



**Association of
independent
Museums**

Helping Heritage
Organisations Prosper

Success Guides

Successfully
setting up a
new museum





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*Emma Chaplin &
Heather Lomas*

Front cover picture: Teign Heritage Centre, home to Teignmouth & Shaldon Museum, opened in Teignmouth in 2011. The original museum, housed in an 18th century building, was given a £1.1m transformation and annexe, thanks to funding from a number of sources including the Heritage Lottery Fund, the CABE/ Sea Change Initiative and English Heritage.

Successfully setting up a new museum

Setting up a new museum will be a lot of work. It will probably need the active support of many people, organisations and funders.

This success guide aims to help groups or individuals in the UK who are thinking about setting up a new museum make some informed choices. It may be that after reading the guide you decide that a museum is not the right approach for you and hopefully we can signpost some other options. If you do decide to continue with setting up your museum, the guide aims to give you a structure that will help you build a strong and successful museum and avoid potential pitfalls. It is not intended to be (nor could it be) an exhaustive guide but it provides an overview of the scope of the work involved.

What is a museum?

The term 'museum' can be used to describe a range of different types of organisations and different types of visitor attractions. This guide presumes that a museum will include some important key elements:

- Care of a collection will be central to what the museum wishes to do.
- It will also wish to provide access for the public to its collection(s).
- Its governance and planning will be designed with a long-term view, so that it can preserve and share its collections in the future.

Although this guide is designed for museums which are (or will be) established for public benefit it still offers useful advice and principles if you are concerned with a collection in private ownership.

A clear vision

Setting up a new museum will be a lot of work. It will probably need the active support of many people, organisations and funders. In order to attract and retain the interest of those people, and in due course of the people you want to visit the museum when it opens, you

need to have a clear and compelling vision of what you are trying to achieve. The vision should paint a picture of what you want your museum to be like and who your visitors will be. It should be people-focused, because a museum is about bringing together people and collections and so it should paint a picture, unique to you, about how you are going to do that. Whilst a group can be motivated for a long time by the desire to 'have a museum', it is very important to go further than this and be able to describe the type of museum you want to have, what sorts of experiences you will offer to visitors, what it will feel like to visit, how long a visit will last? The clearer you can be about all these things, the more compelling your plans will be and the easier it will be to attract the support, and in due course, the visitors that you need.

Many members of the Association of Independent Museums started with a passion, a collection and a group of hardworking and committed people who were determined to share their enthusiasm for a subject or historic site with a wider audience. Contact similar museums in your area, or with similar collections, and see what you can learn from their experiences.



Arundel's new museum in West Sussex opened in 2013 following a complex project directed entirely by volunteers. The images show a poster outside the new building; the new building nearly completed on the banks of the River Arun, and the opening by the Duke of Norfolk (also pictured, from left, one of the project's guiding lights, Rosemary Hagedorn, and Marilyn Scott representing the Heritage Lottery Fund, which supported the project).



Other options to consider

A museum isn't the right approach for everyone or every heritage project. There are alternatives that have less of an emphasis on a collection of objects and can be less of a long term commitment but can still provide an exciting and educational experience – for example, a visitor centre, a discovery trail, a 'virtual museum' website or information panels. You might realise that your ambition is to preserve a historic building or site and that may not be the same as setting up a museum.

Museums Galleries Scotland has an excellent publication that can help you consider which of these options might

suit you best. It is called "Big Questions, Big Answers" and it can be downloaded free of charge from their website at <http://www.museumsgalleriesscotland.org.uk/research-and-resources/resources/publications/publication/19/big-questions-big-answers>

How does the museum world work?

Museums are part of a thriving UK cultural sector and range from the large 'national' museums, such as the British Museum, which are funded primarily through central government, through to museum services provided by local authorities (both large and

Accreditation is a UK wide standards scheme for museums and galleries that defines good practice and agreed standards.

small), and museums run by universities and the military. There is also a large group of 'independent' museums. They are typically charitable organisations that are funded through a mix of earned income, grants and sponsors. Independent museums range from the large – e.g. Ironbridge and Beamish, to small, volunteer-run community museums and many shapes and sizes in between.

