

Strategic Evaluation of the Museum Futures Programme

Inception Report for Museums Galleries Scotland



Social Research



Service Design & Innovation



Strategy & Collaboration



Evaluation Support



Social Impact Measurement

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1. Introduction

1.1 Purpose

Museum Futures is a national intervention designed to strengthen the resilience, sustainability and long-term viability of Scotland's museums. It responds to well-documented structural pressures in the sector, including financial fragility, uneven organisational capacity, workforce constraints and challenges in maintaining core functions.

The programme aims to help organisations move from short-term firefighting toward strategic planning and proactive development. The model combines a consistent diagnostic entry point with a flexible package of capacity support, skills development, and targeted investment. Organisations follow different routes depending on their needs and readiness, but all begin with a structured process for building understanding of their current position.

This Inception Report sets out more detail on the proposed approach to the first phase of the Museum Futures evaluation. It summarises the work completed since contract initiation, including the beginnings of a shared Theory of Change, review of the evaluation questions, proposed early indicators, and more detail on data requirements and analytical priorities.

The report also presents a detailed plan for Phase 1, outlining the research, analysis and early synthesis to be completed by December 2025. It confirms what has been agreed, revised or finalised during inception, and provides a basis for the evaluation activity that follows.

1.2 Shared Understanding

Through inception discussions and the Theory of Change workshop, a shared understanding has been established of the Museum Futures programme's aims, delivery model and intended contribution to the sector (and society).

Partners agree that the evaluation should support ongoing learning, inform programme refinement and provide credible evidence to guide future investment and policy decisions. The primary users of findings will be MGS, Scottish Government and Heritage Fund, with outputs also supporting museums and wider stakeholders in both sector and communities.

Minor refinements have been made to the scope and sequencing of early evaluation activity, and this process will continue during Phase 1 in a way that reflects the programme's test-and-learn design.

2. Strategic Theory of Change

A Theory of Change workshop was held on 7 November 2025 at the Museums Galleries Scotland offices. The session was facilitated by Social Value Lab and attended by representatives from Museums Galleries Scotland, the Scottish Government, the National Lottery Heritage Fund, and two MGS Board members who also lead museums, providing a broader sector perspective. The purpose was to build a shared understanding of how the Museum Futures programme is expected to generate change and to establish the foundations for the evaluation.

- **Welcome and purpose of the session.** Establishing shared intent for the workshop and its role in shaping the evaluation.
- **Expectations and ambitions for the Museum Futures programme.** Exploration of what partners want the programme to achieve, and what success would look like.
- **Expectations and ambitions for the evaluation.** Discussion on how evidence should support learning, adaptation and decision-making.
- **Long-term outcomes.** Agreement on what success should look like beyond the life of the programme, and the wider policy contributions.
- **Beneficiaries and stakeholders.** Mapping direct and indirect stakeholders and discussing their needs and perspectives.
- **Challenges faced by each stakeholder group.** Identify key issues that the programme is intended to address.
- **Outcomes mapping.** Development of outcome pathways for each stakeholder group, including short to medium-term outcomes (first 12–18 months) and early signs of success (first 3–6 months)
- **Session reflections.** Identification of risks, what could hinder progress, and what partners can contribute to ensure smooth evaluation.
- **Next steps.** Agreement on follow-up actions and further ToC development with MGS staff.

The workshop produced a set of long-term outcomes and a first draft of outcome pathways for museums, programme partners, communities and wider system actors. It also generated early insights into programme assumptions, risks and stakeholder needs. These outputs have been analysed and presented below, following the established process for developing Theory of Change models.

2.1 Shared Expectations and Ambitions for the Programme

Across MGS (staff), MGS Board representatives, Scottish Government and Heritage Fund, the following shared expectations were consistently articulated:

Long-term financial sustainability. There is a common expectation that the programme should help museums shift from short-term crisis response to stronger financial footing, supported through long-term planning, increased income generation, and more strategic investment.

