAM, this combined with transitioning to a post covid business model the organisation will need to ensure it thrives into the future, means we will need a strong focus in this area.

Significant pieces of work include:

- Increased engagement of Board with TWAM
- Continuing our strong internal governance and communications development
- embedding of Exhibitions by TWAM within the business model
- post covid refocusing of income generation strategies for TWAM's development team and TWAM (Enterprises), both at corporate and venue level. This will ensure a strong and sustainable income model for TWAM, in which we continue to diversify the funding sources we are reliant upon to realise our mission.
- Induction of new Director and focus with key stakeholders to ensure TWAM meeting client needs.
- Review of mission
- Preparation and submission of Business Plan for 2022/3, and TWAMs bid for NPO status for 2023-6.

Area of Activity:	Income generation
Q1 Apr-Jun Activity:	<ul style="list-style-type: none"> Complete Case for Support for Art galleries (Gospels) launch spring appeal - Legacy/gifts in wills. launch new donor membership scheme as part of Must –see museums develop a strategy to grow Must See stories followers on Youtube to 1000 subscribers with 4000 hours watch time – with a longer term aspiration of monetising this
Q2 Jul-Sep Activity:	<ul style="list-style-type: none"> Review fundraising performance against strategy Scope next stage of CRM strategy to improve efficiency and effectiveness of communication and fundraising and to maximize sharing of audience insight

	<ul style="list-style-type: none"> Explore Patreaon as a platform for monetising some Must-see Stories content
Q3 Oct-Dec Activity:	<ul style="list-style-type: none"> Review TWAM fundraising strategy Pilot charging for Must see stories events/workshops around Halloween
Q4 Jan-Mar Activity:	<ul style="list-style-type: none"> Review and revisit Case for Support for TWAM Scope monetising Must See Stories YouTube Channel.

Area of Activity:	TWAM Enterprise
Q1 Apr-Jun Activity:	<ul style="list-style-type: none"> Review the current structure of TWAM (E) and establish its fitness for purpose Produce a recovery plan for venue hire and catering, with the aim of returning to 'established' levels of trading by April 2022. Produce a comprehensive marketing plan for the development of TWAME income streams, with a particular focus on Venue Hire, Events, and Ecommerce. Investigate potential for partnership with external event providers
Q2 Jul-Sep Activity:	<ul style="list-style-type: none"> Review the delivery of Wholesale and Ecommerce functions, with consideration given to merging them Continue to develop the 'Commercial Lead' roles in each of the venues. Develop a multi-year business plan for TWAM(E)'s charged events programme Implement communications activity to promote income generation
Q3 Oct-Dec Activity:	<ul style="list-style-type: none"> Investigate the sale of additional services through the TWAME online shop (tickets, events, wholesale product, birthday parties etc.) Deliver an enhanced autumn events programme
Q4 Jan-Mar Activity:	<ul style="list-style-type: none"> Review initial performance of actions implemented as part of the review and the venue hire and catering recovery plan Partner with learning to investigate possible income generating activities

B2 People and Skills

Our workforce is e the key to the success, or otherwise, of the organisation. We remain committed to their development.

A key element from the consultation work and working groups with staff over the past year is the need to develop and implement a new internal communications strategy.

Other key elements of work will be

- Reinvigoration of our Mental Health Champions group following national closure of the Time to Change movement
- Review of volunteering to ensure we are able to provide a focussed high quality offer to our volunteers
- Ongoing development of an appropriate recognition and reward system

Specific initiatives include:

- In Discovery Museum a ‘Gallery advocacy’ scheme will be developed utilising front of house staff to develop greater connections between FOH, visitors interpretation and history and events programming.
- At Stephenson Steam Railway we will work with the North Tyneside Steam Railway association to establish a young volunteers group to help sustain and develop the volunteer workforce

