
Review of ways of working in *Our Museum*

Report to the Paul Hamlyn Foundation

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Summary

About the *Our Museum* programme

Despite years of project funding for engagement and participation work in UK museums and galleries, research suggests this has not always led to fundamental change in organisational culture and practice. The Paul Hamlyn Foundation (PHF) created the *Our Museum* programme to support a cohort of museums and galleries to undergo an organisational change process to properly embed participation, and to use insight from this experience to help the wider sector to change the way it works.

From January 2012 to the end of 2015, *Our Museum* supported the following organisations: Hackney Museum; Bristol Culture; the Lightbox, Woking; Amgueddfa Cymru – National Museum Wales; Belfast Exposed; Tyne and Wear Archives and Museums; and Glasgow Museums and Galleries. *Our Museum* supported Ryedale Folk Museum until June 2014 and the Museum of East Anglian Life until February 2015. Each of these nine participating organisations received a mix of funding and support to help them achieve the programme's four overarching aims, which were to ensure their institution is rooted in local needs; involve communities in decision-making and promote community agency; build the skills and capacities of community members and staff; and embed reflective practice and encourage alternative working methods.

Our Museum was overseen by the PHF Arts Programme Committee and a programme Steering Group, and was managed by an independent Project Director. It was supported by two independent evaluators who, later in the programme, also provided some developmental assistance to participating museums and galleries (as 'Critical Friends'). Each participating organisation appointed a Lead Contact and identified a number of community partners to work alongside them on the programme.

About this review and this report

In the autumn of 2015, as *Our Museum* drew to a close, PHF commissioned our team, as independent researchers, to carry out a piece of work to help those involved in the programme to reflect on what they had learnt about how the Initiative was structured and how participants had worked together. The purpose of this review was not to assess the impact of the programme or its success in meeting its objectives, as this was the focus of the main evaluation. Rather, the aims were:

- A. To enable PHF and partners involved in *Our Museum* to understand the range of perspectives on:
 - the strengths and weaknesses of the structure of roles and responsibilities, and the ways in which they were carried out; and
 - how these impacted on the success or otherwise of the Initiative as a whole, and whether or not they were fit for the purpose and objectives of the Initiative.
- B. To examine the processes used by the Initiative to enact these roles and responsibilities – e.g., evaluation visits, peer reviews, Lead Contact meetings, Steering Group meetings, and Critical Friend meetings – and to analyse participants' views of their effectiveness.
- C. To enable PHF and others to consider the implications of the findings for work in other contexts in the future.

The review took place between November 2015 and March 2016 and involved individual and group discussions with more than 50 programme participants, including PHF staff, Steering Group members, the Project Director and evaluators, staff from the museums and galleries that took part, and some of their community partners. This report captures the main findings from our consultations and our assessment of what we heard.

Overview of findings and key messages for participants

We have been really struck by the huge commitment of everyone involved in *Our Museum* to the programme's mission to properly embed excellent participatory practice so that it is sustained for the long term. It seems to us that the experience of taking part in the programme has been very challenging at times, but this is hardly surprising given the demanding nature of the task and the difficult context in which the programme has been operating.

There has been much about the programme arrangements that has worked well and has contributed to programme objectives. In particular, it seems that participating museums and galleries have benefitted from sage advice from a skilled central team, insightful challenge from experienced evaluators/Critical Friends, encouragement and support from respected peers, and exposure to some novel and inspiring ideas and practice. Some museums and galleries also received additional financial and other support (on top of the standard *Our Museum* funding and support offer) to address wider organisational challenges that might have jeopardised their participation in the programme. This also seems to have been very valuable, and much appreciated.

Our Museum was designed to encourage experimentation and learning, and programme arrangements should be approached in the same spirit. In carrying out this review, we have found plenty of evidence of learning and improvement in ways of working during the course of the programme. Notable examples include the instigation of Lead Contact meetings, the development of a more collaborative approach to the design and facilitation of peer reviews in years two and three, and the emphasis on a principle-based approach to change rather than on particular structural models in the latter part of the programme. Overall, everyone we spoke to recognised that ways of working on *Our Museum* became much more collaborative as the programme progressed. As several participants told us, the decision to commission this review is in itself evidence of PHF's commitment to collaborative learning and improvement.

This report sets out programme experience and learning under 10 themes that seem to us to be worth thinking about before embarking on a similar long-term change programme in future. Under each theme, we identify what worked well in terms of the programme arrangements on *Our Museum* and is worth repeating in future. We also make some suggestions about things that might be tackled differently.

Drawing on both what worked well and what might be tackled differently, we suggest that the main points that PHF/programme leaders may wish to consider in future include:

1. *Designing the journey with the end in mind*: investing in a collaborative approach to programme design, developing a shared theory of change that articulates how working with a particular cohort will support sector-wide change, and drawing more explicitly on relevant experience and learning from other sectors in designing programme arrangements
2. *Creating the best starting point*: checking participants' appetite and capacity to get involved in a long-term programme, negotiating roles and expectations carefully, engaging leaders within participating organisations at an early stage, and building in a scoping/testing period at the start of a long-term programme to allow participants to check and consult more widely on their plans to ensure they are still appropriate and feasible
3. *Balancing direction with flexibility*: promoting core change principles rather than particular structural models, and exploring ways to surface and share assumptions about what 'good practice' looks like
4. *Balancing support with challenge*: taking care with feedback and delivering challenging messages in person where possible, building in bespoke organisational support and targeted training from the start, and encouraging participating organisations to involve community partners in designing and delivering training
5. *Creating the right conditions for peer support and learning*: establishing a forum for peer exchange and support from the beginning and using this to co-design other arrangements, helping participants to get to know each other and understand each other's plans as early as possible, and developing some shared principles/protocols for communicating with a network of funded organisations
6. *Modelling what you want to achieve*: trying to ensure ways of working reflect the nature of the task and the spirit of the programme, creating early opportunities for those taking part in any programme to get to know those making judgements about their progress, agreeing some principles to guide ways of working, and encouraging all participants to take responsibility for proactively contributing ideas about how to design and improve programme arrangements and ways of working
7. *Forging a new funder/grantee relationship*: communicating the intention to create a new kind of funder/grantee relationship at the start and throughout the life of a programme, and identifying symbolic opportunities to demonstrate that commitment
8. *Harnessing the power of formative evaluation*: building in evaluation from the start, keeping evaluation and support roles separate, and designing evaluation to gather the range/types of evidence required to make the case for this work with different audiences
9. *Deploying skills and expertise in support of programme goals and wider strategic agendas*: supporting the Project Director to navigate and link up with PHF internal decision-making structures, exploring possible team structures for programme leadership, identifying other ways to harness the expertise of Steering Group members, and

contracting for additional expertise with care and with programme goals and wider strategic agendas in mind

10. *Creating a shared vocabulary and narrative*: helping participants to understand key concepts, having a strong, overarching narrative that sits above programme outcomes, and exploring possible external support to help participants communicate programme goals and learning in a compelling way.

Drawing on both what worked well and what might be tackled differently, we suggest that the main points that participating organisations might wish to consider include:

2. *Creating the best starting point*: thinking really carefully about what they want to get out of any long-term funded programme and the time and effort that might be involved in carrying out the work and liaising with the funder and other participants, consulting widely on and testing plans at bid-writing stage and on joining a programme to ensure they are appropriate and feasible, and ensuring leaders and senior managers are on-board and actively championing participation
4. *Balancing support with challenge*: ensuring programme Leads are adequately supported and appropriate mechanisms are in place to take forward programme learning and remove barriers to change, and involving community partners in designing and delivering training
6. *Modelling what you want to achieve*: helping to agree some principles to guide ways of working, and taking responsibility for proactively contributing ideas about how to design and improve programme arrangements and ways of working
8. *Harnessing the power of formative evaluation*: embedding self-evaluation to ensure progress is sustained
9. *Deploying skills and expertise in support of programme goals and wider strategic agendas*: recruiting Leads with the appropriate blend of personal qualities and positional authority for the task.

At its heart, *Our Museum* has been about forging new types of partnerships: between museums and galleries and their communities, and between PHF as a funder and the organisations it supports. In our experience, good partnership working is based on a sense of shared endeavour, clarity about roles and expectations, mutual respect and recognition of divergent pressures and interests, and good mechanisms for reviewing progress and working arrangements. We hope that this report provides some helpful pointers on these issues and will prove useful in designing future programmes – particularly those involving networks of organisations working together, concerned with organisational development and change, and characterised by an ‘engaged funder’ relationship with grantees.

Introduction

About the *Our Museum* programme

The *Our Museum* programme has supported a cohort of museums and galleries throughout the UK to mainstream good participatory practice and, in doing so, to generate learning for the wider sector. From January 2012 to the end of 2015, the programme supported Hackney Museum; Bristol Culture; the Lightbox, Woking; Amgueddfa Cymru-National Museum Wales; Belfast Exposed; Tyne and Wear Archives and Museums; and Glasgow Museums and Galleries. *Our Museum* supported Ryedale Folk Museum until June 2014 and the Museum of East Anglian Life until February 2015.

Our Museum reflects Paul Hamlyn Foundation (PHF)'s long-standing commitment to widening access and deepening participation in the arts and cultural sector. As a PHF Special Initiative, it is also an important example of engaged grant-making.

Our Museum was informed by an extensive phase of evidence gathering and consultation, including some participatory research by Dr Bernadette Lynch¹. This found that despite years of project funding for engagement and participation work, and some good practice, this had not always led to fundamental change in institutional culture and practice. The *Our Museum* programme was therefore designed to support a cohort of museums and galleries to undergo an organisational change process to properly embed participation, and to use insight from this experience to help the sector to change the way it works.

Specifically, *Our Museum* aimed to support participating museums and galleries to:

- Understand their role within their locality and respond to community needs and values (Outcome 1 – rooted in local needs)
- Place communities at the core of their values, strategies, structures and work, and ensure they are actively involved in dialogue and decision-making (Outcome 2 – community agency)
- Play an effective role in developing community skills and capacity, and supporting staff to work with communities (Outcome 3 – capability-building)
- Embed reflective practice, internally and with partners, to encourage greater openness, and alternative values and working methods (Outcome 4 – reflection).

