

# Making the most of your museums

A handbook for councillors



**Cover photo:** Lessons for primary school students moved to the National Waterfront Museum in Swansea for an innovative and successful pilot scheme (Amgueddfa Cyrmu)

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# Foreword

Museums are crucial to our sense of place and at their best, bring people together, expose people to new ideas and concepts, and instil a sense of pride in their communities. Councils value this – we are increasingly placeshapers, not just deliverers of services now.

Councils are directly responsible for around 350 museums in England, fund a lot more, and provide support to independent museums. Many councillors will also act as trustees, almost certainly on those museums that have spun out from councils, but also on independent museums. We do this because museums are important to us and to our communities, and will continue to be.

But, in the current funding climate, we also have to ask tough questions of our museums. Museums are not a statutory service. We don't have to provide them and we don't have to support them.

But should we want to do so? Yes.

Museums can deliver against some of our most pressing agendas. They have a great story to tell on improving public health, particularly around work with people with Alzheimer's or dementia. In Barnsley and others areas, they have taken on a critical function in bringing communities together and refashioning the community relationship with the council. Tourists and other visitors flock to our museums, boosting our economies; a strong museum can be a key anchor for a cultural quarter, and a major attractor of businesses.

However, if they are to do all this, then we have a responsibility to ensure they are given the political direction they need to prioritise their work; give them the freedom to communicate their offer on websites and social media; and empower them to seek the right training and networks to help them to be more commercial, innovative and creative.

The Mendoza Review of the museum sector commissioned by Government showed that, while the overall museums sector is in a reasonable state of health, our local public museums were struggling. I am pleased that we have been able to work with Arts Council England to produce this joint handbook to help councils respond to the challenges identified and to help their museums thrive.



**Councillor Gerald Vernon-Jackson CBE**

Chair, Local Government Association Culture, Tourism and Sport Board

# Introduction

Why do museums matter?

Can they support the delivery of local priorities?

Which operating models can they take?

Can they be successful enterprises?

If these are questions which resonate with you as a councillor, then this handbook is for you.

**“Museums use their collections and knowledge to support society in direct ways. They bring people together and promote community cohesion; they support learning, tailoring their programmes to the local curriculum and local education priorities; they assist scholarly research through partnerships with universities; they can promote better health – for example, using collections to work with patients with mental health issues; and they employ and nurture a wide range of skilled people. They also offer spaces where we can experience the beauty and understand our place in the world.”**

**Neil Mendoza, The Mendoza Review<sup>1</sup>**

Museums are integral to the cultural fabric of the UK. They are public spaces full of incredible collections and stories, which have the power to shape the present and the future of communities. As a councillor with responsibility for museums you are a custodian of collections; you ensure they are held and used for the public's benefit today and tomorrow.

Local government provides the backbone to a remarkable range of museums across England, running 346 accredited museums and supporting many more. The landscape of museums across England is rich and varied, from the Telegraph Museum in Porthcurno to Tullie House Museum and Art Gallery in Carlisle. In the context of this handbook, the term ‘museum’ includes art galleries, heritage sites, archives, historic houses and science centres operated or supported by councils.

In November 2017, the Department for Digital, Culture, Media and Sport (DCMS) published ‘The Mendoza Review: an independent review of museums in England’. It acknowledges that council museums have been particularly affected by funding cuts.

The Museums Association ‘Museums in the UK’ 2017 report<sup>2</sup> notes that at least 64 museums in the UK have closed since 2010 – the majority of these, as a result of reduced public funding. The report states that many publicly-funded museums are facing a funding crisis as “local authorities in England have cut spending on museums and galleries by 31 per cent in real terms between 2010 and 2016”.

This handbook has been developed in response to the Mendoza Review. It can help you identify the key ways in which councillors can support museums to be most effective. Museums can be a catalyst for positive social and economic change, meeting the agendas that are important to you and your communities.

<sup>1</sup> Neil Mendoza, 2017, The Mendoza Review: an independent review of museums in England. [www.gov.uk/government/publications/the-mendoza-review-an-independent-review-of-museums-in-england](http://www.gov.uk/government/publications/the-mendoza-review-an-independent-review-of-museums-in-england)

<sup>2</sup> Museums Association, 2017, Museums in the UK. [www.museumsassociation.org/download?id=1221931](http://www.museumsassociation.org/download?id=1221931)

If you see museums as an integral part of the local cultural offer when considering council services, activities and budget, you will be open to making connections across a range of service areas. The case studies in this handbook highlight some of the many ways in which museums are contributing to different local priorities. This includes the Black Country Living Museum driving local economic growth; Manchester Museum enabling community debate through 'a Rubbish Night at the Museum'; Tunbridge Wells Museum and Art Gallery creating greater wellbeing; and Barnsley and Rotherham councils using heritage to create great places to live.

Your council may already have considered different models of operation for your museum service. Planning a change in operating model is one which takes considerable time and financial investment. If a museum service is to have any chance of a sustainable future, a council will need to carefully consider the options available. These are explored in the 'choosing the right operating model, section of this handbook.

Museums, like any service, have costs, but an investment in museums is an investment in a public asset which can engage, educate and inspire entire communities. As a councillor, you are in the best position to ensure that, in the face of financial and demographic pressures, museums are recognised and used for the often intangible – but always essential – benefits they bring to communities.