Stronger collaboration and sector cohesion. All partners emphasised the need for more effective collaboration across the museum sector and with external stakeholders. This includes lasting partnerships, improved communication, and more coherent sector-wide learning.

Innovation and testing new approaches. There is a shared ambition for the programme to support innovation, experimentation, and the development of new delivery models. Flexibility and adaptability were repeatedly referenced.

Leadership capacity and skills development. Across groups, there was agreement on the importance of freeing leadership time, developing strategic skills, and addressing organisational capacity constraints. Building confidence and competence was seen as a central contribution of the programme.

Holistic organisational development. Participants expressed a preference for an integrated approach to development: addressing governance, internal processes, culture, strategic planning, and operations. The programme is expected to help museums tackle long-standing issues.

Recognition of sector diversity and place-based relevance. All groups noted the wide diversity of museums with each organisation at a different stage in their journey. Many talked about the need for support that reflects different sizes, governance models, capacities, and geographical contexts with place-based working consistently highlighted.

Increasing optimism and confidence. There was a shared desire to rebuild sector morale, support positive momentum, and create space for constructive, future-facing thinking.

Strengthening community relevance and access. Participants expected the programme to reinforce museums' roles within local communities, support audience engagement, and safeguard access where feasible. This is unlikely to be seen in the short term but might form a longer-term aspiration.

The table below summarises some of the differences in emphasis expressed by each partner group.

Theme	MGS Staff	MGS Board / Sector Representatives	Scottish Government	Heritage Fund
Strategic shift from crisis to long-term sustainability	Focus on reducing reactive behaviour within the sector and building strong foundations.	Emphasis on deep-rooted challenges and the need for realistic expectations.	Concern about repeated crisis-funding requests; interest in preventative approaches.	Interest in resilience over crisis-driven funding.
Collaboration and sector ecology	Strong emphasis on improving sector-wide relationships and removing structural blockages.	Focus on the practical realities of partnerships, local ecosystems, and achieving relevance in place.	Interest in partnership models aligning with public service reform.	Emphasis on improved alignment across funders and coherent strategy.
Innovation and experimentation	Expectation that the programme enables flexible, responsive testing of new approaches.	Interest in innovation linked to organisational culture, empowerment, and reducing gatekeeping.	Emphasis on testing place-based models and different ways of organising public services.	Interest in transferable learning for wider Heritage Fund programmes.
Capacity and leadership development	Strong focus on leadership capacity, skill development and organisational headspace.	Emphasis on the lack of time in operational roles and need for culture change in leadership and governance.	Interest in understanding leadership needs more broadly across the cultural sector.	Requires better evidence on organisational sustainability needs.
Sector diversity and community relevance	Recognition of varied museum needs and contexts.	Strong emphasis on community relevance, local ecosystems, and lived operational realities.	Focus on geographical spread and diverse needs across Scotland.	Interest in understanding needs to inform portfolio strategy.
Optimism and morale	Desire to build sector confidence and momentum.	Strong emphasis on morale, empowerment, and “unleashing” sector potential.	Interest in positive narrative linked to transformation.	Interest in evidence of positive sector trajectory.

This combined view shows a high degree of alignment across partner groups while highlighting specific concerns:

- MGS staff lean towards operational feasibility, sector ecology, and practical support.
- MGS Board representatives provide grounded sector insight, emphasising culture, morale, lived operational constraints, and community relevance.
- Scottish Government prioritises alignment with wider public service reform, preventative approaches, and evidence for strategic investment.
- Heritage Fund focuses on robust evidence of need, alignment with funding priorities, and learning relevant to organisational sustainability.

Together, these perspectives form a coherent set of expectations that the programme should enable sustainable change, strengthen capacity, test new models, and support more confident, connected museum organisations across Scotland.

2.2 Requirements and Ambitions for the Evaluation

Discussion across all partner groups showed a high degree of alignment regarding what the evaluation must deliver. Differences were present but modest, reflecting variations in organisational role rather than divergent priorities. The dominant position in the room was that the evaluation should be practical, evidence-driven, and capable of supporting both real-time programme adaptation and future investment decisions.