¹ *Whose Cake is it anyway, A collaborative investigation into engagement and participation in 12 museums and galleries in the UK*, Dr Bernadette Lynch for the Paul Hamlyn Foundation, April 2011

Twelve museums and galleries were invited by PHF trustees to apply for the *Our Museum* programme, all of whom had taken part in Dr Bernadette Lynch's original research. Nine organisations were accepted on to the programme, with seven completing the full three years. In order to support programme outcomes, participating museums and galleries received a mix of funding (c. £50K a year for three years), training and continuous professional development,² and peer review. PHF also made available a discretionary fund (of c. £150K a year) to support emergent issues that were relevant to the programme aims.

Our Museum was overseen by the PHF Arts Programme Committee (until a restructure at PHF in the Summer of 2015) and a Steering Group chaired by the Committee advisor who developed the initial concept and comprising senior stakeholders from the museums' and galleries' and wider social sectors. The programme was managed by an independent, part-time Project Director, who reported to the Head of the Arts Programme (now the Director, Grants and Programmes). It was supported by two independent evaluators, who later in the programme also provided some developmental assistance to organisations (as 'Critical Friends').

Each participating museum and gallery appointed a Lead Contact and, in many cases, a Coordinator, to act as conduits for information and communication between the programme consultants (the Project Director and evaluators) and their organisations. They also identified a number of Community Partners to work alongside them on the programme.

A more detailed account of the evolution of the Initiative and programme arrangements can be found in the Project Director's interim and final report and the evaluation team's final report³.

² See later in this report for more details on the training and continuous professional development that was provided.

³ *Communities and Museums as Active Partners: Emerging Learning from the Our Museum Initiative*, Dr Piotr Bienkowski for Paul Hamlyn Foundation, November 2014; *No Longer Us and Them: How to change into a participatory museum and gallery – Learning from the Our Museum programme*, Dr Piotr Bienkowski for Paul Hamlyn Foundation, April 2016; *Our Museum Special Initiative: Summary Report of Evaluation*, Gerri Moriarty and Sally Medlyn, June 2016.

About this review and report

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The purpose of this review was not to assess the impact of the programme or its success in meeting its objectives, as this was the focus of the main evaluation. Rather, the aims were:

- A. To enable PHF and partners involved in *Our Museum* to understand the range of perspectives on:
 - a. The strengths and weaknesses of the structure of roles and responsibilities, and the ways in which they were carried out; and
 - b. How these impacted on the success or otherwise of the Initiative as a whole; and were they fit for the purpose and objectives of the Initiative?
- B. To examine the processes used by the Initiative to enact these roles and responsibilities e.g. evaluation visits, peer reviews and lead contact meetings, steering group meetings, critical friend meetings, and to analyse participants' views of their effectiveness.
- C. To enable PHF and others to consider the implications of the findings for work in other contexts in the future.

The review took place between November and March 2016. After a briefing by the Project Director and PHF evaluation staff, we reviewed some key background information about *Our Museum*, including research reports that informed the development of the programme, interim programme reports, and the evaluation framework. We then consulted participants via a mix of meetings, one to one interviews and visits. In total, we talked to just over 50 people, including PHF staff, Steering Group members, programme consultants, staff from all nine of the museums and galleries that took part and their community partners. Emerging themes from these consultations were discussed with the PHF evaluation team and *Our Museum* Project Director and evaluators. This report captures the main findings and our assessment of what we heard.⁴

We are extremely grateful to everyone who generously gave up their time to speak to us as part of this review. It's important to note, however, that while we have spoken to a fairly large number of people, we haven't spoken to everyone who has been involved, or explored every issue in depth with every participant. *Our Museum* has been a long and complex programme and we cannot hope to have fully captured the experience of taking part in a short review of this kind. Rather our focus has been on those issues that seem particularly important to highlight for the future, both for PHF and for other participants.

⁴ The Project Director and PHF staff commented on a draft of this report.

Our Museum was designed to encourage and support experimentation and learning. In our view, it is essential that the programme arrangements are approached in the same way. As one participant said to us – ‘*it’s really great that PHF are doing this review*’. There will always be ups and downs on any long-term programme, things that work really well and others that don’t. There will also, inevitably, be a range of perspectives on things that happened and differing levels of recall. While we have tried to faithfully reflect what participants have told us, reviewing is a human process and inevitably we will have misunderstood some things and given others an emphasis that some will disagree with. Nevertheless, our hope is that the conversations we have had with participants, and the contents of this report, are helpful in stimulating further reflection and learning and a more complete picture of the programme to emerge.

We understand PHF has no plans to run other Special Initiatives in future, but we hope these reflections and perspectives will be useful in thinking through the design of any future programmes, especially those designed to support organisational change, involving a cohort of funded organisations working together, or characterised by a more engaged funder-grantee relationship.

A note on terminology

In the sections of the report that follow, we use the term ‘participants’ to refer to all those who took part in *Our Museum* in any capacity (including the Project Director, evaluators/Critical Friends, PHF staff, Steering Group members, and participating museums and galleries and their Community Partners).

We use the term ‘participating museum or gallery’ to refer to the cohort of organisations that received funding and support on the programme.

We use the term ‘central programme team’ to refer to the Project Director, evaluators/Critical Friends, and PHF staff who have been involved in *Our Museum*.

A note on lived experience

Before we turn to the main part of this report, we wanted to comment briefly on the overarching impression of the programme and the experience of taking part that we gained from talking to those who have been involved.

Everyone we spoke to was strongly supportive of *Our Museum's* overarching mission to embed participation and deepen dialogue and power sharing with communities. This agenda was discussed in the context of obligations on publically funded institutions to open themselves up to scrutiny, opportunities to transform people's lives for the better and prove that *'heritage and culture are not luxury items'*, and ways of ensuring museums and galleries remain relevant and survive in difficult times.

The *Our Museum* programme was regarded as particularly pioneering in its focus on mainstreaming participation, its support for reflection and learning, and the long-term nature of its commitment. There was real appreciation for PHF in tackling this important agenda in this particular way after years of piece-meal, project-based funding:

'It was a radical thing to do, I've never seen anything like this in twenty years of working in this sector.' (Lead Contact, participating museum/gallery)

'I think it's absolutely fantastic that Paul Hamlyn are doing this. Really, a big thanks to Paul Hamlyn for doing this.' (Community Partner, participating museum/gallery)

Though it was not our brief to examine impact, most of the museums and galleries that took part told us their organisation had gained a great deal from the experience and that they now had an interesting story to tell others:

'It's been really helpful. It's had a massive impact, it's pretty much responsible for the great things we're doing now.' (Staff, participating museum/gallery)

'We now have a new category of people associated with the museum. There's staff, there's volunteers, and there's community partners. It's an honour to feel part of the museum'. (Community partner, participating museum/gallery)

Participants seem to have had a mix of experience on the programme, but everyone agrees it has been extremely challenging at times:

'It's been brilliant and awful and hard and exciting. It has been a real roller coaster for all involved!' (Lead Contact, participating museum/gallery)

'It's been the most professionally rewarding activity I've ever been involved with' (Staff, participating museum/gallery)

'There have been frustrations and it has been challenging. Sometimes things have manifested themselves negatively' (Coordinator, participating museum/gallery)

'It's been very enjoyable and stretching because of the way PHF work and the ability of the people involved on the Steering Group. It's been really fulfilling'.
(Steering Group member)

In our view, the challenging nature of the experience is hardly surprising given the tough task the programme set itself: to change culture and practice in nine very different organisations (in terms of purpose, size, and governance arrangements) that are geographically spread across the UK (and operate in very different political, social and economic contexts), with some (but arguably not a huge amount of) funding plus some support; and to learn from this to help change practice in the sector as a whole.

What no doubt would have been a tough task at any time was also made considerably harder by the very challenging context in which this programme has operated, with deep funding cuts in the sector and a significant churn in staff and leaders within almost all participating museums and galleries.

In this review, we have tried, in so far as is possible, to unpick how task, context and programme arrangements have shaped experience, and the implications of this.

Experience and learning for next time

The remainder of this report sets out programme experience and learning under 10 themes that seem to us to be worth thinking about before embarking on a similar, long-term change programme in future.

Under each theme, we found much that worked well about programme arrangements on *Our Museum* that is worth repeating in future. We also make some suggestions about things that might be tackled differently.

A very brief summary of the points to consider next time (drawing both on what worked well and might be done differently) are highlighted at the start of each section, in bold.

1. Designing the journey with the end in mind

Key points: investing in a collaborative approach to programme design, developing a shared theory of change that articulates how working with a particular cohort will support sector-wide change, drawing more explicitly on relevant experience and learning from other sectors in designing programme arrangements.

We are aware that a considerable amount of thinking went into designing the *Our Museum* programme. This included consideration of what an institution that properly embedded participation might look like, which informed the development of the four outcomes, and how to help institutions bring about positive change, which informed the package of funding and support for participating museums and galleries. The Project Director discussed programme aims and support structures with participating organisations and their partners before the programme was signed off, to gather their opinions and feedback.

Most people we spoke to in this review were familiar with the four outcomes, and felt they provided a useful framework for their work, even if they did not all refer back to them regularly. However, some people told us they felt that the programme might have benefitted from additional early reflection on what the programme as a *whole* was trying to achieve and how best this could be encouraged:

‘The first meeting was to discuss the first batch of applications from museums. We didn’t really have time to think about the ambition and scope of the programme. I think that once the Steering Group was established, just pausing for maybe three or four meetings to properly check the aims and processes, may have been helpful. It would have slowed things down, but it would have been useful’. (Steering Group member)

'The global premise they were trying to test was valid... but they could have been a bit more questioning about how culture has been devolved, the capacity in different parts of the sector and the politics that drive decision-making. Lots of funding bodies don't grasp the consequences of devolved cultural policy. The playing fields are very different.' (Staff, participating museum/gallery)

In part, this sentiment may reflect the fact that there was a great deal of change in personnel in museums and galleries during the course of *Our Museum*, from the research to the application stage, and from application to the programme itself. There was also some change in Steering Group members over the course of the programme. In a long-term programme, this inevitable flux and change makes it harder to sustain a shared theory of change and sense of collective endeavour. We are aware the Project Director took steps to explain programme aims and approach to new participants as they joined. In future, establishing the Steering Group slightly earlier to allow more time for members to reflect on, and perhaps to adjust, programme-wide structures and theory of change (as well as revisiting these at intervals with all participants) might be helpful.

