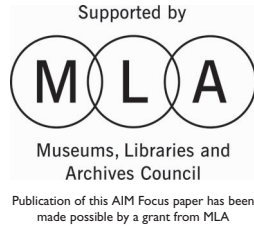


RENAISSANCE museums for changing lives



AIM FOCUS PAPERS



Setting Up a New Museum

Kate Hebditch

Every decade someone writes that the golden age of new museum developments is over; and every decade superb new museums, extensions and galleries spring into being.

However, every decade also sees the closure of a surprising number of museums. Planning in the early stages can help a museum ensure it is the permanent institution the public expects it to be, rather than a casualty of circumstance.

This Focus paper is designed to help small, mostly volunteer-run, museums in their first steps. It is not intended to be a vast tome covering every aspect of running a museum, nor a plan for existing museums to set up new premises or branches. The best advice for anyone setting up a museum is to visit other museums and to meet other people working in the same field.

Is our journey really necessary?

The commonest reasons for setting up a museum are:

- To preserve a collection, sometimes a specialist collection amassed by an individual;
- To preserve a building or other heritage asset;
- To celebrate the identity of a growing more confident community, such as a small town, an ethnic group etc, or the life of an exceptional person;
- To formalise an *ad hoc* collection that is part of a larger organisation such as a university or professional institution.

Before you proceed further it is worth considering whether you might carry out your objectives better in other ways.

If you have a collection, would it be better deposited in an already existing museum or collection, preferably one accredited with the Museums, Libraries and Archives Council

(MLA)? The Museums Association (MA) publishes a Museums and Galleries Yearbook which lists most museums and galleries in Britain and gives a brief summary of their collections. For specialist collections it may be worth contacting a Subject Specialist Network (SSN), which are listed on the Collections Link website (www.collectionslink.org.uk).

If you have a building you are trying to preserve by converting it into a museum, will it make a good museum? How much will it cost to convert and run? Is it accessible? Are there existing museum services that could be transferred to it? Are there any better uses for the building? Talk to architects and the local planning authorities to get their views.

If you are a growing community group which wants to celebrate its identity, are there any other museums you could work with? Would a series of exhibitions and events in an existing institution such as a local library be a more sustainable way of carrying out your plans? Talk to other museums and libraries in the area.

You could also consider setting up a virtual museum rather than a physical one. See the community museums page on the museum service section of South Somerset district council's website for examples (www.southsomerset.gov.uk).

The current funding climate

In many ways museums have never had it so good as they have over the last 15 years. Lottery funding has provided nearly £4 billion investment in heritage – including museums – and the 'Renaissance' scheme in England has resulted in £150 million for the larger non-national 'Hub' museums, a part of which has been devolved down to the smaller regional museums.

However, the Lottery has experienced falling revenues and there is a heavy call on funds

distributed by heritage and arts charities. Local authorities are now extremely unlikely to give anything other than small grants. So financial planning is vital for both set-up and operating costs.

Who can help?

If the best way forward for your group is to set up a museum, then who can help you set it up and give advice and support in its running?

The Museums Development Officer network

Most areas in Britain now have a Museum Development Officer (MDO) assigned to them, funded by local authorities, Hub museums or the MLA partnership (this latter will come to an end in 2008).

Much of the work of MDOs is with the smaller museums, mostly in the voluntary sector. Your local MDO can give advice on curatorial issues and collections care, funding, training and where to go for specialist advice. They can also help broker partnerships and networks with other museums and organisations to arrange joint marketing, exhibitions and so on. Contact them in the early stages of your project for help and support.

Regional bodies

In recent decades each English region has had a regional body to support and give grant aid to the museums' sector – first Area Museum Councils and later the MLA Partnership. The Government is currently (2008) reviewing these bodies and the other regional cultural agencies, and there is likely to be considerable change in the way their functions are carried out in the future. Museum, library and archive bodies in Wales and Scotland are part of the devolved governments. CyMAL is the Welsh body and Museums Galleries Scotland is the Scottish one.

Hub museums

In England there are 'Hub' museums, which have extra government funding via the Renaissance scheme. Hub museums employ specialists and provide services that can be used by other museums in their area. Contact your local Hub museum to find out how they can help. You can find them via the MLA website (www.mla.gov.uk).

Museum groups

As well as AIM, (Association of Independent Museums), there is also the Museums Association and a number of specialist groups. There may also be a regional Federation and a county museums group in your area. The British Association of Friends of Museums is useful for voluntary sector museums.