Evidence of effectiveness across diverse contexts. All partners emphasised the need to understand which approaches, models, and delivery mechanisms are working, for whom, and under what conditions. Evidence of both effective and ineffective practice was consistently highlighted as necessary.

Support for continuous learning and refinement. The evaluation is expected to contribute to the programme's iterative design. Partners stressed the importance of regular feedback loops, enabling adjustments to support, funding mechanisms and delivery processes as the programme progresses.

Clarity, usability and proportionality. There was clear and repeated emphasis on developing evaluation tools and reporting structures that are simple to operate, easy to interpret, and do not place excessive burden on museums or the MGS team. Practicality and accessibility were key concerns.

Evidence to inform future funding and strategic decisions. The evaluation must provide credible evidence that can support cases for continued or multi-year investment, while also demonstrating emerging progress. This applies to internal programme decisions and external advocacy.

Assessment of multiple models and approaches. The programme includes diverse interventions and test-and-trial elements. Partners expect the evaluation to examine different models, assess their potential for replication, and support decision-making about which approaches to scale or discontinue.

Relevance and utility for the museum sector. Findings must support museums in understanding how to adapt their practice, strengthen organisational capability, and learn from peers. The evaluation should generate insights of practical value to organisations.

Contribution to a clear programme narrative. Across partner groups, there was a desire for the evaluation to support a credible, grounded narrative about the programme's progress. This narrative should be evidence-based, realistic about challenges, and capable of motivating engagement.

While consensus dominated, some variation in emphasis appeared, reflecting each group's position within the sector:

MGS staff

- Prioritised real-time learning to refine delivery and understand sector needs.
- Emphasised proportionate tools that support rather than burden the programme.

MGS Board / sector representatives

- Focused on credibility, realism, and practical relevance to museum operations.
- Highlighted the importance of understanding organisational culture, leadership behaviours, and workforce pressures.

Scottish Government

- Emphasised the need for evidence capable of informing wider public service reform, place-based approaches, and long-term investment decisions.
- Sought clarity on what works in different geographic and policy contexts.

Heritage Fund

- Prioritised current, compelling evidence of need in the sector.
- Interested in learning that can inform organisational sustainability funding across their wider portfolio.

In contrast to more varied expectations for the programme, partners demonstrated strong convergence regarding the evaluation's purpose and requirements. The evaluation must be:

- adaptive,
- proportionate,
- strategically useful, and
- capable of generating a credible narrative of progress.

2.3 (Early) Typology of Programme Activities and Support

The Museum Futures Programme provides three main types of support. These categories capture the core elements consistently evidenced to date and will be refined as further documentation is reviewed.

Category	Description	Examples of Key Activities
1. Diagnostic and Planning Tools	Tools designed to help museums understand their organisational position, identify priorities, and determine the most appropriate route through the programme.	<ul style="list-style-type: none"> • Completion of the Organisational Health Checker (OHC). • Use of companion guidance to interpret results. • Internal planning discussions informed by diagnostic outputs.
2. Funding and Investment Mechanisms	Financial support enabling organisations to build capacity, trial new approaches, or implement strategic and operational changes.	<ul style="list-style-type: none"> • Leadership Capacity Funding to release senior staff for strategic work or create temporary roles. • Open Fund grants linked to needs identified through the OHC (e.g. governance, income generation, digital infrastructure). • Collaborative / strategic pilots, including shared services, shared storage or centres of expertise. • Innovation and test-and-learn activity allowing low-risk trials. • Unlocking Potential grants
3. Wraparound Support and Sector Development	Non-financial support that strengthens skills, builds networks and enables shared learning across the sector.	<ul style="list-style-type: none"> • Access to specialist training providers (ACE, AMA, SCVO, etc.). • Mentoring and expert advice (e.g. HR, fundraising, governance). • Peer learning, action learning sets and cohort work. • MGS-led brokering of partnerships and connections. • Facilitation of place-based collaboration.