### **The Mendoza Review and local government**

The Mendoza Review was completed following research into museums of all types across England – large, small, urban and rural. Unless otherwise referenced, statistics in this handbook are taken from the Mendoza Review.

The review recognises that next to central government, councils are the largest contributor to public funding of museums, contributing on average £253 million per year between 2007/8 and 2016/7.

There are specific recommendations within the review for how councils can make the most of their museums. These are:

1. Developing a cultural strategy, drawing on best practice and evidence that demonstrate how museums support local priorities and how councils can best support museums, even when revenue budgets are under pressure.
2. Supporting museums in forming partnerships with local education, health and culture providers to improve the public offer and to make potential savings. This might include brokering relationships with decision-makers; helping museums to measure their impact in order to deliver the evidence other organisations need, and publicly championing the role of museums in public life.
3. Ensuring that the local enterprise partnership (LEP) between councils and businesses includes museums as part of the local economic growth agenda, as well as in support of the cultural offer, in order to promote tourism and economic regeneration.
4. Brokering other effective partnerships for museums with local businesses.
5. Recruiting and developing excellent museum leaders with appropriate skills, including business management, fundraising, a commitment to growing and diversifying audiences, delivering cultural education, placemaking and partnerships – and then giving them the freedom to operate.
6. Reducing the barriers to enterprise for museums and actively supporting and encouraging their efforts to generate income. For example, allowing museums to retain commercial profits; granting them communication and digital freedoms; and considering how to allow museums to manage their self-generated income and reserves across financial years.

This handbook explores these recommendations and highlights the role you can take in responding to them. As a councillor, you can play a key role in the promotion and development of museums as demonstrated by Councillor Janet Emsley in Rochdale who highlights the benefits of hosting a well-loved museum exhibit in a council building.



## Dippy on Tour in Rochdale: council stages world-famous exhibit

From 2018 to 2020, the Natural History Museum is touring Dippy the Diplodocus across the UK. Rochdale's Number One Riverside is one of eight venues which will host Dippy during the tour. As a multi-use public building including a library, council customer service centre and office space, it is unique among the buildings chosen by the Natural History Museum as a host.

Rochdale's Number One Riverside is the council's award-winning customer service centre, office building and central library. Rochdale Borough Council has been working in partnership with Touchstones Rochdale Museum and Art Gallery to submit a bid to host Dippy and to prepare a programme of activities to coincide with the exhibit which will run from February to June 2020.

Through the exhibit, they are aiming to inspire and engage children and adults from across the northwest of England, particularly those who would find it difficult to access national exhibits in London. Cultural and educational activities exploring science,

technology, engineering and maths will be put in place to coincide with Dippy's stay. Councillor Janet Emsley, Cabinet Member for Culture, Health and Wellbeing at Rochdale Borough Council, said:

"This must be the first time an internationally famous museum exhibit has been placed in a council building and I think it is fantastic. In doing this, both ourselves and the Natural History Museum are bringing the Natural History collection right to people's doorsteps and that is a once-in-a-lifetime opportunity for our young people, many of whom would not be able to see these incredible artefacts in their usual home.

"As a Borough, we recognise the value of learning from the past and the importance of planning carefully to protect our future. Dippy provides a modern-day tool for us to explore, debate, educate and share ideas about the world in which we live and our role in it. Dippy will bridge sectors from science, culture, health and wellbeing to permeate into our schools, learning institutions and beyond. In short, Dippy is an opportunity we cannot miss and we plan to grab it with both hands!"



Dippy on Tour will engage children and adults from across the country with dinosaurs and more

# Why museums matter

“Watching crowds of children pouring into Bolton Museum, some almost overwhelmed with their passion for the Ancient Egyptians, is a reminder that honest, modern presentation and far-sighted cultural investment can revitalise towns that have lost their industrial past with a very real, modern pride.”

Samira Ahmed, *The Guardian*<sup>3</sup>

- 3 Samira Ahmed, 2019, The lure of Ancient Egypt is a way to revitalise faded industrial towns. [www.theguardian.com/commentisfree/2019/jan/21/lure-ancient-egypt-revitalise-industrial-towns-mummies](http://www.theguardian.com/commentisfree/2019/jan/21/lure-ancient-egypt-revitalise-industrial-towns-mummies)
- 4 LGA, 2016, Museum survey of heads of cultural services. [www.local.gov.uk/sites/default/files/documents/museum-survey-heads-cultu-696.pdf](http://www.local.gov.uk/sites/default/files/documents/museum-survey-heads-cultu-696.pdf)

A recent survey of museums by the Local Government Association (LGA) investigated the extent to which museums and culture are contributing to wider corporate priorities. As outlined in the table below, most respondents scored highly across tourism, learning, placemaking and regeneration, economic growth, community cohesion, and health and wellbeing.

As a councillor, you can use your position to highlight where you see museums having this impact across local priorities and where they have the potential to do more.