Collections Link

There is a huge amount of useful information on all aspects of museums on the Collections Link website (www.collectionslink.org.uk). They also operate a telephone and email advisory service and provide listings of events and training opportunities.

Lottery advisers

Keep a look out for advice surgeries run by the Heritage Lottery Fund (HLF), the Arts Council and other Lottery funders in your area. If you intend to apply to the Lottery, you need to research the requirements at an early stage as it will influence how you do everything from appointing architects and designers to consulting with the public and researching your business plan. Lottery development officers are happy to advise on your proposals and there is much useful information on the HLF website, www.hlf.org.uk.

What sort of organisation do we want to be?

Most independent museums are set up as charitable companies, but some have been formed under other legislation such as that applying to industrial and provident societies or co-operatives.

Status as a limited company will protect members of your governing body from unlimited personal liability (provided they trade lawfully) and create a legal entity for your organisation.

Charitable status gives many practical advantages, as well as legitimising your organisation in the eyes of the public and giving you easier access to certain funds. The principal benefits in England are:

- 80% statutory rate relief on your premises – and the possibility of 100% if your local authority agrees;
- Recovery of tax on Gift Aid donations to your museum by individuals.

However, if part of your income generation comes from operating a shop you need to be clear as to what are charitable trades (e.g.

selling books about your collections) and what are fund-raising (e.g. selling souvenirs and toys). Professional advice is needed.

A new form of structure – the community interest company – came into being in 2005. A Community Interest Company (CIC) is a limited liability company with the specific aim of providing benefit to a community. This legal form can be adopted by a range of social enterprises and 'not-for-profit' projects serving communities throughout the UK, which combine the pursuit of a social purpose with commercial activities. It avoids the need for a separate trading company. However, CICs do not have the tax status of charities, which may be a disadvantage.

All three legal forms require the organisation to carry out financial monitoring and control, and annual accounts will need to be filed with Companies House and/or the Charity Commission. A fine is levied by Companies House if this is not done by the required date. Charities with an income of under £500,000 have simpler accounting and reporting requirements; larger ones require fuller audits.

Trustees or directors have responsibilities for setting the aims of the museum, monitoring its performance, overseeing the organisation's finances, ensuring the safety of the staff and public and legality of the organisation's activities. They may also have a fund-raising role. Key responsibilities and relationships are those between the chairman, the treasurer or finance director, and the head of the museum, who is called variously director, curator or chief executive. He/she is the apex of the staff structure – paid or volunteer – and is not necessarily a trustee.

Further information on finance and governance can be obtained from the Charity Commission and Companies House websites, your local Business Link office and the AIM Focus Paper *Governing Independent Museums* by Adrian Babbidge.

What laws do we need to take account of?

A lawyer would no doubt provide a longer list, but these are the laws that particularly affect museums and on which you should take professional advice:

Charity law

Including the responsibilities of trustees and financial control (see above).

Tax law

VAT is complicated, not least because admission charges are exempt from VAT except in some circumstances. You will need to consider whether or not you need to be VAT registered and what effect this will have on your admission charges. The VAT regulations can be interpreted differently in different areas, so take advice from your accountant and local VAT office. If you are VAT registered, all the VAT you collect on income

(admissions, services, catering and retail – but not books) is paid to HMRC (Her Majesty's Revenue & Customs), but you can reclaim any VAT element on expenditure.

If you employ staff then you need to consider national insurance contributions and PAYE. If you set up a subsidiary company for trading (e.g. running the shop) there may be a liability for corporation tax.

Property law

Covering ownership, leases, boundaries and neighbouring properties.

Intellectual property law (copyright)

You may be able to add to the museum's income by charging the public for use of images etc. But beware using other people's intellectual property – particularly in exhibitions and publications. Rights in work you have commissioned will still be in the ownership of the photographer, artist or author unless you have specified otherwise.

Employment law

There is a plethora of legislation covering employment issues, such as equal opportunities, the minimum wage and working time regulations. Take advice from your local Business Link, local authority human resources department or trustees with specific experience of employing people.

Health & Safety legislation

You are responsible for not endangering the lives and health of your staff, including volunteers, and visitors, so you should carry out risk assessments on your building and activities and ensure you have Public and Employers Liability Insurance. Health & safety is mostly commonsense – not the nightmare it is made out to be by some newspapers. Contrary to popular opinion, the Health & Safety Executive has not banned stepladders, conkers or Christmas decorations – see the 'Myth of the Month' section on their website (www.hse.gov.uk) for down-to-earth advice. See also the AIM Focus Paper *Risk Management and Insurance*.