Our Museum was very clearly about changing culture and practice in a particular cohort of organisations *and* about utilising learning from that experience to help change the wider sector. Programme leaders began to carry out some wider dissemination, influencing and advocacy work part of the way through the programme, as soon as they felt they had lessons to share with the sector. These emergent messages were captured in the interim programme report⁵. They were also disseminated via a multi-media website and various showcase events – elements of the programme that developed organically as learning and change mechanisms became clearer.

While we heard some positive feedback about these elements of the programme, some people we spoke to felt that the focus on wider sector change had come fairly late in the process and could perhaps have been better integrated from an earlier stage:

'Having a better understanding of outputs from the start would have been helpful – the websites, showcase events and reports'. (Lead Contact, participating museum/gallery)

'A strategic approach is important... There's an interesting question for PHF about this. We might have done good work in these nine organisations, but the bigger picture is the need to continue to advocate this agenda through other aspects of their work.' (Steering Group member)

⁵ *Communities and Museums as Active Partners: Emerging Learning from the Our Museum Initiative*, Dr Piotr Bienkowski for Paul Hamlyn Foundation, November 2014

'There is a body of work about cultural change, and if you were to try to solve this by committee you might get stuck, you have to start somewhere. But it's important to think about what actually changes things... The outputs that have been produced all look good, but I guess the question is how people will use them... what we really need are senior advocates, people who... are saying this works, it's messy and difficult but it's important and it works. Resources are useful, but credible leaders are more important.' (Central programme team)

For us, this last point raises an interesting point, not about the timing of dissemination or influencing work, but about the strategy for this. In turn, this leads to an interesting question about how the twin goals of the programme (improving practice in a particular cohort of organisations and driving sector-wide improvement) relate to each other.

We are aware that considerable thought went into the decision to invite those organisations that had already participated in the research phase of *Our Museum* to apply to take part in the funded phase of the programme. As a diverse group of different museums and galleries, the cohort offered the opportunity to generate learning of wide applicability. PHF were also keen to continue to work with organisations that had been open about their own challenges and asked for support to tackle them. While these are good reasons to continue to work with participants, it might be helpful in future to give some further consideration to how programme aims and choice of participants might relate and the implications for how a programme is run.

So, if it is thought that wider sector change is encouraged through inspiring stories from an exemplar cohort, then working with organisations with a pre-existing reputation for good practice (as happened on *Our Museum*) makes perfect sense. However, if making the case that any institution can progress is key, it might be helpful to recruit a wider range of organisations, including more that regard themselves as at the very beginning of their change journey. If evidence is seen as driving wider sector change, then the key question becomes what types of evidence need to be collected to make the case and who is willing and able to participate as a learning partner to produce this. If developing ambassadors for change is centrally important, then participating organisations' experience on the programme and the way they are supported and motivated to inspire others might be key.

As people who usually work in other sectors, not in heritage or culture, we are aware of many other long-term change programmes that support a cohort of organisations in order to achieve wider sector change. In future, early engagement with those involved in funding and running such programmes may be useful in bringing additional insight and ideas about the strategy and arrangements that support change at both levels.

Finally, a few of the participating museums and galleries, and a few of the Steering Group members we spoke to, queried whether learning about PHF's own approach to grant-making and supporting change was also an objective of *Our Museum*. We understand this was not an aim of the programme, however it seems to us that the programme has generated lots of useful learning for PHF.

'This is about organisational change, but was it also about funding bodies changing? Did PHF go into this saying "are we doing this right?" Was it explicitly set up in this way?' (Staff, participating museum/gallery)

2. Creating the best starting point

Key points: checking appetite and capacity to get involved in a long-term programme, negotiating roles and expectations carefully, engaging leaders within participating organisations at an early stage, building in a scoping/testing phase at the start to allow participants to check and consult more widely on their plans to ensure they are still appropriate and feasible.

The 'contracting' phase at the start of any programme is incredibly important in clarifying expectations and laying the foundation for productive working relationships. In a long-term programme, such as *Our Museum*, where there is likely to be significant turnover in staff and leaders in participating organisations, contracting is probably best conceived as an on-going process rather than a one-off event.

The contracting process on *Our Museum* was arguably more complex and challenging than might be the case with other long-term programmes, because of the way that organisations entered the programme (as research participants subsequently invited to apply for a funding programme). As outlined in the previous section, the decision to invite the cohort of organisations that had taken part in the research phase to apply to take part in the funding phase of the programme was made after careful consideration and for good reasons. However, a few people we spoke to felt the decision to restrict applications to this pool of organisations may have meant that some of the museums and galleries did not have the real appetite for change that other potential participants might have had:

'A weakness was that it wasn't an open application process. Despite PHF's best efforts, and even with enormous support, there were a couple of organisations that couldn't write a good enough bid. It became about getting them over the bar.' (Steering Group member)

As part of the application process, PHF/central programme team emphasised that the programme needed to be actively supported by Directors of participating organisations. However, a few participants we spoke to felt that more upfront testing of capacity and commitment to take part would have been helpful in increasing the chances of successful participation:

'I think we needed to have asked if they had the appropriate level of governance and financial management in place to handle this. If they hadn't that's not necessarily a reason to reject anyone, but we could have then put the support in from the start as the expectations would have been clear.' (Steering Group member)

From the central programme team's point of view, it was clear from the invitation process, and the peer review that took place as part of the draft application stage, that an invitation to apply did not mean automatic acceptance. A few of the participating museums and galleries we spoke to recognised that their bids were put together quite quickly and that they could

have done more to engage leaders and think through the capacity implications of taking part. However, they also emphasised their surprise at what they perceived to be fairly harsh criticism of their organisation's application and initial plans as they felt they had been selected for demonstrating good practice.

'We thought they'd done their research to know these were best practice places, so were surprised they were then criticised so much'. (Staff, participating museum/gallery)

For us, this perhaps illustrates the challenge of trying to change a relationship dynamic from a research partnership (two parties jointly exploring the issues in order to increase the knowledge base) to a funding relationship (with associated ideas about power and accountability, of which more later). This transition may have been complicated by the fact that despite considerable efforts to create a sense of shared starting points (including workshops as part of the LUCID market research and Dr Lynch's participatory research), not every participating museum and gallery agreed with judgements about the state of their existing practice at the start of the programme.

Some of the Lead Contacts and Coordinators we spoke to told us they had inherited programme plans from senior staff who had subsequently left their organisation. In some cases, these plans had not been consulted on very widely before submission. This meant that Lead Contacts and Coordinators were sometimes left to deliver programmes of work that they didn't fully understand and they, and their organisations did not have a particularly strong sense of ownership over.

Perhaps partly because of this, staff from some participating museums and galleries told us that they had not fully understood at the start of the programme (and in some cases for much of the first year) that this was an organisational change programme, not a participation project. Participants recognised that the central programme team, particularly the Project Director, had made huge efforts to meet with new staff and explain the programme's goals. Nonetheless, they emphasised that they still found this hard to grasp at first, and that this made it difficult to explain the programme to other staff and to community partners:

'We didn't quite understand it was an organisational change programme for much of the first year of the programme. It might have been made worse by staff changes here. But also I don't think we really understood what was meant by organisational change'. (Lead Contact, participating museum/gallery)

'It was only a year or so into the programme that we actually understood what the programme was and could be about...So it's only in the past year that we are really seeing the impact of it...It's just about to take off!' (Lead Contact, participating museum/gallery)

If they had fully appreciated the focus on organisational change at an early stage, some of these people told us they would have made more efforts to engage senior managers, Directors, and trustees in their work.

'If I was doing this again, I'd try to get more active involvement of senior managers, not just the verbal nod. So do we really want to get involved? Do we have vision for the next three years? It was quite hard as a junior person to do this.' (Lead Contact, participating museum/gallery)

The chance to spend more face to face time with the Project Director in Lead Contacts meetings (which were instigated part way through the programme), and to attend the first peer review seem to have been helpful in improving understanding of the programme and clarifying expectations. Staff and partners at several participating museums and galleries were keen to highlight their appreciation for the fact that the Project Director and PHF had given them the opportunity to rethink and reshape inherited plans in their first year, to ensure they were still appropriate and deliverable:

'The (bid writer) left and staff didn't know how to do what was planned. Piotr⁶ and PHF were very lenient and forgiving and helped the team find out what they could do with the capacity they had' (Director, participating museum/gallery).

If museums and galleries were to take part in any future programme of this kind, it may be worth consulting more widely on plans at bid-writing stage and testing and challenging these to double check they are appropriate and feasible on acceptance. If PHF were to run a similar programme again, it might be worth considering if a 'quarter zero', or short period for additional scoping/testing, might be built in at the start to check that successful applicants had done this and that plans were still appropriate and deliverable given changing circumstances.

⁶ Dr Piotr Bienkowski, the Project Director

3. Balancing direction with flexibility

Key points: promoting core change principles rather than particular structural models, exploring ways to surface and share assumptions about what ‘good practice’ looks like

Though *Our Museum* was guided by the four outcomes, it was conceived as an exploratory journey, in which participating museums and galleries, their community partners, programme consultants and the funder would learn more about the issues as the work progressed. The permission, encouragement and support to try new things, quite possibly fail, reflect, learn and adjust goals and approach was seen as a hugely valuable aspect of *Our Museum*.

‘Partners were amazed to get funding for learning, and where you could fail.’
(Lead Contact, participating museum/gallery)

‘It’s been great to have the permission and resources to try things and learn, it’s been amazing’. (Staff, participating museum/gallery)

It strikes us as a tricky balance to get right between offering space for participating museums and galleries to experiment while at the same time keeping a close eye on overall programme objectives and ensuring programme investment is well spent. Most participants recognised this. For some, the programme leaders struck exactly the right balance between direction and flexibility:

‘I think PHF have engaged with this with both the head and the heart. They have been as interested in the journey and the outcome. They’ve made it ok to fail. It’s been really refreshing.’ (Staff, participating museum/gallery)

‘PHF were very flexible, it’s been tremendous. Traditionally we would be beholden to the original application. But we have done some quite different things, with PHF’s agreement.’ (Lead Contact, participating museum/gallery)

‘There’s lots of risk involved in this kind of programme...it’s a long-term investment, working with a number of institutions. You could have got to end having dissipated lots of money without achieving much... They managed it well, in a mature and sophisticated way’. (Steering Group member)

For others, however, the blend of direction and flexibility on the programme worked less well. In some cases, staff at participating museums and galleries seemed not used to having the freedom to define their own trajectories in a funded programme. In other cases, staff told us they perceived ‘mixed messages’ from programme leaders; they were left feeling confused on occasion when they tried to take action and it did not seem to be what was wanted.