## To what extent are authority museums and culture contributing to corporate priorities?<sup>4</sup>

	Great or some extent	Great extent	Some extent	No extent	Don't know	Not applicable
	%, 83 respondents					
<b>Tourism</b>	94	47	47	2	0	4
<b>Learning</b>	90	47	43	5	0	5
<b>Placemaking and regeneration</b>	90	37	53	6	0	4
<b>Economic growth</b>	87	28	59	6	4	4
<b>Community cohesion</b>	84	18	66	11	1	4
<b>Health and wellbeing</b>	83	12	71	12	1	4
<b>Devolution</b>	10	0	10	60	13	17

The case studies which follow highlight where museums have been successful in meeting these local agendas.



## Placemaking

“Great placemaking makes people feel a renewed love, passion and pride for their ‘place’. It draws on the combined assets of heritage, people, buildings and landscape to create places for people to fall in love with.”

Polly Hamilton, Vice Chair of the Chief Cultural & Leisure Officers Association (CLOA)<sup>5</sup>

Museums help us to value the places where we live, work and visit, and to understand where we have come from. They play an integral role in creating a sense of place and belonging for people. Their collections and buildings are unique assets which often tell the stories of a local place, the people who lived there and their influence on the wider world. Communities have their own cultural identities, shared histories, infrastructure and traditions. Museums are ideal spaces to explore these.

This has been demonstrated through museums’ participation in the Great Place Scheme, a programme designed to pilot new approaches that enable cultural and community groups to work more closely together and to place heritage at the heart of communities. The National Lottery Heritage Fund and Arts Council England are funding 16 areas in England, and one of the successful joint recipients is Barnsley and Rotherham.

Key considerations for your area:

- Are your museums considered part of wider council regeneration and development plans?
- Are your museums connected to any local enterprise partnerships and, if not, can you broker an introduction?
- Do your museums lead on, or are they part of, a wider programme of cultural activities and events?
- Do your museums represent the people living in the area in their collections and events?

<sup>5</sup> LGA and CLOA, 2017, People, culture, place: the role of culture in placemaking. [www.local.gov.uk/people-culture-place-role-culture-placemaking](http://www.local.gov.uk/people-culture-place-role-culture-placemaking)

## WE project, Barnsley and Rotherham councils: stimulating social transformation and economic growth

Barnsley Museums operates five sites, including an archive service, which receive around 1.2 million visitors per year. Barnsley Metropolitan Borough Council has increased its funding to the museums service over recent years, with the culture and visitor economy service receiving an additional £100,000 revenue budget in 2016/17. The council has also taken steps to reduce barriers to enterprise, allowing the museums to become more commercial. In return, the museums and heritage sites are generating more income, including around £250,000 from Elsecar Heritage Centre, and supporting more than 350 jobs.

Rotherham Heritage Service operates Clifton Park Museum, Boston Castle and a range of small-scale heritage sites across the Borough, as well as archives, conservation and learning services, working with around 120,000 visitors a year.

Since 2017 Barnsley and Rotherham councils have been delivering ‘WE’ (Wentworth & Elsecar), a Great Place Scheme project. WE aims to embed a sense of place and use culture as an engine for social transformation and economic growth.

Through the project, Barnsley and Rotherham councils are reaching communities that were hit by the decline of traditional industries. In 2018 WE delivered a range of activities including: Man Engine (a two-day event for over 6,000 people); a community archaeology project with artistic interpretation; a living history project; and a series of innovation and creativity challenges for young people in partnership with engineering education specialists Workwise.

The project has received £1,264,000 from Arts Council England and the National Lottery Heritage Fund. Barnsley and Rotherham councils are each investing an additional £79,500 in the project.



Barnsley and Rotherham's WE project has engaged and inspired the local community

## Community cohesion

Community cohesion can only happen when the right conditions are created. Museums can play an active role in enabling these conditions. The LGA's 'Building cohesive communities' guide<sup>6</sup> states that in order for communities to flourish, there must be a shared belief in a set of common values. This means shared access for everyone and a belief that all sections of the community have an equal stake in the success and future of the local area.

The guide also acknowledges the role culture and sport can have in creating opportunities for people to come together and for tackling issues linked to cohesion. It states that planned programmes of activities can help to improve social interaction and have an extremely important role in promoting contact, integration, respect and understanding among people of different backgrounds. Culture and sport services, including museums, can be a powerful tool for engaging all sections of the community, breaking down barriers that may

exist between them, and helping to dispel myths and negative stereotypes.

Museums are places for everyone. As highlighted in the case study from Manchester Museum, they can provide a platform for debate and discussion on live local community issues.

Key considerations for your area:

- Are your museums working with other council departments and/or community groups which are tackling local issues, and if not can you broker introductions?
- Can your museum be used as a venue for community discussion and debate on local issues?

<sup>6</sup> LGA, 2019, Building cohesive communities. [www.local.gov.uk/building-cohesive-communities](http://www.local.gov.uk/building-cohesive-communities)

## A Rubbish Night at The Museum, Manchester: community leadership

'A Rubbish Night at the Museum' was a community-led event which took place at Manchester Museum in April 2018. This event explored the problem of rubbish in Greater Manchester in a creative and engaging way. It translated results of a research project and drew on contributions from a wide range of people to produce an interactive event. It supported Mayor Andy Burnham's goal of a cleaner and greener city region.