Disability legislation

The Disability Discrimination Act (DDA) 1995 requires service providers (including museums) to change policies, practices and procedures to remove barriers which may make it unreasonably difficult or impossible for a disabled person to use their service and/or to provide auxiliary aids or services to enable disabled people to use their services. Although museums are often in historic buildings that are difficult to adapt, they may be able to provide access in different ways. Contact your MDO or local disability users' group for help with an access audit of your building and services.

Data protection

If you hold a database that includes information about people, for example a membership

or volunteers list with names and addresses, then you need to notify the Office of the Data Protection Commissioner (www.dataprotection.gov.uk). There is a useful factsheet on this subject on the Collections Link website.

International property law, Treasure Trove and the Museums Association's Code of Ethics

There are specific laws governing the sale or transfer of cultural property between nations, and of Treasure Trove, that affect museums. There may be a Finds Liaison Officer in your area who can advise on Treasure Trove. Museums are also encouraged to sign up to the Museums Association's Code of Ethics.

What do we need to do to the building or site?

Nearly all projects require work to a building, often a listed structure, or an open air site. It is of course essential that you check planning requirements and carry out a thorough search of the site, which may identify any restrictive covenants or other matters which you need to take account of.

The Royal Institute of British Architects (RIBA) can provide you with a list of architects in your area. They can also provide lists of architects with specialist knowledge such as converting old buildings or designing new museums and galleries. The Commission for Architecture and the Built Environment (CABE) produces information about how to be a good client when commissioning a building. Take time to produce a thorough brief. The AIM Focus Paper *Using Museum Consultants* is relevant to the appointment of architects and surveyors.

Things to take account of in museum building projects:

Running costs and protecting the environment. If you can build in good insulation and energy efficient systems at the start, it will cut your future running costs, and meet some of your environmental sustainability requirements. Think about staff costs too; if you have two separate buildings or two entrances you will need more staff to supervise them.

Ease of maintenance. Design the building so it can be easily cleaned and light bulbs can be changed by the most elderly of your volunteers rather than an electrician with a scaffold tower.

Access. Allow adequate doorways and space between cases for wheelchairs and buggies. Make sure you can get your largest exhibit in and out. Take account of the DDA.

Security. Perimeter security is important and you may have to fit alarms (with arrangements for someone to respond to an alert), window bars and security doors. Also think about sight lines in galleries and place vulnerable items within the view of staff and other members of the public. Keep records of who has keys. Take advice from a local Crime

Prevention Officer or a museum security adviser.

Visitors. Allow adequate space for visitors, especially groups. If you have a room for schools and groups, it is useful if it has quick and easy access from the entrance so that arriving groups don't get in the way of other visitors.

Fire safety. Adequate fire exits, escapes, extinguishers and detection systems are required. Your local fire brigade can advise. These, and an evacuation procedure, should be tested regularly. You are responsible for carrying out your own fire risk assessment. See the AIM Focus Paper on *Risk Assessment and Insurance*.

How do we house the collections?

Different types of collection need different conditions, but all need stable temperature and humidity. Textiles, art and natural history need a carefully controlled environment with light, pests and mould excluded; stonework and large industrial items are more robust.

The Museums and Galleries Commission (the forerunner of MLA) produced standards for the care of different classes of museum collection. These can be found on the Collections Link website.

Think about where you site the museum store, how large it needs to be and how often you need to move things. If you can't produce a perfect environment in the whole store, think about creating microclimates for vulnerable items in small areas or cupboards. Remember, producing ideal conditions through air-conditioning uses considerable energy, is unfriendly to the environment and expensive to run. Ask your architect to look at passive environmental control systems.

Watch the floor loadings for heavy items, remember that attics have a greater temperature range than lower rooms, and avoid spiral staircases – a nightmare to carry things up and down! It is also worth thinking about whether you could pool resources and share stores with other local museums.

How do we use the collections?

Museums enable the public to learn about the objects, stories and information that they hold, and to participate in their activities. These are the fundamental purposes that enable a museum to be recognised as a charity. Permanent galleries, interactive displays, activities for schools and families, publications, websites, events and lectures are all part of most museums' programmes. Most also have at least a small area for temporary exhibitions in order to attract repeat visitors to something new.

In many ways documentation is the key to using your collection. Once you have captured information about your collection, you will have an infinite resource to plan exhibitions, publications and events. Linking these

to the National Curriculum is the best way of ensuring that schools are able to use the museum. Try to involve local teachers in your plans.

How do we staff the museum?