Q1 Apr-Jun Activity:	<ul style="list-style-type: none"> • Re-establish an effective workforce development group. • Review existing processes and policies for training and development so TWAM has a clear training & development landscape and more awareness of career progression/ career routes. • Draft internal communications strategy looking at all internal communications channels, including feedback loop and evaluation measures
Q2 Jul-Sep Activity:	<ul style="list-style-type: none"> • Discovery – develop ‘Gallery Advocacy’ role with staff • launch young volunteer recruitment drive at SSR • Disseminate internal communications strategy including briefings/training for managers • Learning Together – social prescribing training course using action learning set..
Q3 Oct-Dec Activity:	<ul style="list-style-type: none"> • Development and delivery of a revised appraisal process • Take annual H&S Monitoring Report to Audit Committee and Strategic Board • Hold induction / refresher day for Board Members • Discovery – implement ‘Gallery Advocacy role
Q4 Jan-Mar Activity:	<ul style="list-style-type: none"> • Re-introduction of knowledge exchange sessions for staff • Implementation of enhanced management & leadership training • Specific anti-racism/ equality training delivered to all workforce in addition to Equality & Diversity Training that all staff have to complete as part of induction. Evaluate impact of gallery advocacy role. • Review roll out of comms strategy and gather feedback via staff survey.

B3 Using Tech and Data

TWAM strives to be a data driven organisation. Improvements in this area include:

- revisions to our collections information processes to ensure the collections information we hold is better quality and more fully accessible/utilisable
- an increased focus on understanding our audiences through the development of our relationship with our Must See stories members
- The development of our CRM
- Implementation of a digital strategy and skills training programme to increase digital confidence across the organisation.
- development of ticketing strategy for gospels

Q1 Apr-Jun Activity:	<ul style="list-style-type: none"> • Recruit Assistant Digital Officer (subject to funding). • Audit digital literacies and confidence across the organisation through digital capacity gauge and conversations with staff. • Provide regular updates on digital programme through TWAM communication channels and knowledge exchanges. • Commence working with Tourism UK Ltd to determine an appropriate ticketing model to optimize strategy around ticket sales for Lindisfarne Gospels in 2022.
Q2 Jul-Sep Activity:	<ul style="list-style-type: none"> • Pilot digital training programme for staff which will include a mix of workshops and creation of online resources. • Continue NXT CRM implementation for Communications and Development activity and develop future CRM strategy • Develop system to improve capture of research from staff, partners and communities on our systems. • Recruit volunteers to support accessioning backlog for SSR.
Q3 Oct-Dec Activity:	<ul style="list-style-type: none"> • Review pilot digital training programme and make necessary changes. • Revised collections development policy signed off by Board. • Commence project to review previous community projects to ensure all properly captured on EMU collections management database
Q4 Jan-Mar Activity:	<ul style="list-style-type: none"> • Launch of project to improve online collection search experience.

C: Environment

TWAM will continue to build on its commitment to become more environmentally conscious across all areas of its activity. All 9 TWAM venues hold Creative Green Certification. Six of TWAM's venues have been awarded a 4-star Creative Green rating with a further three achieving 3-stars

We have maintained a group of green champions across the organisation since 2017 who collectively form a diagonal slice TWAM wide working group for environmental sustainability. This will be enhanced by Board representation in line with the other IP working groups.

Nevertheless we recognise the need to do more, both in terms of our own approaches, and in terms of engaging the wider public with the issues at hand. The year ahead will see the working group explore what this IP will mean in terms of shifting TWAMs practice. Our initial proposed activity for the year is set out below – as the year progresses and we broaden and deepen our conversations around the environment, we would envisage the work listed becoming richer and with the potential for additional work to take place.

Our aim is to ensure, by being proactive, anticipating challenges, and planning ahead, we will be able to respond to the challenges of the next decade in this area.

This will include

- embedding environmentally responsible practices throughout our operations
- championing environmentally responsible behaviours from our workforce, (paid and voluntary), contractors and visitors.
- ensuring our approaches to environmental issues are communicated internally to ensure all staff, volunteers and visitors are fully engaged and aware of the work taking place and their opportunities to enhance it still further.