'The process was very vague and very demanding. It felt like there were a series of invisible hoops'. (Lead Contact, participating museum/gallery)

'PHF tell you "you can do what you like, but we want to see it first". Then you tell them and they say "oh don't do that!" I personally found it immensely frustrating'. (Community Partner, participating museum/gallery)

'The message was try lots of different things, don't worry if you fail, be brave. But this wasn't necessarily carried through. It might have been better to have been more prescriptive all along if that was what they wanted.' (Lead Contact, participating museum/gallery)

From the central programme team's perspective, participating organisations were engaged in their own change journey, not one determined by programme leaders. Their feedback was therefore focused on progress towards goals that each organisation had set for itself, and any changes in approach that the team judged were necessary to help meet these goals. However, some staff and partners at participating museums and galleries felt that a particular model of practice or approach was being promoted through the programme, if not always openly expressed. The initial idea of having a Steering Group for each institution, comprising a certain number of staff and community members, was the example most often cited in this context. Programme leaders promoted this idea initially as a way of ensuring that participating organisations developed and managed their programme in genuine partnership with community partners, rather than relying on them to 'rubber stamp' decisions that had already made (something highlighted as an issue in the research phase of the programme). However, some participating organisations felt this model was not the best way to achieve these ends in their particular context. The central team recognised this and, as the programme developed, adopted a more flexible approach to change focused on core principles that could be implemented in different ways. This change was widely welcomed.

'The problem was a mismatch between how PHF wanted it to be run and what we felt worked best on the ground. We had the feeling we should be setting up a community advisory panel, but we felt this would be a step back for us... We could see this could work well in other museums, but it wasn't right for us'. (Coordinator, participating museum/gallery)

'We've realised over time that it's not just one thing...there are very many different ways to approach it. Small changes add up, different things work in different museums...For example, we always knew that the external voice was really important, but now we've learnt that external voices vary. So community partners are one, but there are roles they can and can't play because of their position. Then there are critical friends and evaluators and peers. They are all different external voices and are all needed but are useful for different reasons.' (Central programme team)

In any context, we all hold notions about what 'good' looks like, informed by our values and interests, previous experience and expectations. If PHF were to run a similar long-term change process in future, it might be helpful to find ways for participants to surface and share these notions, more explicitly, and at an earlier stage. Use of scenarios and case studies can be a very helpful way to do this. We know some activity of this type did take place at peer review; it seems to us that this could be a valuable element of any future programme.

3. Balancing support with challenge

Key points: taking care with feedback and delivering challenging messages in person where possible, ensuring programme Leads within participating organisations are adequately supported and appropriate mechanisms are in place to take forward programme learning and remove barriers to change, building in bespoke organisational support and targeted training from the start, involving community partners in designing and delivering training.

The *Our Museum* programme was never intended to involve a ‘tick-box’ approach to funding. It seems entirely appropriate to us that the programme consultants, PHF and the Steering Group provided participating museums and galleries with support and also challenged and stretched them.

For some participants, the central programme team struck the right balance between challenge and support:

‘PHF were equally evil as lovely! And they needed to be both things...If they hadn’t said, “no you have to change”, to have pushed us hard, to have asked the difficult questions and prodded us, we probably wouldn’t have changed. But when we needed to shift approach, they really supported us at that stage’. (Lead Contact, participating museum/gallery)

For some staff at participating organisations, support from the Project Director, the PHF Director of Grants and Programmes, and the evaluators was transformative. These staff told us they received support that was beyond their expectations of a programme funder, and was greatly appreciated. For some of the museums and galleries that experienced financial and other difficulties during the course of the programme, wider organisational support provided by programme leaders and PHF was seen as invaluable in getting them back on track.

‘Piotr gave amazing advice. I would have backed off making difficult decisions without his support...with them backing me...I felt I’m doing the right thing, I have this entire organisation behind me...It gave me an awful lot of confidence in my decision-making’. (Director, participating museum/gallery)

‘We found the support of the programme invaluable, not just from other organisations but from the core team of Piotr and Régis’⁷ (Lead Contact, participating museum/gallery)

However, other participants felt pushed too hard at times. Several people told us they or their colleagues felt ‘bruised’ by ‘harsh’ or ‘brutal’ feedback at various points during the programme. Feedback on progress and plans at the end of first year was a moment highlighted by a number of people.

⁷ Régis Cochefert, Director, Grants and Programmes, PHF

'There was a lot of stick and not a lot of carrot. We felt bashed up rather than being pushed...The idea was to encourage learning and sharing but if you react like this, people just back off, then they don't share, they clam up. It's a behavioural cycle'. (Staff, participating museum/gallery)

This experience of being pushed too hard may reflect different expectations of the programme, in particular the extent to which participants felt they were *'signing up to be challenged'* (see point 2, above). It also seems to relate to the way in which challenging feedback was given to participants in the first part of the programme. For example, while staff at some museums and galleries recognised that they had not made huge progress in year one, they told us they disliked receiving challenging feedback on their reports via email; they would have appreciated the chance to meet with programme leaders to discuss progress in person. There was wide recognition that feedback was much more skillfully and appropriately handled as the programme developed.

This experience may also relate to the fact that some Lead Contacts and Coordinators lacked adequate senior level support from within their own organisation at certain points during the programme. Being on the receiving end of some fairly robust challenge from a funder in this context may well have felt uncomfortable. Organisations participating in a programme of this kind in future clearly need to ensure mechanisms are in place to provide adequate support to staff members in Lead roles, as well as to take forward programme learning and address blocks and barriers to change.

It seems to us that the lack of a proper support function was also an important reason why the programme was experienced as overly challenging by some participants. The training contract issued at the start of the programme to provide support to participants, particularly around reflective practice, was terminated shortly after it began. The time running up to and immediately following the termination of the contract seems to have been quite a difficult period in the programme's life:

'(the agency) did a huge amount of damage that led to people doubting the efficacy of the whole programme.' (Director, participating museum/gallery)

'The action research element got a bit lost and this was a core part of it, the idea of a live lab for learning. That got lost – so it became a bit pass/fail almost, which was a shame'. (Staff, participating museum/gallery)

'We decided to base training and development on reflective practice. With hindsight it was a mistake because it was a non traditional programme but we went for a very traditional approach to training... if reflective practice was key, we should have run this through all the meetings.' (Central programme team)

Lead Contacts meetings were established in order to try to fill some of the gap left by demise of the training contract (as well as to update participants on programme developments and prepare for peer review etc). This meeting was highly valued by participating museums and galleries as a source of peer support (see point 5) and an opportunity for more, direct contact time with the

Project Director. It also provided a forum for greater co-design of programme arrangements, including for Lead Contacts to identify a role for the evaluators as 'Critical Friends', support that was generally regarded as extremely helpful (see also point 8). While tremendously useful, however, everyone we spoke to agreed that both these developments came about rather later in the programme than was ideal. (Resource constraints may have been relevant here, as the Project Director was originally commissioned to work just two days a week on the programme at the start). Without a proper support function in place from the very beginning, and with a robust approach to feedback and a helpful but '*searching*' approach to evaluation, it is perhaps understandable that the balance between support and challenge may have tipped towards challenge for some of the museums and galleries that took part.

Our sense is that there were various different types of support that may have been useful on this programme. Participating museums and galleries may have benefitted from some bespoke organisational development assistance, in particular help in the early stages of the programme to develop a vision for participation in their institution that was properly owned by their colleagues and partners and a clear change plan (building on their applications). They may also have benefited from periodic support to design and run big meetings or handle 'difficult' internal conversations (the evaluators acting as Critical Friends provided some very useful support of this kind.) Although the original training contract was terminated, and activity reshaped as bespoke support for each organisation, our sense is that some common training might still have been helpful for the whole cohort. In particular, a light-touch introduction to organisational change concepts, approaches and tools might have been helpful (see also theme 10). Some support to help Lead Contacts to understand more about their own practice as change leaders/facilitators might also have been worthwhile.

Programme participants at all levels recognised that, with hindsight, there might have been a bigger role for community partners to get involved in designing and delivering training, widening the pool of skills and expertise participants had access to and challenging the notion that capacity building was something done *by* professional staff *to* community members. This was an important piece of learning to emerge from the programme that is worth considering for the future:

'(With hindsight) I would have looked for community partners to have a bigger role in training and development of museum staff, not just the other way around'. (Central programme team)

4. Creating the right conditions for peer support and learning

Key points: establishing a forum for peer exchange and support from the beginning and using this to co-design other arrangements, helping participants to get to know each other and understand each other's plans as early as possible, developing some shared principles/protocols for communicating with a network of funded organisations.

The chance to meet and engage in reflection and learning with peers was seen as a hugely positive aspect of the *Our Museum* programme. For participants in all roles (consultants/PHF, Steering Group members, and staff and partners at participating museums and galleries) interaction with peers seems to have been a source of inspiration and support both with and in some cases beyond programme activity.

Early grouping of museums and galleries into action learning sets was not particularly successful, as staff didn't always feel they had sufficient in common with the organisations they were matched with and the geographical distance between matched organisations meant visiting sometimes felt impractical. As the programme developed, museums and galleries generally identified the groupings that made sense to them and several people told us how useful visits to these organisations had been. Staff at a few museums and galleries told us it would have been useful if there had been a more structured opportunity earlier in the programme to find out more about other organisations' plans, as this may have facilitated earlier matching of participating organisations on thematic issues and plans. However, we understand from the central programme team that when money was made available to support learning exchange only a few participants took this up, and concerns were also expressed about the time commitment that would be involved in any additional learning and sharing sessions.

'It felt like a better plan, leaving that open with a pot of money to bid for to go and visit places that reflected your interests, the structure didn't really work well.' (Lead Contact, participating museum/gallery)

'Getting people together in smaller groups doing the same things would have been helpful. For example, we could have learnt a lot from X on X, but it was a bit too late by the time we learnt about this...and X, they could have learnt from us on that'. (Director, participating museum/gallery)

With the demise of the training contract, Lead Contacts meetings helped to fill an important support gap (see point 4). These meetings were generally regarded as a very positive aspect of the programme arrangements and a valuable forum for peer support (as well as updating on programme developments, preparation for peer review, and planning of dissemination activities).