Employing staff is a big step and requires considerable resources. You are unlikely to receive any funding for general staff from local authorities, the Lottery or charitable trusts. However, if you can create discrete projects, such as the development of an exhibition or a schools' pack, you may find funding for temporary staff. Think also about sharing staff with other local museums or heritage organisations.

Museums are attractive places for volunteers to work and to a greater or lesser extent you are going to depend on them in every aspect of your work. Local papers or volunteer centres may help you recruit volunteers. Sensitively provided training is needed, even for those who bring expert knowledge, from accountancy to zoology. Many museums find it useful to have volunteer contracts and job descriptions – and the occasional social event to thank them for their work. AIM produces a Focus Paper *Working with Volunteers: An Introduction to Good Practice*.

How do we make money?

Even the best-funded public museums are required to generate their own funds to some degree. Income can be generated from:

Admissions. Consider your ticket prices in relation to other attractions in your area. Think about 'special offers' in relation to audience development, eg. special events for young people, cheaper rates at certain times of the year, free entry for children etc. In assessing your potential annual income do not multiply your standard admission charge by the expected number of visitors: remember at least 50% of your visitors will come at a discount. Some of your visitors may be able to Gift Aid their admissions, increasing the value to you, but they must either donate 10% above the standard price or you must offer free return visits for 12 months. Guidance on Gift Aid can be obtained from <http://www.hmrc.gov.uk/CHARITIES/giftaid-charities/how.htm>

Retail. In small museums the shop is best situated at the reception desk so that staff can sell admission tickets and serve customers. Sell a range of stock, including some items for children and a few items developed from the museum's own collections.

Cafés. Many museum managers advise letting a café on a franchise basis rather than running it directly. Although this can provide useful income, think how you will control the standards as they will reflect on the museum. If you run it directly you need to consider very carefully the outlay on fitting it out, staffing, food range and the legislation you need to comply with. Some cafés lose money. Simple – or no café at all – may be best.

Questions for the early stages of planning

- How do we make the most of the heritage we are trying to preserve?
- Does the history of the building or site add to its interest as a museum?
- Do we want a museum?
 - If we don't, what will we do with the collections we have?
 - What else could the building or site be used for?
 - Could we create a virtual museum instead?
- If we do, what sort of museum do we want?
 - How will it be funded?
 - Do we have a viable business plan?
 - Who will be our visitors?
 - How often will it be open?
 - How much will they be willing to pay to visit? How frequently will they return?
 - Can we meet their comfort needs (toilets, access, refreshments)?
 - Is there disabled access?
 - Is the building easy to find?
- Who will be our competition? Can we learn from those places?
- How will it be staffed? Will we have volunteers or paid staff?
- Will we need staff in all public areas, or can we make the displays secure so that they don't have to be permanently manned?
- Do we want real objects/archives/pictures on display, or could we display copies instead?
- Is there the potential for school and group visits?
- Do the trustees have enough time and skills to set up a museum?
- How long do we need to plan and fundraise for the museum?
- What have we got in the collections?
 - Objects?
 - Pictures?
 - Archives?
 - Oral history?
 - Who owns them?
 - Are they interesting or attractive enough to display to the public?
 - What stories can they tell?
- What storage/display conditions do they need?
- How shall we catalogue the collections?
- How shall we make them available to researchers/enquirers?
- Can they be used for educational projects or academic research?
- Do we want to add to the collections?
 - What do we want to collect?
 - Do we want to borrow items from other museums, archives etc?
- Are there other facilities that could be developed to make the museum viable? (shop, catering, wedding venue etc.)
- Are there partnerships with other related organisations that could be developed (eg. sharing of staff, storage, joint exhibitions and marketing)?

Museums Galleries Scotland publishes *Big Questions, Big Answers* – a booklet which will guide you through the process of planning your objectives using similar questions to these and lots of examples from different museums and heritage organisations. It can be downloaded from their website, www.museumsgalleryscotland.org.uk

Venue hire. Hire for events, film locations, birthday parties, lectures and corporate entertainment is a growing area for museums. However, it may need extra staffing, cleaning and security, and should not compromise the safety of the collection. You need a special licence to operate as a wedding venue, and you may need other licences for public entertainments, music and the selling of alcohol.

Copyright. You may have images in your collection that are in your ownership and of interest to publishers, television companies etc. Charge a fee for their use: ask other museums about their rates.