The lead bodies for museums in the UK are:

- Arts Council England
<http://www.artscouncil.org.uk/what-we-do/supporting-museums/>
- CyMAL: Museums Archives and Libraries Wales, a policy division of the Welsh Government
<http://www.wales.gov.uk/cymal>
- Museum Galleries Scotland
<http://www.museumsgalleries.scotland.org.uk>
- Northern Ireland Museum Council
<http://www.nimc.co.uk>

Their webpages will give you an idea of the type of support that they offer to museums.

There is also regional and local support available for museum development across the UK, provided through the government bodies listed above and sometimes through local authorities. The AIM website provides a directory of what support is available in your area – <http://www.aim-museums.co.uk/content/mdos/>

Accreditation – the UK standard for museums & galleries

Accreditation is a UK-wide standards scheme for museums and galleries that defines good practice and agreed standards. It aims to provide a benchmark quality standard that museums can use to develop and improve their services. It is scaled so that museums of different types and sizes can all gain the Accreditation Standard.

You may or may not decide that becoming an Accredited Museum is the right approach for your new museum. There are approximately 1,800 Accredited Museums in the UK and the first step is to complete an Eligibility Questionnaire. Accreditation is definitely worth consideration for your museums as some funders in the sector expect museums to be Accredited or to be 'Working towards Accreditation'.

The contact point for:

- museums in **England** is Arts Council England –
<http://www.artscouncil.org.uk/what-we-do/supporting-museums/accreditation-scheme/>
- museums in **Wales** is CyMAL: Museums Archives and Libraries Wales –
<http://wales.gov.uk/topics/cultureand-sport/museumsarchiveslibraries/cymal/museums/accreditation/?lang=en>
- museums in **Scotland** is Museums Galleries Scotland –
<http://www.museumsgalleries.scotland.org.uk/standards/accreditation/>
- museums in **Northern Ireland** is Northern Ireland Museums Council –
<http://www.nimc.co.uk/accreditation/>

Feasibility study

Setting up a new museum is challenging but running it can be even more of a challenge if the expected visitors, income or volunteers do not materialise. Undertaking a feasibility study of your plans at an early stage can ensure you avoid this type of unwelcome surprise! The study will become a key part of how you explain the viability of your plans to others. It is often commissioned in its entirety or in part from consultants, though you may have the skills to undertake it in house.

A feasibility study is as much about thinking about your future business

and operations as it is about exploring potential sites and architecture. You may only have one option for a site for the museum or many; these should be carefully explored as the location of a museum can have a big impact on the number of visitors it receives. You also need to ensure that the buildings are or can be made accessible for visitors and can provide the right environment for collections.

As well as looking at the physical location and space requirements of the museum, the feasibility study should describe the experience the museum will offer and the benefits it will bring. Collections should be considered at this early stage – for example, it should ensure the building is appropriate for the collections to be displayed and stored. It should include sections on the market – who the visitors will be and their needs and interests; analysis of the market for any other key income streams such as venue hire; analysis of competitors and comparators; an outline of what it will cost to create the museum and what it will cost to run it on a long-term basis. Visitor number projections (based on a good understanding of the experience that will be offered) are a key part of the feasibility study and are usually best undertaken by a consultant, and may also carry more credence when this is the case. This should all assist in putting together an outline Business Plan for your museum.

Where to start?

The Accreditation Standard provides a useful outline for the building blocks of a successful museum.

There are 3 Sections in the Standard

- **Section 1 Organisational Health**
- **Section 2 Collections**
- **Section 3 Users and their Experiences**

What follows is not a full list of Accreditation requirements but some of the key elements in each section

that you would be advised to address as part of the planning process and as you get your museum up and running.

Creating a healthy organisation

This refers to making sure that the organisation you set up to manage your museum has the appropriate structure and resources to survive and thrive.