Most people who attended felt the meetings became more useful as the programme progressed and imparting of information to Lead Contacts was increasingly balanced with sharing of insights *between* them. In terms of learning and sharing between participants, a few Lead Contacts told us they found the meetings less useful as they felt organisations were so diverse that it was sometimes hard to see the transferable learning to their particular context:

'At the start, it felt more like updating and box-ticking, though there were some opportunities to network outside of meetings. But it became more focused, more of a better workshop kind of feel. I didn't really understand people's plans until then as there was no space to talk.' (Lead Contact, participating museum/gallery)

'It was really interesting to talk to each other, but because of the range of different types of organisations, sometimes I don't know how useful it was. So we could see what X were doing and think that's really great and we'll watch your videos, but we couldn't really translate it to our context.' (Lead Contact, participating museum/gallery)

If PHF were to run a similar programme in future, it seems important that some kind of Lead Contacts forum is built in from the start, with a clear role within any wider support function. It might be worth exploring whether there are other (online) ways of providing information updates, leaving more time in meetings to work together on common issues. Lead Contacts meetings were occasionally chaired by participants and this seems to have been a good way of creating a sense of ownership and honing skills relevant to the programme that is worth repeating in future.

Annual peer review provided an opportunity for everyone involved in *Our Museum* to come together to engage in peer learning. Feedback on peer review was mixed, but most people found some aspect of it useful and, for some, it was a real highlight of the programme. Peer review was particularly valued for exposing people to new ideas; several people mentioned Nina Simon⁸'s talk as a hugely inspiring, 'light bulb' moment that transformed their thinking about their work. For some, peer review was a rare and welcomed opportunity to leave everyday responsibilities behind and reflect on their work from a different perspective. Several people told us that spending time with their own team and community partners at peer review was an important bonding experience.

'Peer review was great, we went together...it gelled you as unit...And learning from the other organisations, being pulled out of your usual environment. It was good to be forced into a new space.' (Lead Contact, participating museum/gallery)

⁸ Nina Simon is a museum director, former design consultant and author of the Museum 2.0 blog. See: <http://museumtwo.blogspot.co.uk>

'It was absolutely fascinating – the workshops that were held about equality and diversity within art. It was really, really interesting.' (Community Partner, participating museum/gallery)

'It was fantastic, really useful. It's not often you get the chance to be able to get together with other staff as well as Community Partners...It really helped create momentum'. (Staff, participating museum/gallery)

However, we also heard some criticisms of peer review, in particular in year one, where some staff and partners at participating museums and galleries felt the tone was too didactic and the quality of some of the facilitation was poor. Several people also expressed concern that some Community Partners may have found the experience a bit daunting. In a small number of cases, Community Partners told us that they had not been fully briefed by their museum/gallery about the nature and purpose of the programme before coming to peer review, which may have contributed to this:

'If you were used to contributing it was fine, I'm always happy to! But perhaps some people are less used to this'. (Community Partner, participating museum/gallery)

'It was not really an atmosphere conducive for them (Community Partners) to share their experiences. It was quite intimidating really. I would have loved to have brought X but if we'd put them in that traditional conference space, with round tables and presentations and high standards in terms of understanding of language, I think that would have been really difficult.' (Coordinator, participating museum/gallery)

Most people told us that peer review became much more enjoyable and productive in years two and three, as lead contacts came to play a greater role in co-designing the event and participants got to know each other better. However, the biggest overall criticism of peer review was that the event cost too much money and felt too lavish. Though participants appreciated PHF's concern to *'treat us well'*, they felt this set the wrong tone for the programme. Most people we spoke to felt that hosting the event at a community venue, or at one of the participating museums or galleries, would have been more in keeping with the ethos of the programme.

'The community partners didn't get it. They were thinking: "why are we here, all these people sitting around and navel gazing". We are fighting for survival...and then all these people are sitting round in this context. That was quite hard.' (Director, participating museum/gallery)

'It was good to have the space to hear others talk. But some of the Community Partners thought the costs spent on it were abhorrent'. (Lead Contact, participating museum/gallery)

Referring to both Lead Contacts meetings and peer review, some people emphasised the challenge of encouraging openness and sharing among peers on the programme. For some, encouraging openness was primarily about people getting to know each other, and there was some feeling that this could have been accelerated with different approaches to facilitation and more investment in social time around meetings. However, for others, a reluctance to share was integrally linked to anxiety about securing next year's funding and the funder/grantee relationship (see point 7) and to the way group dynamics were handled:

'It took time to build relationships with other museums on the programme, until they could be honest with each other... Because in a way you are comparing them, even if it might not be intentional.' (Lead Contact, participating museum/gallery)

'There was sense of a pecking order...It didn't create a feeling of trust, it felt competitive.' (Lead Contact, participating museum/gallery)

'We said from the beginning that we wanted museums to be open when things went wrong, but it felt like for a long time they didn't believe this. When we got into year two, it was as if it was easier for them to see how we would use the information and that we genuinely wanted them to learn and share, we weren't penalising them, it was the opposite in fact.' (Central programme team)

For us, these quotes illustrate the importance of taking particular care when communicating and working with a network of funded organisations, rather than with a single grantee. In this context, people can be understandably sensitive to comparisons and misinformation can travel fast. If PHF were to run a similar programme in future, working with a cohort of organisations, it might be helpful for participants to develop some principles and protocols to guide communication – e.g. setting out what type of information and feedback is shared with participating organisations as a group and what is shared individually, and what goes to different parties connected to a particular institution (in this case to Lead Contacts, Directors and Community Partners.)

5. Modelling what you want to achieve

Key points: trying to ensure ways of working reflect the nature of the task and the spirit of the programme, creating early opportunities for those taking part to get to know those making judgements about their progress, agreeing some principles to guide ways of working, encouraging all participants to take responsibility for proactively contributing ideas about how to design and improve programme arrangements and ways of working.

Participants, especially staff and partners from participating museums and galleries, naturally made a link between the strategic intent of *Our Museum* (to promote dialogue, involvement, collaboration, and power-sharing) and their own experience of working with others on the programme.

Staff and partners at some of the participating museums and galleries emphasised the very genuine, on-going interest the Project Director, Director of Grants and Programmes, and the evaluators took in their work, their learning and their organisation as a whole. There was also wide recognition that programme arrangements became more collaborative as *Our Museum* developed, creating a stronger sense of shared endeavor. The fact that PHF had commissioned this review was seen as a positive demonstration of PHF's commitment to reflecting on its own practice, being open, and to learning from others.

There were some aspects of the way *Our Museum* was designed and run, however, that participants felt jarred with the nature of the task they were engaged in and what they had understood to be the spirit of the programme.

Staff and partners at several participating museums and galleries felt the absence of a forum for engaging face to face with Steering Group members who were making judgements about their plans or progress was particularly problematic. They felt these judgements were more likely to be sound if they were informed by a more rounded understanding of their experience and context than could be conveyed in a written report. Being part of a process of dialogue around plans and progress was also felt to be important *in itself* on a programme of this nature. The absence of such a forum seems to have exacerbated a sense of inequity in power in the minds of staff at some participating organisations:

'The Steering Group were this unseen body with such power over us, but we never got to meet them.' (Coordinator, participating museum/gallery).

'The biggest issue for me was the Steering Group. All parts of Our Museum should have mirrored what they were asking us to do, and when it didn't it really jarred. Everything they set up and the whole way it was governed should have been in line with the four outcomes.' (Lead Contact, participating museum/gallery)

Our sense from talking to Steering Group members is that their intentions were quite the opposite; rather they put a huge amount of time and effort into providing feedback from a commitment to the programmes's aims and to improving programme outcomes. Our feeling is that participating organisations' perceptions could have been addressed with more opportunities for face-to-face dialogue at various (and especially earlier) points in the programme. The Steering Group did try to do this via a 'buddying' scheme that matched individual members with particular participating organisations. However, while some Steering Group members did manage to visit their designated organisation, this did not happen in every case because of Steering Group members' other commitments, a concern on some members' part about 'interfering', or because this offer was not taken up by participating museums and galleries. If PHF were to run a similar programme in future, it might be helpful to consider building in earlier opportunities for Steering Group members to meet participants face to face to build trust. A more flexible approach to on-going contact (e.g. by telephone or Skype, not just in-person visits) and some advance planning might make this relationship-building more feasible for busy professionals.

Some of the people we spoke to, including Steering Group members themselves, suggested that it would have been helpful to have included community partners on the Steering Group (e.g. national representatives of voluntary organisations). In their view, this would have given Steering Group members an opportunity to model the partnership dynamics that participating organisations were engaged in, as well as sparking some additional thinking about how to do this work well. One or two people felt that funded organisations should also have been represented on the Group. We understand these ideas were discussed when the Steering Group was set up, but it was felt that as the Group would be making recommendations about funding, this would not be appropriate.

'There's no perfect structure but perhaps putting in some more opportunity for reflection – we made participants go through a lot of that, but did we subject ourselves to that?' (Steering Group member)

'We should have had some community partners on the Steering Group, and maybe a couple of the funded organisations too. You want to share some of your power with the people you're working with and benefitting. There might have been some conflicts of interests, but I think the benefits would have outweighed that.' (Steering Group member)

We have already discussed issues about the costs of peer review, which were mentioned by some participants in the context of modelling the spirit of the programme (see point 5). In relation to peer review, several people we spoke to also highlighted a specific occasion when Directors met separately from other participants. While it was recognised that Directors would have their own set of issues to discuss and it was seen as entirely legitimate that they should meet separately, it was felt to be very important that they fed back to the rest of the group in order to help create an inclusive and equal dynamic in the room. This might be something that both programme leaders/event facilitators and Directors consider for next time.

Another issue raised by staff and partners at some participating museums and galleries was the process by which two organisations – Ryedale Folk Museum and the Museum of East Anglian Life – left the programme before the full three years were up. Staff at some participating organisations told us they were concerned about what they perceived to be the ‘*sudden disappearance*’ of the two organisations. We understand that programme leaders were concerned to maintain confidentiality until decisions were made, and that they did inform participants face to face at a Lead Contact meeting after this, expecting them to cascade the information to colleagues. Nonetheless, some participants felt more acknowledgement of this ending would have been appropriate.