Marketing. Every museum needs an advertising leaflet. One third A4 size fits most display racks, and it's worth having the museum's name at the top where it won't be hidden by someone else's leaflet. Beware of information (especially price and opening hours) going out of date before you reach the end of a print run. You could ask your volunteers to help distribute it or use a distribution company to spread it over about a 20 to 30 mile radius from the museum. You may find it more worthwhile to join a marketing consortium of perhaps all the museums from a specific county or a group of specialist museums.

The internet is increasingly used by potential visitors, so it is important to have an interesting website and to make sure it is updated regularly. A database of email addresses of museum stakeholders, Friends and visitors provides a quick, cheap way of sending information about exhibitions and events.

It is worth keeping good records from all your income-generating activities and market-

ing – not only to keep your treasurer happy but also to see which ideas work best.

There are further AIM Focus Papers on fundraising, retail, venue hire and catering and there is information about copyright on the Collections Link and Museums Association websites.

Feasibility studies and business planning

Having considered these questions, it is necessary to address them in detail in a formal feasibility study and/or a business plan. These documents will be required by most funders and offer an excellent opportunity to ensure your proposed project is properly thought through.

At this stage you will need to find out much more about your potential audience. Your local authority, tourist office and any regional cultural agencies may have demographic data you can use or may have carried out surveys in your area about people's participation in the arts. There may also be databases of schools that regularly use museums. You will also need to carry out market research on competitors and on whether what you have to offer visitors is going to be of real and continuing interest.

You will also need to plan in detail how much you will need for development costs, what you need each year to be financially viable and how much you will need in the early stages of planning for architects', research and legal fees. Perhaps the most important question at this stage is to consider if your group has the skills to undertake this

kind of project or whether you need training or to recruit other trustees or staff with such skills.

How do we do it better?

Once you are up and running, consider evaluating your work so far.

Evaluation. It is always worth checking that your displays, events and publications are doing what you want them to do and that your public can understand them. Ideally you could create prototypes first; this is particularly worthwhile with expensive items such as interactive displays and computer resources.

Find out more about your audience. Visitor surveys are a useful tool to find out more about what your visitors have come to see, where they have come from, how they heard about your museum etc.

Museum Accreditation. Accreditation is a scheme that ensures museums throughout the UK achieve agreed levels of competence in governance, management of collections, services and facilities. Accreditation ensures that every museum is capable of meeting a minimum standard when holding collections in trust for society, whether it is a small community collection or a national institution.

The benefits for museums achieving Accreditation are that it demonstrates to grant-awarding bodies such as the HLF that a museum is a credible, worthwhile and well-run organization, and it encourages confidence among potential donors and visitors. Some grant schemes are only open to Accredited museums.

Further information

Websites

Collections Link

www.collectionslink.org.uk

AIM (Association of Independent Museums)

www.aim-museums.co.uk

Museums Association

www.museumsassociation.org

Museums Galleries Scotland

www.museumsgalleriesscotland.org.uk

CyMAL (Council for Museums, Archives and Libraries in Wales)

www.cymal.wales.gov.uk

MLA (Museums, Libraries & Archives Council)

www.mla.gov.uk

Charity Commission

www.charity-commission.gov.uk

Companies House

www.companieshouse.gov.uk

Health & Safety Executive

www.hse.gov.uk

Your local authority website

Heritage Lottery Fund

www.hlf.org.uk

Big Lottery

www.biglotteryfund.org.uk

Awards for All

www.awardsforall.org.uk

RIBA

www.architecture.com

Commission for Architecture and the Built Environment

www.cabe.org.uk

Publications

The AIM series of Focus papers, all available to download free of charge under an AIM/MLA (Museums Libraries & Archives Council) Scheme – *Governing Independent Museums, Using Museum Consultants, Working with Volunteers; Fundraising for*

Museums, Retail Guidelines for Small Museums, Successful Museum Cafés, Basic Conservation & Environmental Monitoring, ICT for Museums, Risk Management & Insurance, Venue & Location Hire, Creating & Implementing Forward Plans.

Manual of Curatorship: A Guide to Museum Practice, ed. John M.A. Thompson, Butterworth Heinemann, 1992, 2nd edn. rev.

Standards in the Care of Museum Collections available as downloads from the Collections Link website

The Manual of Museum Planning, ed. Gail Dexter Lord and Barry Lord, Stationery Office Books, 1999, 2nd edn. rev.

Museum Basics, Timothy Ambrose and Crispin Paine, Routledge, 2005

The Leicester University bookshop is a good supplier of museum-related publications – www.le.ac.uk/bookshop.

This paper is a new version of *Getting Started: Setting Up & Running A New Museum*, written by Tony Hirst OBE, then Director of The Boat Museum, Ellesmere Port, in 1999.

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