This typology reflects the activities most clearly defined at this stage. It will be expanded as further programme documents and early monitoring data are reviewed. Additional elements (e.g. governance development, environmental sustainability, workforce support) will be added if confirmed in later documentation.

An important early consideration for the evaluation is that different types of activity are expected to generate different forms and pathways of impact. The programme combines diagnostic tools, financial investment and wraparound support, and the potential effects of these will vary significantly, for example:

- Diagnostic tools are likely to influence early prioritisation, decision-making and organisational self-awareness.

- Leadership capacity and funding mechanisms are expected to affect strategic planning and organisational change, with potential variations by size, governance model and local context.
- Collaborative pilots and shared-service models may generate sector-level or regional effects rather than organisation-specific outcomes.
- Training, mentoring and peer learning may produce incremental changes in skills, confidence and behaviours, with effects that accumulate over time.
- Innovation and test-and-trial activity may lead to small-scale or experimental outcomes initially, with longer-term implications depending on feasibility and replication.

2.4. Stakeholders and Beneficiaries

Primary stakeholders and beneficiaries

Museums and galleries - whether directly funded through the programme or engaging only through diagnostic tools and sector-wide support—are the programme’s core beneficiaries. They represent a diverse sector comprising independent museums, local authority services, volunteer-led organisations, and national institutions operating across rural, island and urban contexts. These organisations are expected to participate in the Organisational Health Checker, apply for leadership capacity funding or open grants, undertake training or mentoring, and contribute to collaborative or test-and-trial activity. The programme aims to help them gain strategic clarity, strengthen organisational resilience, address skills and governance gaps, and improve their ability to plan for financial sustainability. Improved collaboration, increased confidence, greater relevance within their communities, and a shift from reactive to proactive working are expected outcomes for this group.

The three programme partners all have direct roles in shaping, funding and overseeing Museum Futures, and each stands to benefit from the programme’s learning. Collectively, they seek a clearer understanding of sector needs, better evidence on what works, and stronger alignment between funding interventions and long-term sustainability. **MGS** is focused on refining its support model, strengthening sector relationships and improving the coherence of the wider museum ecology. The **Scottish Government** is looking for evidence that informs cultural policy, supports preventative and place-based approaches, and reduces reliance on repeated crisis funding. **The Heritage Fund** seeks robust, current evidence of need and practical learning that can inform its wider sustainability and resilience funding portfolio. Together, these partners rely on the programme to test new models, improve strategic alignment and strengthen the overall effectiveness of sector investment.

Secondary stakeholders

These stakeholders are not the primary focus of programme delivery but play a significant role in the wider ecosystem within which museums operate and will be a complementary source of evidence for the evaluation:

- Local authorities responsible for governance, staffing and local funding environments.
- Other funders and support agencies, including skills and training providers (ACE, AMA, SCVO, Social Enterprise Academy).
- Wider culture and heritage organisations with related development interests.
- Communities, including residents, civic groups and local audience segments.

- SMEs and freelancers providing training, technical support and professional services to museums.
- Local businesses and place-based organisations connected to tourism, economic development or community services.
- Regional and informal networks, including museum forums and local convening bodies.
- Education providers, including schools, colleges, universities and DYW partnerships.
- Third sector organisations active in community development, wellbeing or heritage.
- Environmental organisations and green funders with interests in sustainability.
- Elected members and other decision-makers determining local and national cultural investment.

2.5. Long-Term Goals and Themes

The long-term ambitions expressed during the workshop can be grouped into four interconnected themes. These themes capture the vision for a more sustainable, confident and strategically aligned museum sector.

Museums develop new ways of working and increase organisational resilience.