‘Mention was made on the website of these seven organisations that they worked with, and then they said “we also did some work with these two”. But if they want to appear truly reflective, I would have liked to have seen more attention shown and description of what they did and why...’ (Lead Contact, participating museum/gallery)

For us, these points reinforce the importance of giving real attention not only to programme goals and tasks but also to the process of working together and to participants’ experience. On any programme, but perhaps especially one focused on changing relationships and equalising power dynamics, it feels important to try to ensure ways of working are congruent with the nature of the task and reflect the spirit of the programme. We understand that the Project Director visited participating organisations before the programme began to discuss how everyone could work together. In future, as part of the contracting stage of any new programme, it might be helpful to have a group discussion to agree some principles to guide joint working. Being able to refer back to a set of principles that are collectively agreed at the start might give all participants the confidence to constructively challenge unhelpful ways of working and put more appropriate arrangements in place. Given the inevitability of churn in personnel on a long-term programme, it might make sense to revisit and renegotiate these principles as a group from time to time.

6. Forging a new funder/grantee relationship

Key points: communicating the intention to create a new kind of funder/grantee relationship at the start and throughout the life of a programme, identifying symbolic opportunities to demonstrate that commitment.

PHF Special Initiatives, with their sustained focus on a particular issue, convening of a network, and investment in shared learning, create quite a different funder/grantee dynamic than is characteristic of traditional funding relationships. This approach to funding, together with Our Museum's substantive focus on organisational change, arguably took PHF's involvement in the internal workings of participating museums and galleries to a level that most organisations were not used to and some had not fully anticipated.

Staff at all of the participating museums and galleries found the engaged funder model challenging at various points on the programme (e.g. when dealing with challenging feedback, or when other organisational priorities competed for their time and attention). However, most told us they had gained significantly from the deep interest PHF and programme leaders had shown in their work and in their organisation. For a few participants, the chance to forge a longer-term, more engaged relationship with PHF was one of the real highlights of the programme:

'About 10 years ago, there was a move in the cultural sector towards more intelligent funding. PHF are absolutely behaving in this way'. (Steering Group member)

'I've never had a funder experience like this... This is a very new and innovative way of funding, really buying into relationships with organisations not just funding projects. I think it has spoiled me, I don't think I'll ever get the same thing from other funders.' (Director, participating museum/gallery)

'We called them a 'high maintenance funder', but that's a good thing, they showed real interest in what they're paying for and wanted to push you. Partners and staff were really impressed. (Lead Contact, participating museum/gallery)

'I feel I can still pick up the phone now for counsel. I don't have that relationship with any other funder in that way... In terms of changing and developing organisations, this programme model is really successful – creating open space for dialogue. I don't think we could have done this with other funders.' (Director, participating museum/gallery)

For a few participants, however, the engaged funder model felt more uncomfortable. To some extent, this experience seems to reflect different understandings and expectations of the programme and of the relationship with PHF/the central programme team (see point 2).

'I don't think we realised how engaged a funder they would be! Normally you just submit a plan and updates but they were all over us and were like "oh my god!" The relationship did improve though.' (Lead Contact, participating museum/gallery)

'It was very difficult for our trustees. The thought of another organisation dictating. That was hard.' (Staff, participating museum/gallery)

'You need to trust who you're working with, that's what leads to good outcomes....It has been very successful but on a couple of occasions it felt like they were very much in control and holding the purse strings.' (Staff, participating museum/gallery)

Some staff and partners at participating organisations also told us that they felt the central programme team did not always appreciate that *Our Museum* was one among many other major change agendas they were grappling with, albeit an important and high-profile one. It was not uncommon for staff from galleries and museums to weigh up the level of grant they received for the perceived amount of work involved in *Our Museum* and in relating to the central team/PHF. As the grant was only ever intended as *one form* of support for change (alongside others aspects of the programme such as peer learning), this again perhaps confirms a misunderstanding about the nature of the programme, which some participants acknowledged:

'People saw the funding and perhaps thought it was a project, even though this was not what was intended. If you look at the money just in those bold terms, you might ask should it have this disproportionately large impact on our time and work plans?' (Staff, participating museum/gallery)

'I think as a team we need to be stronger and chase the money less in future. It's a balance between focusing on the money and thinking about what you're achieving and what it costs you to service the whole machine.' (Director, participating museum/gallery)

'PHF, for the money, wanted something really groundbreaking. That was completely understandable, but while me and X were doing some really great things, the rest of the organisation was really struggling ...there was a bit of a mismatch between the museum and the funder.' (Coordinator, participating museum/gallery)

A few participants suggested that the way the finances of the programme were constructed, with a fairly small grant to each museum/gallery (though significant, especially for smaller organisations) but a large overall cost envelope of c. £3.2m (because of the size of the cohort and the costs associated with the central team, training contract and peer review etc) may have contributed to a mismatch of expectations. We understand, however, that the nature and level of funding was discussed and agreed with Directors while the programme was being developed and was felt to be appropriate, especially given that funding for change (rather than for projects) was so difficult to obtain.

The central programme team regarded applications for continuation funding after the end of *Our Museum* as one indicator of whether a new type of funder/grantee relationship had been forged through the programme. The team expressed disappointment with some applications as they felt plans did not flow naturally from the work organisations had undertaken on the programme and organisations had dropped the open, reflexive mode of communication that participants had worked hard to establish on *Our Museum*.

It seems clear to us from these experiences and perceptions that ideas about and expectations of the funder/grantee relationship are deeply engrained and the task of shifting traditional dynamics is not an easy one. In thinking about funder/grantee relationships in future, it may be helpful to reflect on these issues, and also to remember that seemingly small and insignificant events (e.g. Directors reporting back after peer review) can become totemic when working with a group of participants. Paying attention to symbolism and to language (picking up on and making conscious efforts to challenge use of constructions such as the 'golden girl' or the 'problem child') can also be helpful in signaling commitment to a new type of more equal relationship.

7. Harnessing the power of formative evaluation

Key points: building in evaluation from the start, keeping evaluation and support roles separate, designing evaluation to gather the range/types of evidence required to make the case for this work with different audiences, embedding self-evaluation to ensure progress is sustained.

Evaluation has been built into the *Our Museum* programme from the very beginning and has played a central role in supporting all participants' learning and identifying lessons for the wider sector.

The fact that the evaluation team were involved from the very beginning of the programme was seen as extremely important. With a high degree of turnover in staff and leaders in participating museums and galleries, some people we spoke to felt the evaluators were an important source of continuity and insight about the history of their organisation's involvement with the programme.

A number of the people we spoke to emphasised that the museums and galleries sector is not traditionally that experienced or skilled in using data and evidence to support improvement. Perhaps because of this, the evaluators approach was generally regarded as challenging. However, the majority of staff and partners at participating museums and galleries found their evaluation meetings and discussions with the team extremely helpful in encouraging reflection, identifying progress and learning and informing future work.

'It was adaptive evaluation that really worked. Even when we failed, it worked!' (Staff, participating museum/galleries)

'The programme was heavily evaluated by a team of evaluators. Having this team forced us to take the time to look at what we were doing and not doing. We've all run projects where we've written evaluation reports right at the end in a hurry, but this reflection was really helpful...Staff really valued the time they had to spend with the evaluator...Those individual members of staff, whether they realised it at the time or not, will utilise that learning in other jobs they go on to...It was a real strength of the programme' (Director, participating museums/galleries).

'They were more than evaluators, they were a sounding board...really intensive close evaluation was an amazing luxury' (Director, participating museums/galleries)

From the start, the evaluators seem to have played a very useful role in informally matching up museums and galleries working on similar issues. With the demise of the training contract, the evaluation team agreed to provide additional developmental support as 'Critical Friends', in response to requests from participating museums and galleries. The team had clear reservations about taking on this dual role, but did so for practical reasons to fill the support gap at an important point in the programme. The evaluators took steps to try

to manage any potential conflict of interest by, for example, only acting as Critical Friend to an organisation they were not evaluating.

Staff and partners at the majority of participating museums and galleries seemed to be comfortable with this arrangement. For them, it was generally more important to keep working with people they had already forged a relationship with and who knew their work, rather than beginning over with a new set of people. However, a few staff and partners found this dual role more uncomfortable, especially where there were issues about progress or relationships, and they were concerned about how information gleaned by the team in their support role might be used in their evaluation role. While this arrangement developed for entirely understandable, practical reasons, we agree with the evaluators that such a dual role is not ideal in future, not least since it raises the question of whose work is being evaluated.

'They were wonderful, insightful individuals and had a great view of the whole programme. They were able to give us lots of helpful advice. But with hindsight now, something happened with them that probably shouldn't have happened. We got on so well with the evaluators that they turned into Critical Friends... it changed the nature of what they were doing, they became part of needing to make it a success. Now I think that was perhaps not the best route to take.' (Lead Contact, participating museum/gallery)

'There was sometimes a sense that we hadn't done what they would have done. But this was our prerogative.' (Staff, participating museum/gallery)

In devising the evaluation, there was clearly a balance to be struck between evaluating the Initiative as a whole, and evaluation of each organisation's work. A couple of staff members at participating museums and galleries told us they would have liked more comprehensive evaluation of their own work, or more support to enable them to do this for themselves (the evaluators did provide some additional self-evaluation support in response to requests from organisations).

At the start of the funded period of the programme, the evaluators produced a baseline assessment, which was agreed with participating organisations. Staff and partners at some museums and galleries told us they would have liked additional support to ensure this captured the full range of work they were already doing across their organisation and to use the baseline to review progress and identify what might they might do next.

'The baselines were never referred to again, it would have been great to revisit them again as a group, then we could have done more with each other, every year looking at this is where we are and where we were.' (Director, participating organisation)

'We were already doing some good stuff, and they wanted us to stretch us. But we couldn't really see our own starting point, we weren't starting from scratch... They did try to do develop some baseline evidence, the Cake Report evidenced this really. But in our particular case it was still not clear which areas to focus on'. (Lead Contact)

With hindsight, staff from a few museums and galleries, and some members of the central programme team, told us they would have liked to have explored aspects of programme impact in greater depth. For example, there was interest in exploring impact on the different parties involved – e.g. on participating museums and galleries and their staff, on community partners and their organisations, and on individual community members etc. There was also some interest in longer-term evaluation that might track, for example, changes in staff attitudes and skills over time. In this context, the plan for the evaluators to re-visit participating museums and galleries in two years time was welcomed.