The purpose of the event was to present the complex causes of the rubbish problem in residential areas, prompt debate about the problem and inspire collaboration among those wanting to make a difference. It was organised by members of the Moss Side community in partnership with members of Upping It (a community group), the Manchester Museum, and the Sustainable Consumption Institute. It was funded by the University of Manchester's 'Engaging our Communities' fund and the Sustainable Consumption Institute.

Featuring over 100 artistic and informational displays, the event included verbatim theatre, spoken word poetry, demonstrations of clothing repair, discussions with policy and business representatives, and a video produced by primary school pupils. Participants took part in various activities and explored the displays over food and drink catered by Real Junk Food.

Over 300 people attended the event, the largest attendance for the museum. The event trended on Twitter and was taken up by BBC Radio Manchester and Manchester Confidential. It was mentioned in the 'Manchester Climate Change 2018 Annual Review' and was nominated for a Manchester Culture Award.







Derby Museum's selection of Joseph Wright works has been designated a collection of outstanding national significance by Arts Council England (see page 30)

## Tourism and economic growth

Tourism in the UK is worth over £126.9 billion, and employs more than 3.1 million people across the UK. In 2017, its exports were worth over £29.8 billion.<sup>7</sup> Similarly, arts and culture, including museums and libraries, make a substantial contribution to the UK and local economies, creating an estimated £29.5 billion for the UK economy in 2017 (1.6 per cent of the total).<sup>8</sup>

Eight out of 10 of the UK's most popular attractions are museums, according to the Association of Leading Visitor Attractions.<sup>9</sup> The Tourism Sector Deal, the long-term strategy for the British industry, recognises

that Britain is a well-established tourist destination for visitors from all corners of the world, and it acknowledges particular strengths in heritage and culture. The strategy suggests that tourism will continue to grow over the next 10 years, and also highlights an ambition to get more visitors beyond London.

Museums working alongside other culture, leisure and hospitality providers are well-placed to enable and support a growing tourist economy.

Key considerations for your area:

- Have museums been considered as part of a local tourism strategy?
- Is there a local tourism network and does it include representatives from museums?
- Could you broker introductions for your museums to key transport, visitor attraction, hotel or other holiday accommodation providers?
- Are your local museums part of any joint tourism initiatives?

<sup>7</sup> Visit Britain, 2017, Tourism Sector Deal. [www.visitbritain.org/sector-deal-uk-tourism](http://www.visitbritain.org/sector-deal-uk-tourism)

<sup>8</sup> DCMS, 2017, Sectors Economic Estimates. [www.gov.uk/government/statistics/dcms-sectors-economic-estimates-2017-gva](http://www.gov.uk/government/statistics/dcms-sectors-economic-estimates-2017-gva)

<sup>9</sup> Association of Leading Visitor Attractions, 2018, Annual Survey of Visits to Visitor Attractions. [www.visitbritain.org/annual-survey-visits-visitor-attractions-latest-results](http://www.visitbritain.org/annual-survey-visits-visitor-attractions-latest-results)

## Bath Museums partnership: collaboration for shared growth

Museums in Bath have been working collaboratively as part of a group of 13 visitor attractions to provide a more coherent and robust offer for visitors to the city. Bath has 16 museums and several other significant heritage attractions, ranging from the Roman Baths to small independents. They serve a local population of 90,000 and a visitor economy of 5.8 million annually.

In April 2015, Bath Museums partnership received a Museum Resilience Fund grant of £138,150 from Arts Council England to support 'Bath Museums Working Together'. The group included the Holburne Museum, the American Museum and Gardens, Bath Preservation Trust, the Fashion Museum and the Victoria Art Gallery.

The funding enabled the group to develop the partnership and improve audience development and marketing activity over one year. It included six targeted marketing campaigns which aimed to increase visitor

numbers, promote temporary exhibitions and increase average transaction value in museum shops.

The project impact report noted a 63 per cent increase in the average number of museums visited per trip. As a result of the partnership, marketing is more effective and less fragmented for the cultural consumer. There is a coherent museum sector in Bath which other organisations are keen to consult and work with, particularly the accommodation sector, Thermae Bath Spa and the Bath Bus Company.

"The collaboration continues, with a five-year strategy to work together now planned," says Celia Mead, Marketing Consultant to Bath Museums. "Each campaign we ran was evaluated for its success and the last one created the opportunity for 1.4 million people to see it and 25,000 showed some form of desire or intention to participate. Now the museums are recognised as a sector in the cultural, tourism and leisure landscape of Bath."



Visitors enjoying the exhibits at the Holburne Museum, part of the Bath Museums partnership



## Health and wellbeing

**“As we are living longer, the need to improve people’s health and quality of life has never been more important. There is real potential for museums, which have a purpose to help us learn and to share knowledge, to play a long-term role in supporting a healthier population. Museums and heritage venues bring people together at the heart of their communities, which helps both their physical and mental health at every stage of their life.”**

Duncan Selbie,  
Chief Executive of Public Health England<sup>10</sup>

According to the UK Office of National Statistics, the proportion of the population aged 85 and over is projected to double over the next 25 years. This demographic shift is increasing pressures on health services, social care and pensions. However, it is now widely acknowledged that the arts and social activities improve people’s mental and physical health. Rt Hon Matt Hancock MP, Secretary of State for Health and Social Care spoke in 2018 about their power to make us “happier and healthier”.<sup>11</sup>

The Culture, Health and Wellbeing Alliance (formerly the National Alliance for Museums, Health and Wellbeing) raises awareness of the role and potential of museums and galleries in supporting health and wellbeing. They note in their ‘Museums as Spaces for Wellbeing’ report that social isolation is an increasing challenge among older people and its detrimental effects on health are comparable to those of smoking and obesity. Isolation is correlated with depression and

cognitive decline. The number of older people reporting loneliness is predicted to rise from 5.25 million in 2013 to 7 million in 2030. Museums, with their emphasis on accessibility, wellbeing and community, are well-placed to intervene in this area.