C1 Understand the Data

At the core of this is an understanding of the impacts we are having. Not all apparent green changes deliver on the benefits envisaged and it is incumbent on us to interrogate the data we have in order the plan improvements and to assess their effectiveness and learn from them. Key activity across the year will include:

- holding quarterly Environmental Working Group meetings
- attending external Environmental webinars, conference, workshops etc and share best practice back to organisation.
- reviewing utilities data across venues to minimize energy expenditure, including working closely with Local Authority asset management teams as relevant

Area of Activity:	Developing strategy based on data
Q1 Apr-Jun Activity:	<ul style="list-style-type: none"> • Host Julie’s Bicycle workshop session looking at developing key targets • Update Environmental Working Group Terms of Reference and key objectives. • Review and update TWAM’s Environmental Policy • Agree strategy and targets to March 2023 • Develop a new site for Environmental Responsibility on TWAM sharepoint • Blandford House redevelopment – review utilities and identify areas for savings
Q2 Jul-Sep Activity:	<ul style="list-style-type: none"> • Develop new Environmental Report in order to share data and progress against targets • Blandford House redevelopment - explore and identify refurbishment opportunities that reduce energy consumption.
Q3 Oct-Dec Activity:	<ul style="list-style-type: none"> • Ensure skills and knowledge are in place to allow staff to use data to improve environmental responsibility. • Recruit more Green Champions
Q4 Jan-Mar Activity:	<ul style="list-style-type: none"> • Carry out review of effectiveness / skills audit • Update targets 2022/23 based on 2021/22 experience

C2 Plan, Action and Change

Linked to the activity listed at C1 we are planning the following activity across our venues and teams to reduce our environmental impact. This will of course be linked to an increased understanding of the data we hold. As part of our general commitment we will:

- use high efficiency, low energy, long life and LED lighting wherever possible in our exhibitions.
- ensure where possible materials will be sourced from sustainable sources
- encourage and continue virtual couriering for loans in/out – reducing travel requirements around exhibition installs and deinstall.
- Develop green plans for our outdoor sites at Arbeia and Segedunum This will include developing an environmentally friendly grounds management plan.

Area of Activity:	Reducing Environmental Impact of TWAM
Q1 Apr-Jun Activity:	<ul style="list-style-type: none"> • explore and Oddy test options for collections packaging materials and reduction of package waste. • TWAM(E) to report on impact of delivery of trading function considering where improvements can be made (eg paper and plastic use in shops and cafés) • Installation of Solar PV panels to GNM as part of campus wide pilot
Q2 Jul-Sep Activity:	<ul style="list-style-type: none"> • Develop disposals pilot at Discovery Museum – in part to reduce environmental footprint of our stores • TWAM(E) Board to sign off on Environmental plan • Develop action plan for review of storage area at SSMAG • Discovery – relaunch facilities in Museum to support staff recycling
Q3 Oct-Dec Activity:	<ul style="list-style-type: none"> • Commence work to upgrade Regional Museum Store facility at Beamish – in part to reduce environmental footprint of our stores. • where possible move from paper to digital record keeping and encourage staff to print only when necessary • review procurement and identify areas where paper and plastic use could be reduced
Q4 Jan-Mar Activity:	<ul style="list-style-type: none"> • TWAM (E) Board to review initial results of environmental plan • install new racking and other storage improvements at SSMAG (Funding dependent)

C3 Influence Education and Advocacy

We recognise that as a public body we need to set an example through our actions, and acknowledge we have a role in influencing society. As such we are planning a series of actions to raise awareness of environmental agendas with our visitors and stakeholders, and encouraging our programme participants to take active responsibility. Areas of work include:

- Discovery – project to produce a series of creative outputs with students from Newcastle College on the theme of climate change
- Online exhibit ‘Fast versus slow’ exploring environmental impact of ever changing fashion
- We will seek to connect people with the environment through our wellbeing work eg partnering with Newcastle City Council on their Health Walks programme and City Guides
- Shipley Art Gallery Rothschild community project exploring waste and the environment
- Hatton – Zero Waste project working with Newcastle geography students based on Schwitters Merz Barn Wall, outputs will include digital resources for primary schools
- The Environmental Records Information Centre (ERIC) North East works closely with wildlife recording groups and individuals to collate as much information as possible on important species, habitats and sites in the region. This data is used to inform those working in wildlife conservation, planning and the voluntary recording community when they make decisions about the environment. It also aims to encourage more people to get involved with wildlife recording by raising awareness of local and regional voluntary recording groups.
- develop approach to encourage use of public transport where possible, partner with Elders council and Nexus on culture bus project and with Sustrans to explore walking and cycling routes between venues.
- Specific timetabled work includes:

Q1 Apr-Jun Activity:	<ul style="list-style-type: none"> • Discovery - work with students to identify key themes • Hatton – ‘Zero Waste’ project delivery • Shipley - Planning for Rothschild project
Q2 Jul-Sep Activity:	<ul style="list-style-type: none"> • Discovery –work with students on creative response • research and develop content for fast versus slow • set up partnership with NCC re promotion of Healthy Walks.
Q3 Oct-Dec Activity:	<ul style="list-style-type: none"> • Discovery launch climate change creative outputs • Launch ‘fast versus slow’ • delivery of Rothschild community project. • GNM presence at COP 26
Q4 Jan-Mar Activity:	<ul style="list-style-type: none"> • Discovery, monitor and evaluate Climate Change creative outputs • Monitor and evaluate ‘Fast versus slow’

D Inclusivity and Relevance

TWAM has had a people focussed mission for over 20 years. We constantly strive to reach out to people and ensure we have meaning and relevance to them. As referenced elsewhere, the past year has seen a renewed focus on ensuring we deliver strongly on the equalities agenda, including commencing work to become an anti racist organisation.

D1 The Creative Case for Diversity

TWAM has been developing its Creative Case work for several years, with strong programming and clear reporting to and engagement from our Strategic Board. Much of our programming and collecting considers representation of the protected characteristics and socio-economic status. Key areas of work include:

- 100 years of collecting at the Laing – an exhibition designed to make visible artists not recognized by the canon of British art and those artists from diverse cultural backgrounds and those with protected characteristics. It will be a reflection on the evolving nature of the Laing’s collection.
- The IWM project at Discovery Museum, revealing the role of women and the BAMER community on Tyneside during WW2 Collections development work ensuring we collect relevant objects and stories, and ensuring the information we hold can be better searched for with regards representation of protected characteristics.
- The decolonisation of the Great North Museum
- Research to recontextualise the Uhlman collection of artefacts from West Africa in the Hatton
- continued support for PhD candidate looking at the representation of women in the art collection.

<p>Q1 Apr-Jun Activity:</p>	<ul style="list-style-type: none"> • development of guidance to staff on entering data on new EMU tab for protected characteristics • work with community groups to identify stories about the role of women and the BAMER community on Tyneside in WW2. • support NHS Trust LGBTQ+ group to launch online exhibition. • Laing’s ‘100 years of collecting’ exhibition opens. • Deliver Arthur Wharton docu-drama series in partnership with The Arthur Wharton Foundation. • Work with Richard Bliss to set up LGBTQIA+ group to explore stories and pilot Summerhill Square episode on Gwen John. •
<p>Q2 Jul-Sep Activity:</p>	<ul style="list-style-type: none"> • Launch of guidance to staff on entering data on new EMU tab for protected characteristics • Begin digitising relevant TWAM collections for use on SWWHP (IWM) project • appointment of external consultant, Asst Curator and documentation assistant to support decolonisation of GNM (funding dependent) • Explore women’s stories in ‘Women Behind the Big 5 and Beyond’ series as part of Must See Stories.
<p>Q3 Oct-Dec Activity:</p>	<ul style="list-style-type: none"> • Sign off of new collections development policy which will ensure protected characteristics are better represented in the collections.

	<ul style="list-style-type: none"> • recruit creative practitioner to work with community groups to develop creative output for SWWHP (IWM) project • Work with communities to deliver Black History Month programme. •
Q4 Jan-Mar Activity:	<ul style="list-style-type: none"> • Launch creative output from SWWHP (IWM) project • GNM decolonisation review compiled with help of external consultant and new action plan published for the coming year. • Work with LGBTQIA+ community to deliver LGBT+ History Month programme.

