About the Programme

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

Cause 4, in partnership with the Arts Marketing Association (AMA) and Creative United has been awarded additional funding by the National Lottery Heritage Fund and Department for Digital, Culture, Media & Sport to expand the programme from 150 up to 300 organisations across England.

The mission of the Programme is to:

• Close the skills gap: there are currently fewer staff in the heritage sector receiving training than other parts of the cultural sector

• Diversify funding: Many heritage organisations receive less of their turnover from private sources than other sectors

• Grow operational knowledge: 34% of heritage organisations say their workforce lacks understanding of how their organisation work

• Strengthen Leadership: We need to encourage joined-up thinking to address vulnerabilities and threats

• Identify innovative solutions to financial and environmental threats: The sector faces unprecedented financial and environmental problems, added to by COVID-19, calling for fresh and inventive solutions

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

It is important to note that the focus of the Programme will be on sustainability and long-term solutions for the sector.

Applications now open 1 Nov – 16 Dec 2021

We have more spaces available for small or medium sized heritage organisations based in England as part of this final recruitment round. Programme places will be offered on a rolling basis.

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

We are looking for organisations who have a maximum turnover of £1,000,000

Who is it for?

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

What do we mean by Heritage?

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

If you are not sure if you classify as a heritage organisation, take a look at the Heritage Fund website here.

Who can apply?

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

• Have a maximum turnover of £1,000,000.

• Be considered a heritage organisation as defined by the Heritage Fund.

• Be either a Start-Up; Registered Charity; Charitable Incorporated Organisation; Community Interest Company; Social Enterprise; B Corporation or Not-For-Profit. If your heritage organisation is part of a local authority service or large organisation such as a University you can still apply if the service area turnover has a maximum turnover of £1,000,000.

• Be based within England.

• Be at a Manager level or above (can be in a high-level voluntary role i.e. a Trustee).

Programme Details

Throughout the Programme you will get:

• Six training courses, covering topics including business planning, fundraising and income generation, governance, financial planning, earned income and audience development.

• Up to 5 places at two Symposiums for your organisation, which will bring all delegates together to identify and share best practice and will include expert guest speakers and roundtable discussions.

• Access to eLearning, including the accredited course ‘Arts Fundraising and Leadership’ developed in partnership with the University of Leeds, and a closed online course on business planning, fundraising strategy and implementation.

• A critical friend and personal mentor, with access to regular one to one support.

• Ongoing access to the heritage benchmarking dashboard.

What’s in it for me?

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

• A developed or re-invigorated Business Plan

• More effective governance and financial planning

• A process to manage internal culture change

• A developed or re-invigorated income generation strategy

• A developed or re-invigorated audience development plan

• An understanding of how to use benchmarking to inform decisions

• An improved network and increased confidence

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

How much will it cost me?

The Programme is free to participants and we will cover your travel to training and the symposiums (Covid-19 permitting).

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

The Heritage Compass Programme involves circa 10 – 12 days of commitment spread across the year as well as additional time spent on personal refection, learning and mentoring. We recommend that more than one person is involved with the programme so as to really embed the learning across the organisation.

Backfill Grants

As part of the Programme, we are able to offer a limited number of grants. This is to help widen access to the Programme as organisations work towards recovery and gain resilience following on from Covid-19.

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

• Covering costs of staff absences whilst on the Programme

• Providing interim cover for staff whilst participating in the Programme

• To take pressure of internal income targets throughout the Programme

Please think carefully about what you apply for and your organisation’s need. We suggest applying for between £500 and £2000.

How to Apply

We are open for applications:

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

You can find out more speaking to us at one of our Q&As about Heritage Compass with Head of Programme Shirley Lundstram.

These will take place:

- Thursday 18th November 2021, midday – 1pm

- Thursday 9th December 2021, midday – 1pm

Reserve your space at either one of our Q&As here.

<https://us06web.zoom.us/meeting/register/tZEldeuspzwqH9NH5h3OrcnG9R6WoCTx9yuF>

Click here and submit your application via SurveyMonkey online.

<https://www.surveymonkey.co.uk/r/heritagecompass>

You will need the following information to complete your submission:

• Organisation name

• Company number

• Registered Charity Number (if applicable)

• Organisation address and geographic location

• Organisation turnover

• Your current financial situation and the impact of Covid-19 on your work

• Lead applicant name, role and contact details

• An overview of your vision, mission and objectives

• Your intended outcome from the Programme

• An overview of why you are applying to the Programme and what you hope to get out of it

• Your Case for Support, including the impact of not participating in the Programme

• A personal statement outlining how you would benefit the rest of the cohort

• Details of your request for funding (if applicable), including the amount requested and what the funds will be used for

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

About the Partners

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

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

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

The National Lottery Heritage Fund uses money raised by the National Lottery to Inspire, Lead and Resource the UK’s heritage, to create positive and lasting change for people and communities, now and in the future

Further Information

We welcome applications from people of all backgrounds to reflect the diversity of the sector across England. We understand that diversity encompasses a whole range of meanings including race, ethnicity, faith, disability, age, gender, sexuality, class and economic background as well as many other social and institutional barriers that prevent people from creating, participating or enjoying the arts, culture or heritage.

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

For further information about the Programme or the work of Cause4 please contact heritage.compass@cause4.co.uk

“The additional support from National Lottery Heritage Fund & DCMS means we can double the reach and impact of our Heritage Compass Business Support Programme at a critical time for the heritage sector, as organisations look to rebuild post Covid-19. We are now able to take 300 organisations through a wide-ranging programme of business, funding and development support. We can’t wait to welcome more senior leaders, staff, volunteers and Trustees as part of this journey.”

Michelle Wright, CEO and Founder of Cause4

“The National Lottery Heritage Fund is delighted to work in partnership with Heritage Compass Business Support and Cause 4 in supporting the wider resilience and enterprise of the heritage sector across England. In building the business knowledge and skills of heritage organisations, we know the Heritage Compass Business Support Programme will strengthen business resilience and the delivery of a more inclusive, contemporary heritage sector.

Thanks to National Lottery players, heritage organisations gain increased business expertise and confidence.

 These partnerships are crucial in the delivery of our shared commitments to build a stronger heritage sector as part of UK pandemic recovery.”

Liz Ellis, Policy Project Manager, Business Innovation and Insight, The National Lottery Heritage Fund