Longer-term begins with improved diagnosis of priorities and corresponding improvements in organisational capability. The programme aims to support museums in developing stronger governance, clearer strategic planning, more inclusive decision-making and greater flexibility in responding to change. Over time, museums are expected to adopt more evidence-informed approaches, address persistent skills gaps and create the conditions for sustained organisational resilience. These internal improvements form the foundation for subsequent outward-facing change.

Museums are more connected and relevant to their communities

With strengthened internal capability, museums are expected to engage more confidently and effectively with their local communities. This includes deeper partnerships with local organisations and services, improved audience engagement and more visible contributions to community wellbeing and local economic activity. Increased capacity and strategic clarity should support museums in understanding their place within local systems and in responding more effectively to local needs.

The value of museums is better communicated and more widely appreciated

Improved community relevance is expected to strengthen public and stakeholder perceptions of the sector. Museums will be more confident in talking about their value and recognised more widely as accessible, essential cultural and civic assets rather than as vulnerable institutions. Increased visibility of their contributions to cultural, social and economic outcomes is anticipated to reinforce this shift and support a more positive narrative around the sector's role.

A more coherent framework for learning, collaboration and support

As organisational capability strengthens and public value becomes clearer, partners anticipate a more coherent and confident sector overall. Long-term expectations include improved morale and workforce stability, reduced reliance on crisis responses, and a support infrastructure that is better

aligned across funders and policy bodies. A more coordinated system—underpinned by stronger evidence, better collaboration and shared learning—is seen as the culmination of the programme’s long-term impact.

2.6: Short- and Medium-Term Outcomes

During the Theory of Change workshop, participants were asked to articulate the changes they would expect to see in the early and intermediate stages of the programme. The exercise focused on identifying:

- Short- and medium-term outcomes for each group of stakeholders
- Early signs of progress or success

The table below organises the short- and medium-term outcomes identified during the Theory of Change workshop. Short-term outcomes represent changes in understanding, confidence, skills or emerging collaboration. Medium-term outcomes reflect more embedded changes in practice, governance, partnership working and strategic alignment.

Stakeholder Group	Short-Term Outcomes	Medium-Term Outcomes
Museums and Galleries	Improved understanding of organisational position, strengths and weaknesses	More confident and evidence-informed strategic planning
	Clearer articulation and evidence of development needs and priorities	Ability to address skills and governance gaps through training, recruitment or structural change
	Early confidence among leaders and initial application of learning	Adoption of more inclusive, agile and effective governance and leadership practices
	Increased awareness of skills, governance and workforce issues	Stronger internal systems and increased capacity to plan beyond immediate pressures
	Early willingness to collaborate and participate in peer learning	Stronger, more consistent partnerships and collaborative working arrangements
	Initial trialling or testing of new approaches	Sustained experimentation, adaptation and implementation of new models
	Early identification of operational or financial risks	Initial improvements in operational or financial sustainability
Programme Partners (MGS, SG, Heritage Fund)	Early intelligence on sector needs and conditions	Better-targeted and more coherent support mechanisms
	Emerging shared understanding of programme purpose and direction	Stronger alignment of funding priorities and decision-making
	Early reflection on patterns, gaps and opportunities across the sector	Clearer articulation of system-level needs and priorities
	Initial recognition of where support mechanisms may need refinement	Adaptation of systems, criteria and processes based on evidence
	Early coordination and communication between partners	More consistent cross-funder collaboration and shared analysis
	Greater understanding around need for evidence-based advocacy	Greater advocacy capacity supported by credible, shared evidence

Stakeholder Group	Short-Term Outcomes	Medium-Term Outcomes
Communities and the Public¹		Improved engagement and participation
		More locally relevant and responsive programming
		Clearer visibility of museums' contribution to local ecosystems
		Improved accessibility and inclusion
		Emerging placemaking activity between museums and local partners
Secondary Stakeholders		Stronger partnerships and more consistent engagement with museums
		Participation in collaborative pilots, shared services or joint initiatives
		Better alignment of external activity with programme learning
		Greater shared learning and coordinated planning

¹ Communities and secondary stakeholders are not generally direct participants in the programme but are likely to experience knock-on impacts from programme activities, i.e. indirect or medium-term outcomes.