D2 Workforce leadership and governance

We recognise the demographic makeup of our region is changing and we will continue to strive to ensure our workforce (paid and voluntary) is truly representative of the communities it serves. This year will see us:

- review demographic data and set targets for future recruitment
- utilise the internal communications strategy to engage staff in this process
- review our systems to root out any systemic racism
- actively seek out and support initiatives designed to diversify the sector's workforce such as the Culture&/New Museum School postgraduate placement programme.

Q1 Apr-Jun Activity:	<ul style="list-style-type: none"> • Audit of existing recruitment processes by Workforce Development Group (Using ACE and CCS guidance) • Implement monitoring for socio-economic diversity for workforce and applicants. (Reliant on NCC)
Q2 Jul-Sep Activity:	<ul style="list-style-type: none"> • Initial actions developed and community partners approached for feedback • Introduce process to effectively monitor freelancer diversity • Improved workforce monitoring process established and status discussed with Board to agree specific issues and further actions. • Interview for Culture&/New Museum School placement • 2021 GNM/Beacon films work placement recruited
Q3 Oct-Dec Activity:	<ul style="list-style-type: none"> • Staff induction programme updated to include information about how career progression works in the organisation
Q4 Jan-Mar Activity:	<ul style="list-style-type: none"> • Implementation of recommendations for improvement. (Expected outcomes include updated jobs information on website, vacancies continue to be advertised more widely, improved monitoring processes, improve employability support for interns, students and work experience) • support Culture&/New Museum School placement re decolonisation research at GNM.

D3 Communities

AT TWAM we have a strong record of community engagement and co-curation. However, as we move towards Lets Create we see this as an area for further growth. A key element is to co-ordinate research (with stakeholders and communities of our venues) to establish the needs of under-represented communities to inform audience development plans and programming. This will include developing and communicating principles for working with community partners that set out what we can expect from each other in our collaborations.

Q1 Apr-Jun Activity:	<ul style="list-style-type: none">• Take forward the actions of the communications audit regarding our reach to diverse audiences considering our communications channels, language and tone of voice and test with audiences.• Draft scope of community research and methods to gather the information needed to inform audience development plans.
Q2 Jul-Sep Activity:	<ul style="list-style-type: none">• Conduct research.• Develop a communications strategy for Learning and Engagement programmes to ensure we are effectively targeting learning and community audiences.
Q3 Oct-Dec Activity:	<ul style="list-style-type: none">• Share results across organisation and embed in audience development and programme plans.
Q4 Jan-Mar Activity:	

We will continue to broaden and deepen our engagement with communities across all areas of our activities. 2020-21 saw us publish the MHSC, a new resource that supports health and social care professionals to use museums as part of a care practice when working with older people.

A key element in our programme is the co-creation of adult health, social care and wellbeing programmes that are relevant to people living in the North East by responding to the key social issues they face. This will include the continued delivery of the three strands of our adult health social care and wellbeing programmes:

- RICH (Recovering Identified through Cultural Heritage) programme aimed at those in justice and addiction recovery
- Platinum programme – aimed at older peoples
- Wellbeing programme aimed at Mental Health service users

We will be reviewing our volunteer offer this year to ensure that we are able to offer relevant opportunities to volunteers from a diverse range of backgrounds. This will include the development of remote digital opportunities that will help us to extend our reach.

The year will see us work towards Museum of Sanctuary status, as a result of our work with refugee and asylum seekers to engage them as volunteers with TWAM.

Other community focused initiatives occurring across the year include

- Creation of a methodology for recording community collaborators' stories in EMu and enhancing collections data.
- continuation of work delivering collections led sessions in the Great North Children's Hospital
- Artist led community workshops for isolated older peoples at Shipley Art gallery supporting groups to use the Shipley as a hub for meetings
- Shipley will continue consultation with Gateshead community groups and the health sector to develop a community network group in Gateshead linked to the thrive agenda
- Continue to work with South Tyneside Council on supporting lonely and isolated peoples in the community promoting museums there as part of a dynamic toolkit for living.
- explore options for developing a Culture Health and wellbeing group in South Tyneside, building on existing relationships with clinical commissioning groups etc