Key considerations for your area:

- Are your museums working with local healthcare providers and/or clinical commissioners? If not, can you broker introductions?
- Do your museums work with other cultural providers (including libraries) to advocate and create a joint offer to support local health and wellbeing?



Publicity materials used to promote Tunbridge Wells Museum’s dementia programme

<sup>10</sup> Desmarais, S., Bedford, L. and Chatterjee, H.J., 2018, Museums as Spaces for Wellbeing: A Second Report from the National Alliance for Museums, Health and Wellbeing.

<sup>11</sup> Hancock, M., 2018, The power of the arts and social activities to improve the nation’s health. [www.gov.uk/government/speeches/the-power-of-the-arts-and-social-activities-to-improve-the-nations-health](http://www.gov.uk/government/speeches/the-power-of-the-arts-and-social-activities-to-improve-the-nations-health)

## Tunbridge Wells Museum and Art Gallery: tackling dementia with culture

The wellbeing of people living with dementia was markedly improved when they were encouraged to explore the collection at the Tunbridge Wells Museum and Art Gallery (now The Amelia, Tunbridge Wells) as part of a collaborative project with the Alzheimer's Society and Canterbury Christ Church University.

Object handling sessions were designed to give participants a sense of achievement and fulfilment through learning something new, and evaluation showed that feelings of wellbeing had significantly and steadily increased over the two-year project. A dementia toolkit designed for small to medium museums was developed as part of the project. The project was a finalist in the 2015 Dementia Friendly Awards.

Since this project, the museum has gone on to take part in the Museums on Prescription programme with Canterbury Christ Church University and University College London. Another clinical trial was undertaken which also showed the power of object handling on wellbeing. The project coordinator has become a 'Dementia Champion' who has trained over 100 Dementia Friends – including some in customer-facing roles at Tunbridge Wells Borough Council. This new focus on culture's impact on wellbeing also enabled the council to roll out 'Pause Boxes' (boxes to facilitate adult colouring mindfulness breaks) in each breakroom in every council-run office.

"Museums tap into our curiosity, a quality so primal that it's one of the last things to be effected by dementia," says audience development manager Jeremy Kimmel. "Museums can use the bizarre and the wonderful to engage, excite and intrigue people who feel they're slowly losing their humanity and help them to feel like themselves and not be defined by a disease."

## Skills and learning

Museums are centres of life-long learning. They connect and inspire children and adults across all communities. From running museums in schools – as seen at the Langley Academy in Slough, to supporting young people into work through programmes such as the apprenticeship scheme at the London Transport Museum – museums have a role to play in formal education and training.

A review of formal learning in museums by Arts Council England found that museums are offering a more responsive service for schools than they were 20 years ago.<sup>12</sup> It highlighted that external investment (from Arts Council England and the Heritage Lottery Fund) and the ability to generate income from this source was behind the development in this area. The review noted that the large majority of school visits to museums are made by primary schools.

Since 2012 Arts Council England has supported the Museums and Schools programme in conjunction with the Department for Education. The purpose of the programme is to provide all children and young people with the opportunity to visit and be inspired by museums. The programme has helped connect museums with local school children, targeting areas with high levels of deprivation and low cultural engagement.

**"Museum learning has a vital role to play in the cultural education of all children and young people. Thousands of school children throughout the country benefit from the unique learning environment that museums can offer."**

**Darren Henley OBE, Chief Executive, Arts Council England<sup>13</sup>**

<sup>12</sup> Arts Council England, 2016, *Now and the future: a review of formal learning in museums*. [www.artscouncil.org.uk/learninginmuseums](http://www.artscouncil.org.uk/learninginmuseums)

<sup>13</sup> As above.

Through initiatives such as the National Lottery Heritage Fund's 'Skills for the Future' training programme, museums have been offering work-based traineeships. In addition to specific heritage-based skills (for example curatorial or buildings management), museums are places which can offer transferrable skills such as event planning, visitor services and budget management.

Key considerations for your area:

- Do your museums provide activities which promote learning and skills development from pre-school to University of the Third Age? They may have a particular audience focus.
- Can you broker introductions to pre-schools, schools, universities, colleges and other education providers in your area?
- Can your museums offer apprenticeships? If they have the capacity to do so you can actively support these programmes.

### My Primary School is at the Museum: Pilot museum scheme hosts pupils

'My Primary School is at the Museum'<sup>14</sup> was a pilot project led by King's College London to explore the potential benefits of children receiving full-time lessons in a cultural setting. It ran between January and June 2016.