3. Implications for the Evaluation Framework

3.1 Indicators and Data Sources by Evaluation Question (EQ)

The following indicators represent initial signs of progress or success, early observable signals that the conditions for short- and medium-term outcomes (described in Section 2) are beginning to form.

These indicators will be refined and developed further during the early stages of fieldwork, in collaboration with MGS and programme partners.

EQ1 – Organisational resilience, effectiveness and long-term sustainability

Initial signs of progress

- Museums articulate organisational priorities more clearly after engaging with the OHC.
- Leaders report early confidence or motivation to apply new learning.
- Museums actively seek support for identified skills, governance or operational gaps.
- Early adjustments appear in planning routines, internal processes or governance discussions.

Likely data sources

- Organisational Health Checker outputs and development plans.
- Feedback from leadership development or governance support activities.
- Early interviews or pulse checks with a sample of museums.
- MGS relationship management notes.

EQ2 – Contribution to communities, places and local systems

Initial signs of progress

- Museums initiate exploratory discussions with local organisations or community groups.
- Staff express clearer intentions around community relevance or place-based working.
- Early, small-scale adjustments are made to improve accessibility or local engagement.

Likely data sources

- Funding applications and development plans referencing community needs.
- Early qualitative interviews with museum staff.
- Notes from peer learning groups or place-based support sessions.
- MGS monitoring and relationship notes.

EQ3 – Leadership capability, skills and capacity across the sector

Initial signs of progress

- Leaders describe improved clarity, confidence, or motivation to take strategic action.
- Uptake of leadership development opportunities increases.

- Managers begin delegating tasks or experimenting with new practices.
- Museums request leadership capacity support to free time for strategic work.

Likely data sources

- Training and leadership development feedback.
- Early interviews focusing on leadership behaviours and confidence.
- Applications for leadership capacity funding.
- Peer leadership group notes.

EQ4 – Innovation, new models of practice, and test-and-trial activity

Initial signs of progress

- Museums identify areas where experimentation or trial activity is needed.
- Early testing of small-scale ideas or pilot approaches appears.
- Staff report increased motivation to explore new ways of working.
- Partners note themes relating to innovation emerging across multiple organisations.

Likely data sources

- Early-stage project documentation.
- Museum feedback on test-and-trial activities.
- MGS notes on innovation funding or idea development.
- Interviews or pulse checks with museums engaged in early trial activity.

EQ5 – Collaboration, coordination and coherence across the sector

Initial signs of progress

- Museums initiate early collaborative conversations or share practice informally.
- Programme partners begin sharing analysis and aligning expectations.
- External stakeholders (e.g. local authorities, networks) note clearer communication from museums.
- Early cross-organisation problem-solving or joint exploration of opportunities emerges.

Likely data sources

- Peer learning and network session notes.
- Steering Group minutes and partner meetings.
- Early interviews with museums and stakeholders.
- Evidence from MGS coordination and brokerage activities.

EQ6 – Emerging learning about what works, for whom, and in what contexts

Initial signs of progress

- Partners identify emerging themes or patterns from OHC data and early engagement.
- Museums report early reflections about what support or approaches feel most useful.

- MGS notes recurring issues, gaps or opportunities across different organisations.
- Ideas for adaptation or refinement begin to surface among partners or practitioners.

Likely data sources

- OHC aggregation and thematic analysis.
- Museum reflections collected through interviews or short feedback tools.
- Programme partner analytical discussions.
- Early case examples or vignettes shared informally.

EQ7 – Implications for future funding, policy and support infrastructure

Initial signs of progress

- Programme partners begin discussing evidence needs for future strategic decisions.
- Early alignment appears in partners' thinking about the future of support.
- Museums express clearer expectations of what effective support looks like.
- Partners begin noting areas where funding mechanisms may need refinement.