- Start by creating a **Statement of Purpose** for your museum. This is a simple statement that should back up your vision for the museum and explains what your museum is there for and what it is trying to achieve. Creating a statement of purpose is a useful exercise so you and your colleagues can be clear what you are aiming to do and you can tell potential interested parties what you are trying to do too.
- Agreeing a suitable **Constitutional Framework** for your museum. If you are planning on becoming Accredited you need to choose a governance model that is acceptable to the Scheme (you can check this in the Accreditation Guidance materials). Advice on models of governance that may be appropriate to your museum and further information can be found in the AIM Success Guide on governance, Successful Governance in Independent Museums – http://www.aim-museums.co.uk/content/success_guides/.
- Premises. Can you obtain **secure occupancy of premises** for your museum? Where will your museum be housed? Do you need extra premises to store your collections or for other activities? Ensuring that you have a secure basis for occupying your premises, either through ownership or a long lease or similar, is vital for the museum to be able to plan effectively and to also convince potential partners and funders that you are a sustainable and resilient organisation. In securing the right building you will also need to

A feasibility study is as much about thinking about your future business and operations as it is about exploring potential sites and architecture.

consider issues such as running costs, being able to control the environment (e.g. light, temperature) so it is suitable for your collections, maintenance, security, health and safety and, of course, space for your visitors. It is also worth remembering that the location of your museum will have an impact on the number of visitors you will attract and how easy it is for volunteers to get to you.

- **Financial matters.** How much money will your museum need to operate? Where will this money come from? As an independent museum you will probably need to generate much of your own income – an entrepreneurial approach is essential! You may be able to charge for admission, earn money from a shop or café or other related commercial activities – e.g. venue hire. You also need to test that your ideas for making money will do just that! it is easy to assume a shop or café will earn money but they can also cost you a lot of money to run.

You may also be able to fundraise through a supporters group, sponsorship or an ongoing programme of fundraising initiatives. External funders – e.g. Heritage Lottery Fund, are often able to support specific projects or developments but can rarely help with day to day running costs. Gift Aid may be another potential source of income for you if you are a charity – <http://www.hmrc.gov.uk/charities/gasds/claim.htm> You need to work out how your museum can pay for itself. Further advice can be found in the AIM Success Guides – http://www.aim-museums.co.uk/content/success_guides/

- **Your workforce.** Who is going to carry out all the things you are hoping to do at your new museum – from cleaning the toilets to creating exhibits? Start by looking at the skills you will need on your team and then by writing down outlines of the roles (either for paid staff or volunteers) that you will need to fill. If your governance

Many new museums are housed in historic buildings, while others require a new-build. The Lightbox in Woking takes shape in this image. Opened in 2007 it won the Art Fund Prize a year later.



structure means that you will have Trustees, getting the right mix of skills and experience on your Trustee board is one of the most important things you can do, so start here if you can. If you are going to involve volunteers in your organisation there is a lot of help available on how to go about this successfully. It is easy to underestimate how much time and resources a good volunteer programme needs to run successfully. As well as the AIM Success Guides, a good starting point for advice is your local volunteer centre if you have one.

Volunteering England – <http://www.volunteering.org.uk>;
the Welsh Council for Voluntary Action – <http://www.wcva.org.uk>;
Volunteer Scotland – <http://www.volunteerscotland.org.uk>
and Volunteer Now in Northern Ireland – <http://www.volunteer.now.co.uk>. There is also an AIM Success Guide, Successfully Recruiting and Retaining Volunteers – http://www.aim-museums.co.uk/content/success_guides/

- When your ideas start to come together it is essential to create a **Forward Plan or Business Plan** for your museum. This will set out what you are hoping to achieve over the next few years and how you intend to do it. It can be a useful tool for you and your colleagues to monitor your progress and also to demonstrate that you are a serious organisation worth investing in for potential supporters. There is an AIM Success Guide, Successful Business Planning, which can help you with this process – http://www.aim-museums.co.uk/content/success_guides/

Collections

Collections are at the heart of museums and managing them effectively will be essential to the success of your museum in both the short and long term. They need to be

properly documented and cared for so that access to them can be maximised. Collections need an investment of both time and money to be managed properly – it is possible for collections to become liabilities for the museum if this does not happen.