The three pilots in Liverpool, South Tyneside and Swansea took primary school children and relocated their classrooms into museums. In Wales a reception year of two classes (children four to five years old) from St Thomas Community Primary School was based at the National Waterfront Museum in Swansea for two five-week residencies. Teachers, parents and staff all remarked on the difference it made, with many children growing in confidence as they learned about the objects and were able to revisit favourite items. The museum's link with the sea was a popular theme and a team of marine biologists from Swansea University brought fish, snails and crabs from their trawl and encouraged the children to handle and talk about them.

<sup>14</sup> For further information, see: [www.kcl.ac.uk/SchoolsInMuseums](http://www.kcl.ac.uk/SchoolsInMuseums)



Studying at the Arbeia South Shields Roman Fort (Colin Davison)



The evaluation of the three pilots showed a range of outcomes for children in terms of increased confidence and improved social skills. The museums gained a deeper understanding of younger audiences that enabled the development of more relevant programmes, and teachers discovered more creative ways to deliver the curriculum in non-traditional spaces.



Primary school pupils at Tate Liverpool (Jake Ryan)

# Making the most of your museums

As a councillor you can champion what museums are achieving and help to drive improvement. This section explores the ways in which you can make the most of your museums. It specifically looks at the role you can take to ensure museums are considered in relation to:

- strategic/forward planning
- reducing barriers to enterprise
- communication and technology
- brokering partnerships
- evidencing and championing impact.

## Strategic/forward planning

Strategic plans for councils highlight priorities related to the economic, social and environmental wellbeing of their local areas. Integrating museums and what they contribute to communities into these plans will help the council to fulfil its duties more effectively. Museums should form part of any cultural strategy in your area.

Your council will have its own preferred ways of undertaking strategic planning. Similarly, accredited museums need to have their own forward plans in place, as laid out in the Accreditation standard. Accreditation is the UK standard for museums and galleries. It is a baseline quality standard. The scheme is managed by Arts Council England on behalf of a UK-wide Accreditation partnership. Funders such as the National Lottery Heritage Fund will look to whether your museum is Accredited or not when making decisions about funding.

Museum forward plans should align with council priorities and any wider cultural strategy. They should be based on consultation with internal and public stakeholders, and an analysis of the operating context and opportunities for museums. This inevitably takes time and investment of resources. If you can help your museums to understand what is going on across your council, it will enable them to plan more effectively.

### The Kirkleatham Project: area regeneration through museum strategy

Kirkleatham Museum's Forward Plan provided a catalyst for a wide-ranging review of the museum and its services at a time when, as a non-statutory service to the council, savings needed to be made. The museum was invited to submit its Accreditation Return in spring 2012, and while the development of its forward plan was underway Accreditation provided the impetus to prioritise the activity.

The forward-planning process has been hugely beneficial to the museum and its users, providing a renewed sense of purpose to drive forward an ambitious arts-focused programme, which aligns with the purpose and direction of Redcar & Cleveland Borough Council. There is a strong sense that the museum profile has been raised internally and externally, and that the council now owns the museum in a way which was not recognised before. This is evidenced by a new council initiative, known as 'The Kirkleatham Project', which will bring together the story of a local family which built Kirkleatham Old Hall and played an instrumental part in the history of Kirkleatham village and the surrounding area.





Tyne & Wear Archives & Museums have adopted a shared management model to look after their extensive collections (see page 33)

The project will provide a strong cultural focus for the area and will contribute towards the area's regeneration. It will benefit from the lessons learned by the museum team during the forward-planning process, and from the resultant re-positioning of the museum as a key contributor to the cultural life of the area.

Without the planning process and the rigorous re-alignment of the museum and its services, it is unlikely that the service would now be key to a regeneration project which will transform understanding of the area's local history.

## Reducing barriers to enterprise

Only with the freedom to effectively operate can museums start to generate greater income and have a wider impact through their work. The Mendoza review highlighted a great disparity across museums and their ability to generate their own revenue. It noted that national museums and Arts Council England Major Partner museums (now National Portfolio Organisations) raised on average

46 per cent of their own income in 2015, while independent museums raised around 70 per cent of their own revenue and council museums raised around 13 per cent.

'The Future of Civic Museums: A think piece' notes that "although museums now earn a greater proportion of their own income, such changes in operation take time to be effective and are rarely sufficient to cover all of a museum's costs". It goes on to say that "the threat to civic museums' financial model is immediate and existential, for many, there will be an issue of survival while freedoms and adaptability are developed".<sup>15</sup>

There are many ways in which a council can reduce barriers to enterprise and ensure freedom for museums flourishes.<sup>16</sup> The best council museums have control of their operations, finances, branding and communications. They have security of tenure and they hold museum collections as cultural assets for their communities.

15 English Civic Museums Network, 2018, The Future of Civic Museums: A think piece. [www.nationalmuseums.org.uk/media/documents/publications/civic\\_museums\\_think\\_piece.pdf](http://www.nationalmuseums.org.uk/media/documents/publications/civic_museums_think_piece.pdf)

16 Museums interested in exploring the Museums and Galleries Tax Relief will find resources at: [www.artscouncil.org.uk/supporting-arts-museums-and-libraries/museum-gallery-exhibitions-tax-relief](http://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/museum-gallery-exhibitions-tax-relief)

Key considerations for your area:

- Does your museum generate its own income?
- Can your museum retain its commercial profits?
- Does your museum have the freedom to decide to charge visitor admission, and set its rates?
- Does your museum have the freedom to fundraise through a separate body?
- Does your museum have control over its income and reserves?