Q1 Apr-Jun Activity:	<ul style="list-style-type: none"> • identify funding to develop a volunteer project co-ordinator role to work with a focus on underrepresented communities building on the experience of the Pea Green refugee and asylum seekers project. • L-ink young people's group at Laing will curate new display of works from Art collections that challenges traditional narratives and offers new perspectives • Shipley Art gallery – spring wellness art packs with materials to be distributed to communities in Gateshead.
Q2 Jul-Sep Activity:	<ul style="list-style-type: none"> • work with Children North East to research Poverty Proofing for TWAM • work with professionals in Health and Social care sectors to apply principles of MHSC resources across our programmes as relevant. • Shipley – Rotshchild ceramics community outreach project partnership with re coco recovery college ceramics skills sessions for people recovering from addiction • L-ink group will create interactive guide aimed at their peers
Q3 Oct-Dec Activity:	<ul style="list-style-type: none"> • SSMAG – explore potential for a new community based friends groups for the museum – initially around a specific project such as the forthcoming shipbuilding exhibition. • work with partners to explore joint ways of making more of Arbeia as a community space. • L-ink project launch at Laing
Q4 Jan-Mar Activity:	<ul style="list-style-type: none"> • Launch of new SSMAG friends group. • support community engagement projects at Arbeia and Segedunum as part of Hadrian's Wall 1900 festival

2022-3 and beyond

As 2021-2 marks a transition towards the embedding of the Investment principles and Lets Create, so we anticipate 2022-3 will focus more on the priorities of Lets Create. Much of the activity for the year will focus on building from the work carried out over 2021-2 including:

- Continue to build new relationship with audiences, stakeholders and participants as we move beyond Covid.
- Building from the firm foundation of Equalities work including around becoming an anti racist organisation and the development of stronger relationships with the communities we serve.
- Building on the stronger relationship developed with our staff and volunteers

In terms of activity there are two highlights for the year

- The Lindisfarne Gospels exhibition at the Laing
- Participation in the Hadrian’s Wall 1900 festival.

Both will see additional wrap around activity from across TWAM.

In terms of capital redevelopments we anticipate progress for

- Blandford House (Discovery Museum and Tyne & Wear Archives)
- Laing Art Gallery
- Segedunum Roman Fort
- Arbeia, South Shields Roman Fort

Concordance of previous NPO Activity plan objectives (2018-21) to Investment Principles

The previous iteration of the TWAM activity plan was structured according to the five Goals of ACE’s previous 10 year strategy. This current iteration is set out predominantly against the investment principles. This concordance shows which of the objectives from the 2018-21 TWAM activity plan contribute to which of the Investment Principles. The read across is not always straightforward (eg there is no dedicated IP around the engagement of children and young people). So previous objectives are listed both against IPs to which they make a primary contribution, and where their contribution can be regarded as secondary (that is to say the sub characteristic of an IP does not encompass the majority of the work of a given objective)

Investment Principles	Primary IP contribution	Secondary IP contribution
Ambition and Quality		
Understanding perceptions	2.1 audience analysis 5.2 schools	
Making progress	1.1 Exhibitions 2.2 audience experience 4.4 partnership/leadership 5.1 CYP nationally leading learning	5.2 schools 1.4 digital
Measuring performance	5.5 Arts award	
Dynamic		

Future facing business models	3.1 Governance 3.2/3.3 income	4.4 partnership/leadership
People and skills	1.3 creative practice 4.1 skills	4.2 workforce diversity
Digital/data driven culture	1.2 research on collections 1.4 digital 5.6 CYP digital	
Environment		
Understand the data	3.4 Environmental	
Plan action and Change	3.4 Environmental	
Influence Education and Advocacy		1.1 Exhibitions
Inclusivity and relevance		
Creative Case for Diversity	1.5 Creative Case for Diversity	1.1 exhibitions, 1.3 creative practice, 4.2 workforce diversity 1.2 research on collections, 1.4 digital
Workforce leadership and governance	4.2 workforce diversity, 4.3 volunteers	
Relevance to communities	2.3 outreach 2.4 co-curation 5.3 CYP families 5.4 Young People	4.3 Volunteers, 1.2 research on collections