As outlined earlier in this report (point 1), a key question for us is what type of evidence on what types of issues is required to really make the case for embedding participation to different audiences. It might be helpful for PHF to consider this in the context of any further work they may choose to fund on this topic. We heard from several of the participating museums and galleries that they are currently considering how they might evaluate their own work in this area in future, in some cases with the help of the *Our Museum* evaluation team. This seems like an important issue for all participating museums and galleries to consider if efforts on *Our Museum* are to be sustained.

8. Deploying skills and expertise in support of programme goals and wider strategic agendas

Key points: supporting the Project Director to navigate and link up with PHF internal decision-making structures, exploring possible team structures for programme leadership, recruiting Leads with the appropriate blend of personal qualities and positional authority for the task, identifying other ways to harness the expertise of Steering Group members, contracting for additional expertise with care and with programme goals and wider strategic agendas in mind.

Everyone we spoke to as part of this review emphasised their respect for the very many talented and expert people who were involved in *Our Museum* at every level, on the Steering Group, at PHF, in the consultancy team, and among participating museums and galleries and their partners.

'A great programme lead in Piotr, a lot of thoughtful oversight from Régis and involvement of the evaluators and the role they played as they moved into a mentoring role and balanced that with evaluation. They were all critically important.' (Steering Group member)

There was wide recognition of the particularly tough role of the Project Director, who sat in a pivotal position between the Steering Group/PHF and participating museums and galleries. It seems to us that this role involved a complex, two-way act of translation between the programme's strategic intent and practical reality on the ground.

'I spent lots of time talking to Piotr and found him very good, very straightforward...He was the juncture between PHF and the museums, and he has done this extremely effectively and with a great manner.' (Director, participating museum/gallery)

'Piotr was stuck between us and PHF and the steering group!' (Lead Contact, participating museum/gallery)

It was never the intention that the Project Director be responsible for providing hands on support to individual museums and galleries (neither did he have the time/capacity to do this for nine different organisations). This was the function of the training agency. However, it seems to us that the Project Director's role may have been made more challenging by 'outsourcing' all of the training and support function to another agency (even if this contract had been successful). Having regular, face-to-face contact with staff from participating museums and galleries from the start (as was instigated with the Lead Contacts meeting) and some kind of role in the overall support package (e.g. in embedding reflective learning at those meetings) might have been helpful.

As their main point of contact with the programme, it is perhaps inevitable that participating museums and galleries tended to regard the Project Director as the face of *Our Museum* and on occasion to look to him to speak on behalf of PHF. Yet as an external consultant, the Project Director had limited, independent, decision-making authority and may have found it more difficult than a permanent member of staff to navigate PHF internal decision-making structures. More opportunities for the Project Director to have met with and learnt from external consultants running other similar programmes at PHF might have been useful, especially in the early stages of *Our Museum*.

We understand that PHF is not currently planning to run another Special Initiative at this time. However, if external consultants continue to have roles as convenors of networks of organisations working together on common issues (in whatever form) it might be worth thinking through what arrangements would help to make this work well. It strikes us that direction of a programme of this kind requires quite a wide range of knowledge, skills and attributes – including an understanding of participatory theory and practice, strategic insight, relationship building skills, an understanding of organisational/behaviour change, and strong communication skills. In future, it might be worth considering if a central team structure might be a more appropriate model for programme leadership than a single Project Director. A team structure might create more opportunities for mutual support and reflection among central team members. It might also allow matching of central team members with organisations that require specific skills and experience. The question of how a Project Director, or a team of programme leads, feeds into PHF management structures might also be worth thinking through. It seems to us that *Our Museum* has required input from and raised issues of relevance to grants management, evaluation, policy and communications functions at PHF. Having a programme leader/s reporting into a PHF leadership group might be a good way of making the link with wider PHF strategic agendas and ensuring that important learning is retained within the organisation.

From our conversations, it seems that most Lead Contacts tended to view themselves as managers/coordinators of their museum/gallery's involvement in *Our Museum* and conduits for information exchange with the central team, rather than as change agents in their own organisation. There were mixed views about the type of person who was needed for this role. Some participants felt that Leads needed to be sufficiently senior, to have the positional authority to tackle difficult conversations, remove blockages and get things done. (We heard from some participating organisations that original plans to back fill posts, allowing more senior staff to take on Lead roles, had been scuppered by events.) Others felt that personal attributes and passion for the topic area were more important than seniority.

We understand that the central programme team briefed organisations at the start of the programme on what was required from Lead Contacts and fed back on arrangements that were working well/less well. If PHF were to run another similar programme in future, it would certainly seem to be worthwhile spending some time articulating this crucial role and the qualities required to fill it at the start of the programme (and keeping this under review as learning progresses). As we've said elsewhere (see point 4), ensuring Leads have adequate senior level support from their own organisation, and perhaps providing some additional training on leading change, also seem important. Now that the *Our Museum* programme is over, participating museums and galleries might want to keep these points in mind as they consider how to continue to champion this agenda.

In addition to on-going advice from the Programme Director, consultants, and PHF staff, which was seen as extremely useful, some of the museums and galleries that took part would have liked to have tapped into the experience of Steering Group members to a greater extent. The points we made earlier about matching Steering Group members with participants (see point 6) are equally relevant here.

Finally on the theme of expertise, we have been struck by the large number of contractors who have played a part on the programme in some capacity. In some cases, this has clearly worked really well and the quality of input has been excellent (notably the Project Director and evaluators). However, it has also created a complex set of relationships to manage, and in a couple of cases participants felt that contractors (or proposed contractors) did not have the most appropriate skill set for the task in hand. We appreciate that it is challenging to contract on an exploratory programme, where tasks are evolving organically and it is not always clear what is needed. However, next time, we would just emphasise the importance of putting time into identifying the functions and tasks that are needed (in the context of overall programme objectives) and the skill sets required, recruiting the best people for these jobs, setting clear objectives for their work, and regularly reviewing progress. It seems sensible for PHF permanent staff to be centrally involved in this process in future in order to ensure that contracts are managed in a way that links to wider PHF strategic agendas.

9. Creating a shared vocabulary and narrative

Key points: helping participants to understand key concepts, having a strong, overarching narrative that sits above programme outcomes, exploring possible external support to help participants communicate programme goals and learning in a compelling way.

Finally, staff and partners at some participating museums and galleries told us that prior to the programme they had not been very familiar with key terms and concepts, such as organisational change or organisational culture. We were told that these (and other terms) were sometimes used by different people to mean quite different things. A couple of people mentioned that they had associated organisational change with restructuring or redundancies, which created a degree of unnecessary concern at the start of the programme.

'Language was an issue. And we don't always make people feel comfortable enough to admit this.' (Coordinator, participating museum/gallery)

'The wording that was being used was confusing for staff members. Whenever someone mentions "organisational change" everyone goes "arggh redundancies, I'm going to lose my job!", and so that set up a huge amount of resistance...I think we are there now, but it's taken two years for people to know that we are not after people's jobs...' (Staff, participating museum/gallery)

The task of reporting back on progress also felt quite challenging to some staff and partners, partly as a result of this issue about language and understanding, and also perhaps because participants were new to reflective practice and weren't sure what level or type of feedback would interest programme leaders. The Project Director's decision to produce a reporting template was much appreciated in this context (and had the added benefit of restricting the amount of information programme consultants needed to read to a more manageable level!) However, a few people told us they still struggled to express their learning in a suitable way, especially during the early phases of the programme:

'A lot of what was achieved is quite subtle, so it's difficult to report on.' (Lead Contact, participating museum/gallery)

'The language of community agency, reflective practice, it was all jargon, it was hard to explain to others, the whole process seemed too academic...I'm a practical person who gets things done, not a cerebral person who likes to map things' (Lead Contact, participating museum/gallery)

'There was a feeling that PHF want reports worded in quite a highbrow way. So it's ok to fail, but you need to word it in a way that makes it sound quite grand!' (Coordinator, participating museum/gallery)

The central programme team, however, emphasised that they were simply looking for honest reflections on experience and progress, without the gloss that sometimes characterises funding applications and grantee reports.

'We sometimes feel that they just use these buzz words and PR spin with nothing behind it.' (Central programme team)

We have not reviewed individual programme reports so are not in a position to make a judgement on this issue. To some extent, these perceptions might reflect wider issues e.g. concerns about securing funding and the funder/grantee relationship that we have mentioned elsewhere (see point 7). However, if they are genuinely rooted in lack of understanding of key concepts, then some further training of the type suggested in point 4 might have proved useful.

We understand that the evaluation team ran a session at the last peer review to seek feedback on the outcomes and success indicators used on the programme, and that this issue is covered in detail in their final report. It seems to us that although the outcomes framework was a useful touchstone document, not everyone made active use of it. It also strikes us that in the early stages of the programme some museums and galleries developed areas of work that while seemingly in line with one of the four outcomes, were not fundamentally designed to change organisational culture and practice. Our feeling is that having a stronger, overarching narrative about organisational change that sat above the four outcomes might have helped to clarify this focus at an earlier stage.

Finally, a number of participants highlighted in more general terms the challenges involved in communicating this agenda within their own organisation, to partners, and in the wider sector:

'The rationale for doing this work...from a long-term sustainable point of view, it's about growing the audience base. It's also about entitlement, we know we're not representative and the museum has a role to play in opening doors to people. We also know we've tended to operate in broadcast mode, this is changing but this is still the default mode. But it's not about being purely reactive either. It's about that fertile middle ground, where we can all gain by collaborating. But this is quite hard to communicate...And people often don't see this as relevant to their jobs. We've not been that good at articulating it as a museum and PHF has not always been able to do this either.' (Staff, participating museum/gallery)

We understand that PHF/central programme team commissioned a communications agency to develop an overarching narrative for the programme, including running a workshop with participants, but this did not result in a new narrative that Lead Contacts and Steering Group members felt was sufficiently compelling to use. Nevertheless, our feeling is that if PHF were to run a similar programme in future, it might still be worth exploring if some external assistance might be helpful in clarifying key terms and developing a narrative that helps communicate subtle and complex programme aims. In carrying on this work in their own organisations, participating galleries and museums might want to think a bit more about how they talk about this agenda with their colleagues and partners in future.