In light of significant budget reductions, council museums have been exploring and expanding their commercial operations. Membership schemes have been established and admission fees introduced for entry, special exhibitions and events. Alongside these initiatives, fundraising has been developed through independent charitable trusts.

### Beamish Museum: unlocking enterprise potential

In 2008, Beamish Museum's visitor numbers had declined from a peak of 500,000 in 1989/90 to 297,000. It was not able to meet increased running costs and faced an operational deficit of £500,000 in 2009/10.

The museum made key operational improvements, including the introduction of a value offer, the Beamish Unlimited ticket, giving 12 months' entry for the price of a day ticket. The museum also increased the visitor offer, extended the season through investing in events and festivals, developed volunteering opportunities, and prioritised work with local communities.

By 2017, visitor numbers had more than doubled to over 670,000, making it the most visited paid-for attraction in northeast England, and turnover reached around £11 million. Beamish has created more than 200 jobs, doubled the staff, and works with around 450 volunteers providing more than 44,000 hours a year.

The flagship project in delivering on the first phase of its long-term development plan is an £18 million scheme called 'Remaking Beamish'. It is anticipated that it will create 95 new jobs, attract an additional 100,000 visitors to the region, and generate surpluses of £600,000-£900,000 per annum.

Beamish has recognised the important role of local government partners and connected with all 12 councils in the region. Local authorities have provided strategic support – for example, by advocating for investment in capital works, and through a regional stakeholder group in which the museum and councils work together on mutually beneficial agendas.

### Admission charging

Research by the Association of Independent Museums into admission charging in 2016 found that while the majority of council museums offer free admission, one in three charges. It also noted no direct link between the diversity of audiences and whether a museum charges for admission or not. However, such a finding needs to be understood in the context that the general social mix of museum visitors is not always representative of the wider social mix within their communities.

If making any changes to admissions it is especially important to communicate clearly with stakeholders and the local community about the reasons for the changes. If you do charge admission you can claim Gift Aid on the ticket price, although there are strict rules applied to its implementation.

In 2015 Brighton Museum and Art Gallery introduced charges for visitors. Brighton & Hove residents, museum members, students in full-time education in the city and all UK school children were exempt from the charge.

Janita Bagshawe, Head of Royal Pavilion and Museums noted that "the Royal Pavilion and Museums like many other museums and galleries across the country is having to rethink how it runs its services in the face of reductions in council budgets. We already generate 57 per cent of our costs through

charges and commercial activity and in addition have a successful track record in fundraising, securing funding through grants and trusts of 20 per cent.”

### **Fundraising**

The primary sources of funds for museums outside of councils are Arts Council England and the National Lottery Heritage Fund. Both organisations run a range of grant programmes which ultimately aim to open public access to museums and heritage.

Other regular funders and investors which support museums include the Wolfson Foundation, the Clore Duffield Foundation, the Esmée Fairbairn Foundation, the Paul Hamlyn Foundation and Wellcome Trust.

In addition to grant funding, museums source funds through corporate giving and sponsorship, individual giving, crowdfunding and legacies. The Art Fund hosts a free crowdfunding platform, Art Happens, which is designed specifically for museums and galleries to raise money for projects. Over 6,000 donors have raised more than £600,000 through the platform since 2014.

Fundraising for council-run museums can be challenging. Some council museums, such as Tyne & Wear Archives & Museum have established development trusts which fundraise on behalf of the museum.

The Tyne & Wear Archives & Museums Development Trust was established in December 2010. It is registered as a charity and company limited by guarantee. The Trust raises funds from individual donors, trust and foundations which support a wide variety of museum activities such as:

- exhibitions and displays
- capital improvements
- cataloguing
- acquiring objects for the collection
- conservation and restoration work
- learning programmes
- outreach projects with all sections of the community.

By supporting activities like these, the Trust is able to help Tyne & Wear Archives & Museums achieve its strategic vision of ensuring everyone has access to museum provision, and that everyone is able to use this access and value it for the significant and positive impact it makes upon their lives.

As outlined in the Association of Independent Museums’ ‘Successful Fundraising at Museums’ guide<sup>17</sup>, the key to successful fundraising is ensuring the whole organisation is ‘fundraising fit’. This means the organisation:

- has clear organisational and project aims
- can harness the potential of its people
- communicates effectively with a range of audiences
- has the systems to manage data and finances appropriately.

## **Communication and technology**

The best museums have a clear sense of purpose and can clearly communicate this externally and internally. They have their own websites rather than a page or references on the overall council website, and they have full control over social media platforms.

Museums are using digital technology in a range of ways to make their collections more accessible and to reach new audiences. Effective use of technology can create opportunities to widen the reach of collections and their stories beyond the physical building. It has the potential to engage local people who may be house-bound, have limited mobility, or in cases where travel is a barrier. The Hidden Museum at Bristol case study highlights how technology has been used by families and young people to explore museum collections.