In the first instance you need to think in terms of effective **collections development**: making sure that you create a museum collection that can support the museum's key purpose and aims and objectives. Museums acquire collections mainly through donations, but objects can also be purchased and loaned. All objects you acquire should be cared for appropriately and maximum public access to collections should be achieved. Tackling this in a planned way that means you will be able to care for and make good use of your collections is a vital step on the way to developing a successful museum. You need to have a policy to inform this area of work to ensure that you only collect what is appropriate to your museum and what you are able to care for responsibly.

A key document for this area will be a **collections development policy**, outlining the status of the current collections, the themes and priorities for future collecting and any areas of a collection which require review or rationalisation. It is a valuable tool for being able to say 'no' to potential donations too. In order to ensure collections development policies comply with museum ethical codes for acquisition and disposal and that relevant legislative frameworks are adhered to, Arts Council England provide an outline framework for museums to follow. This is available on the Accreditation pages of the Arts Council England website www.artscouncilengland.org.uk. The collections development policy should be approved by the governing body, but everyone in the organisation should understand and adhere to it. It should be sustainable, taking account of the resources available at the museums, such as storage space and

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Understanding who will use the museum, and what they will want to see and learn about, is fundamental to the success of the museum.

time available from staff and volunteers to manage collections. The policy should underpin the direction the museum follows in the future.

A range of resources is available to guide museums in development of effective policies, plans and procedures. Collections Link is an online resource – www.collectionslink.org.uk – and a good place to start for free access to resources on standards for collections management, fact sheets and discussion forums, plus information on publications that can be purchased to support collections management.

Visitors, interpretation and education

- Understanding **who will use the museum**, and what they will want to see and learn about, is fundamental to the success of the museum. Knowledge about visitors and users helps museums to focus on the objects it wants to collect and the stories, events and interpretation that will be available in the museum. A museum should provide a range of high quality, stimulating experiences for visitors which enable access to collections and provide opportunities for enjoyment and learning. Researching the views of potential visitors and trying out your ideas for interpretation with them will be an essential part of planning your new museum.

How will you inspire and inform your visitors?

- Museums have a unique role in offering **stimulating interpretation and engaging learning experiences** for all visitors and users. A useful first step in deciding how to tell the stories associated with the museum and collections (referred to as interpretation) is to define the themes or stories the museum wishes to tell. Developing an interpretative plan or strategy will ensure that the results of

consultations with potential visitors and stakeholders are reflected in the interpretative planning. You can then think about how you will start to display your collection.

- The Heritage Lottery Fund has produced a simple but comprehensive guide to interpretation planning which also includes information about typical costs of different types of interpretation – http://www.hlf.org.uk/HowToApply/goodpractice/Pages/Interpretation_guidance.aspx#.Us_k-6Xavwl
 - Museums use a range of materials and techniques to interpret the collections. Your museum displays could include a selection from:
 - Interpretative information panels
 - Hands-on interactives
 - Film and audio
 - Oral history
 - Trails around the museum
 - Collections information available on computer screens in the galleries
 - Child-friendly interpretation packs for use in the museum
 - Guided tours
 - Audio guides
 - Specialist publications
 - Object handling collections
 - Digital applications to download
 - Online resources
- Consider having these made professionally. If you plan to do them in-house, ensure you have the necessary range of skills available, including text writing for different audiences. Make sure you consider the needs of people with different levels of ability. The Heritage Lottery Fund guidance provides more information on how to ensure that everyone can access and enjoy your new exhibitions.
- Think about how you will encourage repeat visitors to your museum – for instance, through being able to refresh your displays, different versions of an audio guide and offering events or temporary exhibitions.