Likely data sources

- Strategic partner discussions and minutes.
- Notes from the Steering Group or funder coordination meetings.
- Interviews with senior MGS staff and partners.
- Emerging findings from museum needs analysis.

Potential refinements

While the Evaluation Questions are heavily focussed on impact, the Theory of Change workshop highlighted significant variation in the sector and the need to understand whether the programme is functioning effectively for everyone. It may therefore be worth broadening EQ6 to include greater consideration of the programme's mechanisms and whether the delivery model is meeting the needs of all target organisations.

3.2 Implications for Phase 1

Early progress is likely to be modest and mainly qualitative, centred on shifts in understanding, confidence and engagement rather than measurable organisational or community change. This places particular importance on the Organisational Health Checker as the strongest available baseline for assessing need and early movement. Community and system-level changes will take longer to emerge, so indicators in these areas should focus on early intent or exploratory activity rather than outcomes. Evidence will reflect contribution rather than attribution, given the wider funding and operational environment. Finally, indicators must remain proportionate and use low-burden tools built around existing programme interactions.

Indicators will be refined as early evidence is gathered and through further discussion with MGS. This will include mapping indicators to appropriate data sources, identifying those most useful for adaptive decision-making, and ensuring that data collection remains manageable for museums and

partners. The indicator framework will be kept practical and focused on supporting ongoing learning and programme refinement.

3.3 Assumptions, Risks and Considerations

Underlying assumptions

The evaluation design rests on several assumptions emerging from the workshop discussions. It is assumed that museums will have sufficient capacity to engage with core programme components such as the Organisational Health Checker, leadership development and peer learning; this reflects widespread recognition of the operational pressures facing many organisations. It is also assumed that programme partners will maintain a broadly aligned understanding of programme purpose and will continue to work collaboratively to interpret early evidence, given the emphasis participants placed on coherence across funders. Another assumption is that the Organisational Health Checker will provide reliable baseline insight into organisational need and readiness, which participants highlighted as a central diagnostic tool. Finally, the evaluation assumes that the programme's test-and-trial approach will generate regular opportunities to observe emerging changes and adjust data collection accordingly.

Key risks

Workshop participants identified several risks that may influence the evaluation. The most prominent is limited capacity within museums, particularly where staff are stretched across leadership, operational and front-facing duties; this may restrict their ability to participate in evaluation activities or implement change at pace. There is also a risk that early data may be uneven if organisations require more time than expected to use diagnostic tools or engage fully with support. External pressures—including funding instability, local authority constraints and wider policy uncertainty—were noted as factors that may shape organisational behaviour in ways that complicate the interpretation of programme effects. Participants also stressed that significant outcomes should not be expected too early, creating a risk of unrealistic expectations for rapid change. Finally, the evaluation is exposed to risks associated with cross-funder alignment; if coherence across MGS, Scottish Government and Heritage Fund weakens, evidence may fragment and learning may be harder to consolidate.

Methodological considerations

The evaluation will need to balance the need for credible evidence with the requirement to avoid imposing additional burden on museums already working with limited capacity. Early evidence is likely to be predominantly qualitative, reflecting shifts in understanding, confidence and early adjustments in practice rather than clear organisational change. Timing is critical: participants emphasised that governance improvements, strategic planning and collaborative models will take time to develop, indicating that medium-term outcomes cannot be assessed prematurely. Variation across the sector—by size, governance model, geography and resource base—must also be reflected in sampling and analysis, as participants highlighted the diversity of organisational starting points. Given the influence of external pressures, contribution analysis is the most appropriate approach for interpreting results, rather than attempting direct attribution.

Implications for evaluation planning

These factors underline the need for a flexible evaluation approach that can respond to emerging insights and adjust timing as required. Early data collection should focus on low-burden feedback mechanisms aligned to existing programme interactions, ensuring that signs of early movement are captured without adding strain to participating museums. Deeper evidence on medium-term outcomes should be scheduled later in the programme, once organisations have had adequate time to apply learning and act on diagnostic findings. Continued coordination between programme partners will be essential to support shared interpretation of evidence and maintain coherence across the funding and support system. Overall, the evaluation must remain adaptive, proportionate and closely linked to the programme's Theory of Change, ensuring that emerging findings are both credible and usable for decision-makers.