Closing comments

We have been really struck by the huge commitment of everyone involved in *Our Museum* to the programme's mission to properly embed excellent participatory practice so that it is sustained for the long-term. It seems to us that the experience of taking part in the programme has been very challenging at times, but this is hardly surprising given the demanding nature of the task, and the difficult context in which the programme has been operating.

There has been much about the programme arrangements that has worked well and has contributed to programme objectives. In particular, it seems that participating museums and galleries have benefitted from sage advice from a skilled central team, insightful challenge from experienced evaluators/Critical Friends, encouragement and support from respected peers, and exposure to some novel and inspiring ideas and practice. Some museums and galleries also received additional financial and other support (on top of the standard *Our Museum* funding and support offer) to address wider organisational challenges that might have jeopardised their participation in the programme. This also seems to have been very valuable, and much appreciated.

As we said at the start of this report, *Our Museum* was designed to encourage experimentation and learning, and programme arrangements should be approached in the same spirit. In carrying out this review, we have found plenty of evidence of learning and improvement in ways of working during the course of the programme. Notable examples include the instigation of lead contact meetings, the development of a more collaborative approach to the design and facilitation of peer review in years two and three, and the emphasis on a principle-based approach to change rather than on particular structural models in the latter part of the programme. Overall, everyone we spoke to recognised that ways of working on *Our Museum* became much more collaborative as the programme progressed. As several participants told us, and we have referred to elsewhere, the decision to commission this review is in itself evidence of PHF's commitment to collaborative learning and improvement.

This report sets out programme experience and learning under 10 themes that seem to us to be worth thinking about before embarking on a similar, long-term change programme in future. Under each theme, we found much that worked well about programme arrangements on *Our Museum* that is worth repeating in future. We also make some suggestions about things that might be tackled differently.

Drawing both on what worked well and what might be tackled differently, we suggest the main points that PHF/programme leaders may wish to consider in future include:

1. *Designing the journey with the end in mind*: investing in a collaborative approach to programme design, developing a shared theory of change that articulates how working with a particular cohort will support sector-wide change, and drawing more explicitly on relevant experience and learning from other sectors in designing programme arrangements
2. *Creating the best starting point*: checking participants' appetite and capacity to get involved in a long-term programme, negotiating roles and expectations carefully, engaging leaders within participating organisations at an early stage, and building in a short scoping/testing period at the start of a long-term programme to allow participants to check and consult more widely on their plans to ensure they are still appropriate and feasible
3. *Balancing direction with flexibility*: promoting core change principles rather than particular structural models, and exploring ways to surface and share assumptions about what 'good practice' looks like
4. *Balancing support with challenge*: taking care with feedback and delivering challenging messages in person where possible, building in bespoke organisational support and targeted training from the start, and encouraging participating organisations to involve community partners in designing and delivering training
5. *Creating the right conditions for peer support and learning*: establishing a forum for peer exchange and support from the beginning and using this to co-design other arrangements, helping participants to get to know each other and understand each other's plans as early as possible, and developing some shared principles/protocols for communicating with a network of funded organisations
6. *Modelling what you want to achieve*: trying to ensure ways of working reflect the nature of the task and the spirit of the programme, creating early opportunities for those taking part in any programme to get to know those making judgements about their progress, agreeing some principles to guide ways of working, and encouraging all participants to take responsibility for proactively contributing ideas about how to design and improve programme arrangements and ways of working
7. *Forging a new funder/grantee relationship*: communicating the intention to create a new kind of funder/grantee relationship at the start and throughout the life of a programme, identifying symbolic opportunities to demonstrate that commitment
8. *Harnessing the power of formative evaluation*: building in evaluation from the start, keeping evaluation and support roles separate, and designing evaluation to gather the range/types of evidence required to make the case for this work with different audiences

9. *Deploying skills and expertise in support of programme goals and wider strategic agendas*: supporting the Project Director to navigate and link up with PHF internal decision-making structures, exploring possible team structures for programme leadership, identifying other ways to harness the expertise of Steering Group members, and contracting for additional expertise with care and with programme goals and wider strategic agendas in mind
10. *Creating a shared vocabulary and narrative*: helping participants to understand key concepts, having a strong, overarching narrative that sits above programme outcomes, and exploring possible external support to help participants communicate programme goals and learning in a compelling way.

Drawing both on what worked well and what might be tackled differently, we suggest the main points that participating organisations might wish to consider include:

2. *Creating the best starting point*: thinking really carefully about what they want to get out of any long-term funded programme and the time and effort that might be involved in carrying out the work, liaising with the funder and other participants, consulting widely on and testing plans at bid writing stage and on joining a programme to ensure they are appropriate and feasible, and ensuring leaders and senior managers are on board and actively championing participation
4. *Balancing support with challenge*: ensuring programme Leads are adequately supported and appropriate mechanisms are in place to take forward programme learning and remove barriers to change, and involving community partners in designing and delivering training
6. *Modelling what you want to achieve*: helping to agree some principles to guide ways of working, and taking responsibility for proactively contributing ideas about how to design and improve programme arrangements and ways of working
8. *Harnessing the power of formative evaluation*: embedding self-evaluation to ensure progress is sustained
9. *Deploying skills and expertise in support of programme goals and wider strategic agendas*: recruiting Leads with the appropriate blend of personal qualities and positional authority for the task.

At its heart, *Our Museum* has been about forging new types of partnerships: between museums and galleries and their communities, and between PHF as a funder and the organisations it supports. In our experience, good partnership working is based on a sense of shared endeavour, clarity about roles and expectations, mutual respect and recognition of divergent pressures and interests, and good mechanisms for reviewing progress and working arrangements. We hope that this report has provided some helpful pointers on these issues and will prove helpful in designing future programmes, particularly those involving networks of organisations working together, concerned with organisational development and change, and characterised by an 'engaged funder' relationship with grantees.

Appendix

List of participants

The authors would like to thank the following people for talking to us as part of this review (in both interviews and group discussions):

PHF/central programme team

Dr Piotr Bienkowski – Project Director
Gerri Moriarty – evaluator/'critical friend'
Sally Medlyn – evaluator/'critical friend'
Tracy-Ann Smith – resource producer
Rob Bell – Director, Strategy, PHF
Régis Cochefert, Director, Grants and Programmes, PHF

Steering Group

Kate Brindley – Arnolfini Centre for the Creative Arts, Bristol (Chair of the Steering Group)
Sajida Carr – Creative Black Country
Penny Wilkinson – Northern Rock Foundation
Maurice Davies – Royal Academy of Arts
Anna Southall – former Vice Chair of Big Lottery Fund
Maev Kennedy – journalist and BBC radio presenter
Sharon Heal – Museums Association
Karen Perkins – Luton Culture
Janet Dugdale – National Museums Liverpool

Ryedale Folk Museum

Jennifer Smith, Director, Ryedale Folk Museum

The Museum of East Anglian Life

John Lanagan – Chief Executive Officer, Museum of East Anglian Life
Sarah Allman – formerly Lead Contact/Museum Activist, Museum of East Anglian Life
Elle Root – formerly Coordinator/Programme Assistant, Museum of East Anglian Life

Glasgow Museums and Galleries

Christine McLellan – Lead Contact, Glasgow Museums
Laura Gutierrez – Joint Lead Contact/Project Manager, Glasgow Museums
Isobel MacRae – Community Partner, Sense Scotland

The Lightbox, Woking

Rib Davis – Lead Contact, The Lightbox
Marilyn Scott – Director, The Lightbox
Abi Hall – Learning Officer, The Lightbox
Heather Thomas – Learning Manager, The LightBox
Sandie Bolger – Community Partner, Lakers Youth Centre
George Otto – Community Partner, Woking Arts Society
Cath Stamper – Community Partner, York Road Homeless Project

Hackney Museum

Niti Acharya – Lead Contact/Museum Manager, Hackney Museum
Tanya Harris – formerly Community Partner/Coordinator, Hackney Museum
Tahlia Coombs – Heritage Manager, Hackney Council
Berni Graham – Community Partner, Stoke Newington Common Users Group

Bristol Culture

Jackie Winchester, Lead Contact/Senior Officer, Participation, Bristol Culture
Sue Thurlow – Community Partner, Lloyds Bank
Laura Pye – Head of Culture, Bristol City Council
Karen Garvey – Coordinator/Engagement Officer, Bristol Culture
Philip Walker – Head of Engagement, Bristol Culture
Alex Hardy – Volunteering Coordinator, Bristol Culture

Amgueddfa Cymru-National Museum Wales

Janice Lane – Director of Learning, Exhibitions and Digital, Amgueddfa Cymru-National Museum of Wales
Bethan Lewis – Head of Museum, St Fagans National History Museum, Amgueddfa Cymru-National Museum of Wales
Nia Williams – Lead Contact/Head of Learning Participation and Interpretation, Amgueddfa Cymru-National Museum of Wales
Loveday Williams – Senior Learning, Participation and Interpretation Officer, St Fagans, Amgueddfa Cymru-National Museum of Wales
Stephanie Burge – Our Museum Coordinator, Amgueddfa Cymru-National Museum of Wales
Carys Davies – Administration Officer, Volunteering Department and Historic Buildings Unit, Amgueddfa Cymru-National Museum of Wales
Elaine Cabuts – Museum Secretary, Corporate Planning and Policy, Amgueddfa Cymru-National Museum of Wales
Sybil Williams – Community Partner, Pedal Power
Fiona Liddell – Community Partner, Welsh Council for Voluntary Action
Shelley Haines – Community Partner, Llamau

Belfast Exposed

Ciara Hickey – Curator, Belfast Exposed
Tracey Marshall-Elliot – Executive Director, Belfast Exposed
Mervyn Smyth – Community Engagement Manager, Belfast Exposed
Tom Finlay – Lead Contact/Development Manager, Belfast Exposed
Joanne Fitzpatrick – Community Partner, Head of Art, Hazelwood Integrated College

Tyne and Wear Archives and Museums

Helen White, Lead Contact/Head of Museums (Gateshead, Newcastle and Newcastle University), Tyne & Wear Archives & Museums
Suzanne Prak-Sandilands, Our Museum Coordinator, Tyne & Wear Archives & Museums