Reality dawns for all new museums when the objects are positioned in the new galleries. This is at Teign Heritage Centre.

Additional opportunities for learning

Learning is central to a museum's purpose. In proportion to its size and scale, a museum should provide a choice of learning resources to support the needs of a range of users – both children and adults. For example, a museum may provide a selection of:

- Learning resources and packs for schools
- Specialist learning sessions for schools
- Talks and lectures for specialist and non-specialist groups
- Access to collections information via your website

The Group for Education in Museums (GEM) can provide further assistance – <http://www.gem.org.uk>

Looking after visitor needs – practical things . . .

- Museums need visitors, so it is **important that visitors can find you**; the first place visitors are likely to look for information is on a website. Making sure a website provides clear information about the museum's location, directions and opening times and provides a good flavour of what is on offer is important. Museums should also make sure that there is **adequate signage** inside and outside the building.
- As an organisation welcoming the public a museum needs to demonstrate a **good standard of customer care**, ensuring that all visitors experience a high quality visit. This commitment to customer care should be evident throughout

the organisation: treating visitors and users with courtesy is not just the responsibility of front of house workers but extends to all areas of the museum, including those answering queries from the public via telephone and email.

- Museums can participate in wider **visitor attraction quality assurance schemes**, which allow them to be assessed against agreed standards for customer care quality; examples of such schemes include AIM's benchmarking scheme, Visitor Verdict – http://www.aim-museums.co.uk/content/aim_visitor_verdict/; VAQAS – <http://www.visitengland.org/busdev/accreditation/attractions/VAQAS.aspx>; VAQAS Cymru – <http://wales.gov.uk/topics/tourism/grading1/schemes/vaqascymru/?lang=en>; Visit Scotland Quality Assurance – <http://www.visitscotland.com/quality-assurance> and the Northern Ireland Tourism Board Quality Assurance Scheme – <http://www.nitb.com/BusinessSupport/QualityAssurance.aspx>
- Following some basic principles should ensure visitors have an enjoyable and positive experience.
 - A museum should guarantee to **remain open for publicised opening hours**
 - Think about **additional facilities** for visitors and users for example, parking, a cafe, toilets and a shop. You may not be able to provide a full range of facilities at the museum, but you must be able to direct visitors to where they can find these in the local area.

10 Steps Towards Setting up a New Museum

There are key steps along the way to setting up a new museum. This is an outline of the order that you may find best to approach them.

1. Decide on the vision for and purpose of your organisation (is it a museum or not?)
2. Conduct a feasibility study to test your ideas.
3. Decide on the best governance structure for your organisation, taking legal advice as necessary.
4. Appoint key officers for your group/build a group of people to share the workload and your vision.
5. Research – test out your ideas/what wider support is there for your plans/maybe test some short term ideas – e.g. an exhibition, a series of talks. Talk to other local museums or similar museums elsewhere in the UK to find out if they have any advice they can offer you.
6. Find some premises and ensure you have a secure lease or freehold.
7. Start to put together a Business Plan which will outline what you want to do and how you are going to do it.
8. Fundraising and advocacy! Start working on a strategy and building relationships with potential funders, as early as you can. Make friends with potential partners, potential supporters, potential visitors – let the world know that you exist and how they can be part of what you are doing.
9. Make sure your collection is being managed well – a well cared for collection that is well used is at the heart of every good museum.
10. Do it! Start to provide a great new museum experience for your visitors but remember you never stop learning how to do it better.

Marketing and publicity

There is no point in having a wonderful museum if nobody knows that it exists! Marketing and publicity activities for your museum should start before it even opens so that people know that you exist, what you are going to offer, consider supporting you and look forward to visiting you when you do open.

A budget for marketing is important even in the smallest museum and as a minimum you should look at developing

- a website
- a printed leaflet (and a plan for how and where it will be distributed)

Further marketing can range from the expensive such as

- newspaper advertising
- TV advertising

to cheaper and even free outlets such as

- social media, e.g. Facebook, Twitter
- editorial coverage in newspapers
- emailing your supporters

The important thing is to have a planned approach to your marketing – how can you make your budget work most effectively? Who are the people you most want to reach? What do you want to tell them? There are often local or regional heritage or tourism groups that you can work together with.