4. Phase 1 Work Plan (Oct–Dec 2025)

Phase 1 will focus on establishing a robust analytical foundation for the evaluation as well as some initial insights. Activity will be structured around the tasks specified in the proposal: (i) finalising the Theory of Change, (ii) reviewing existing programme data and documentation, (iii) undertaking early consultations and scoping work, and (iv) producing initial analytical outputs to support adaptive learning.

4.1 Finalising the Theory of Change

The development and refinement of a shared Theory of Change is a core task for Phase 1. Work will involve:

- integrating insights from the workshop into a consolidated ToC model;
- validating pathways and assumptions with MGS and programme partners;
- mapping short- and medium-term outcomes clearly to the long-term aims;
- agreeing the early signs (indicators) of progress and success
- confirming areas where further evidence is needed to support the ToC.

This process will also help to identify priorities for early fieldwork and clarify evaluation focus.

4.2 Review of Existing Programme Data and Documentation

Phase 1 will involve a comprehensive review of programme materials. Working with MGS, the evaluation team will:

- review documents already shared, including funding guidance, diagnostic tools, wrap-around support materials and monitoring spreadsheets;
- review Organisational Health Checker (OHC) outputs and museum development plans to establish a clear baseline;
- identify documents referenced during workshop discussions but not yet provided;
- confirm whether additional documentation exists on leadership development, pilot governance, training content, or programme monitoring;
- develop a structured document inventory noting availability, gaps and priorities for follow-up.

This review will determine what existing data can be used directly and where further evidence will be required.

4.3 Early Scoping Interviews and Consultation Planning

Targeted early consultations with key groups should also begin in phase 1. Rather than conducting the full programme of interviews in this phase, the focus will be on establishing a prioritised and representative 'longlist' of consultees. Working with MGS, the evaluation team will:

- identify stakeholders not represented in the ToC workshop (e.g. local authorities, volunteer-run museums, regional networks, education bodies);

- map organisational engagement using MGS's master spreadsheet to identify museums at different stages of participation;
- agree criteria for prioritising consultees for early scoping interviews;
- plan the first wave of interviews with programme partners to understand expectations, early learning and strategic priorities.

The output from this work will be an engagement plan designed to ensure that subsequent fieldwork meets the needs of the evaluation.

4.4 Development of Early Feedback and Data Collection Tools

During Phase 1 we will also explore mechanisms for capturing early evidence and feedback. Activity will include:

- designing short tools to capture initial signs of progress (e.g. pulse checks, topic guides and prompts for interviews);
- ensuring these tools align with programme touchpoints and do not add burden to museums;
- mapping where existing monitoring systems can be used to support the evaluation;

This will create a practical infrastructure for analysing early evidence.

4.5 Analysis and Early Insights

MGS and partners require early analytical outputs in support of programme learning and development. Phase 1 will therefore involve:

- synthesising early OHC patterns to identify emerging themes in organisational need and readiness;
- producing an insight note for the December Steering Group summarising early signs of progress, partner alignment, and any emerging risks;
- identifying areas where refinement of programme delivery or support may be helpful;
- confirming the analytical priorities for 2026.

This initial synthesis will ensure that the evaluation contributes to adaptive decision-making.

4.6 Next Steps

The following actions will be taken following approval of this Inception Report:

- finalise Theory of Change;
- confirm documentation inventory with MGS and request outstanding items, analyse early programme data;
- schedule initial interviews with programme partners;
- prepare the December 2025 early insight report;
- prepare evaluation plan and timeline for 2026, including updated list of Evaluation Questions, sampling, methods and reporting points
- develop feedback tools (e.g. Pulse survey) and agree communication with museums

- develop consultation and advocacy plan;

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