Last but not least . . . legal matters

Your museum will need to ensure it meets its legal responsibilities. Taking professional legal advice as appropriate to your museum and its circumstances is advised. These are some of the legal areas you may need to be aware of:

- **Charity law** – the Charity Commission website explains more www.charitycommission.org.uk. Office of the Scottish Charity Regulator – www.oscr.org.uk

Case Study

Firing Line, Cardiff Castle Museum of the Welsh Soldier, first opened to the public in February 2009. Firing Line was a unique and ground-breaking concept developed through a joint vision of 1st The Queens Dragoon Guards and The Royal Welsh, replacing two Regimental Museums with a single museum representing the contributions of the Welsh Soldier throughout history. It is a world-class exhibition commemorating over 300 years of proud and distinguished history including the Battle of Waterloo 1815 and Rorke's Drift against the Zulus 1879, as well as recent service in Iraq and Afghanistan today.



Visitors at the new museum covering the story of the Welsh soldier, *Firing Line: Cardiff Castle Museum of the Welsh Soldier*

My Top 5 Tips for Opening a New Museum

1. Consultation is king! It's important to recognise current users of your services, but also to identify those new audiences that you want to engage with. Knowing your target audiences and users is an integral part of creating new displays and museum content.
2. Make the most of the time that you spend collaborating with designers and other contractors. Not only will you gain fresh ideas from them but by working closely with them, you will ensure that your museum is as 'fit for purpose' as possible.
3. When proof-reading have as many people (internal and external) read through text as possible. It really is true that you stop seeing mistakes. Also, don't be dis-heartened when you find mistakes once you have opened!
4. Don't be afraid to scrap ideas for interactive activities where necessary. Sometimes, design plans are scrapped for budgetary reasons. It is still possible to retain interactivity in the simplest ways. One of our most engaging areas at the museum is the dressing up area . . . popular with adults and children alike!
5. Collaborate and share knowledge. The best lessons are those learnt from past experiences and listening to the perspectives of other museums in similar situations.

Rachel Silverson
Curator

- **Tax and VAT** – HMRC website provides detailed guidance – www.hmrc.gov.uk
- **Health and Safety** legislation – the Health and Safety Executive provide a useful ‘Getting Started’ document – <http://www.hse.gov.uk/getting-started/index.htm>
- **Employment law** – the National Council for Voluntary Organisations has some very useful guidance on workforce issues – <http://www.ncvo-vol.org.uk/advice-support/workforce-development>
- **Data protection** – if you hold personal data (e.g. in a membership database or collections files – digitally or on paper) you will need to register with the Office of the Information Commissioner. More information here – <http://www.ico.org.uk>
- **Safeguarding** – protecting children and vulnerable adults in your care. The NSPCC has factsheets for how this works across the UK – http://www.nspcc.org.uk/Inform/research/questions/child_protection_legislation_in_the_uk_wda48946.html
- **Equality Act (2010)** – the SW Federation of Museums & Art Galleries website provides a useful guide and resources to help museums comply with the Act – <http://www.swfed.org.uk/resources/usersvisitors/access/relevant-legislation>
- **Treasure Act (1996)** – more information on how to comply with the law when gold, silver or prehistoric metal objects are found is on the Portable Antiquities Scheme website – <http://finds.org.uk>

Readers are advised that there may be some differences in Scotland and for further information to contact Museums & Galleries Scotland at Waverley Gate, 2-4 Waterloo Place, Edinburgh EH1 3EG. Telephone: 0131 550 4100. Email: admin@museumsgalleriesscotland.org.uk. Website: <http://www.museumsgalleriesscotland.org.uk/>

Emma Chaplin and Heather Lomas provide advice and support to heritage and museum organisations across the UK, supporting them to develop, flourish and succeed.

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