<sup>17</sup> Association of Independent Museums, 2017, Successful Fundraising at Museums. [www.aim-museums.co.uk/wp-content/uploads/2017/03/Successful-Fundraising-at-Museums-2017.pdf](http://www.aim-museums.co.uk/wp-content/uploads/2017/03/Successful-Fundraising-at-Museums-2017.pdf)

The 2017 Digital Culture survey report published by Arts Council England and Nesta suggests that museums are lagging behind other cultural institutions in their use of digital technology. The report notes that:

“Compared to the arts and culture sector as a whole, museums are significantly less likely to regard digital as important across three out of six activity areas: marketing, operations and distribution and exhibition. The significant decline in the proportion of museums that see digital as important for distribution and exhibition has resulted in this being the area where fewest museums consider digital to be important.”<sup>18</sup>

There is more that could be done to encourage and enable museums to develop their digital capacity. The Mendoza Review states that: “one of the most significant opportunities for museums is to use technology to embrace a more inclusive and participatory approach. But digital technology is changing fast, and it requires investment in terms of time, money, skills, and the opportunity to experiment – as well as an appreciation and understanding by museums and their leaders of the benefits that digital technology can offer.”

In order for this to be effective within a council context, museums need to have certain freedoms, such as the permission and ability (including access to appropriate technology and skills) to operate their own digital presence, including by website and social media. There also needs to be a commitment from senior leadership to technology.

The LGA can offer advice, training and support for digital communications. For more details, see [www.local.gov.uk/our-support/guidance-and-resources/comms-hub-communications-support/digital-communications-0](http://www.local.gov.uk/our-support/guidance-and-resources/comms-hub-communications-support/digital-communications-0)

Key considerations for your area:

- Does your museum have full control over its communication platforms (website/social media)?
- Can your museum access all communication platforms (Facebook, Twitter, Instagram)?
- Who manages the museum’s communications? Is it in-house or through another service?

### **The Hidden Museum project in Bristol Museum and Art Gallery: an innovative digital experience**

In 2016 Bristol Museum and Art Gallery developed the Hidden Museum project in collaboration with the University of Bristol and Aardman Animations. It was funded by Nesta and Arts Council England’s Digital Research and Development Fund for the Arts. The aim of the project was to make family and group visits to Bristol museums more playful and fun.

The project centred on the development of a game played on hand-held devices which encouraged visitors to explore the collections of Bristol Museum and Art Gallery. The game used over 120 iBeacons (Bluetooth devices) placed around the museum to navigate small groups around the building, encouraging them to discover new objects.

Upon completing each game the user was rewarded with secret information from the museum’s archive or curator stories about objects on display, revealing information about museum artefacts which are not usually available to the general public. The app also provided the museum with insight into user’s behaviour by tracking movement around the museum and statistics on how the app is used.

The headline finding from the research was that the majority of the groups who used the Hidden Museum application visited parts of the museum that they had not been to before or would not normally have chosen to.

<sup>18</sup> Arts Council England and Nesta, 2017, Digital Culture 2017. [www.nesta.org.uk/report/digital-culture-2017/](http://www.nesta.org.uk/report/digital-culture-2017/)



In addition, many users commented that it was a fun and effective way to explore the museum. The research results also highlighted the range of other impacts the application had on visitor behaviour, as well as potential tensions that surface when digital technology is integrated into museums.

## Brokering partnerships

The Mendoza Review recognises the potential for councils to broker partnerships between museums and businesses, schools and universities, health providers, local enterprise partnerships (LEPs), tourism businesses and other cultural providers.

As a councillor, you are best-placed to make the connections and open doors which will enable your museums to reach their potential

while addressing local strategic needs. You can identify initiatives which museums are well-placed to respond to, such as the Future High Streets Fund. At the time of writing, the Future High Streets Fund is an initiative being led by the Ministry of Housing, Communities and Local Government to provide co-funding towards capital projects that aim to change the face of high streets. £55 million of the Fund has been allocated to the Department for Digital, Culture, Media and Sport to support the regeneration of heritage high streets.

There will be many other ways in which you can broker effective partnerships for museums. The table below outlines some of these. The case study from the Black Country Living Museum highlights the potential economic impact of a partnership between a museum and a LEP.

Museum activity	Potential partner	Possible link activities
Learning and engagement	Schools, universities, education providers, pre-schools, special educational needs and disabilities networks	Curriculum-related workshops, research agendas, continuing professional development for teachers and researchers
Enterprise	LEPs, local businesses, trade organisations, housing and planning leads	Local business breakfast meetings, high street or area developments
Health and wellbeing	Clinical commissioning groups, local health charities	Arts on prescription
Tourism	Hotels, tourism groups, other tourist attractions, transport leads	Marketing, joint ticketing
Other cultural providers	Theatre, dance and arts centres, arts groups	Cultural strategy, events, workshops



## Black Country Living Museum: working with local enterprise to expand

Black Country Living Museum (BCLM) is an open-air museum located in Dudley in the West Midlands. It has been an independent organisation since 1976. It was initially set up in 1966 by Dudley Council as a section within its museum department. BCLM is a National Portfolio Organisation of Arts Council England 2018-2022.

BCLM: Forging Ahead is phase one of the museum's masterplan of site development (2018-2022). It will see the Museum expand by a third, transforming the site with a new major historic development focused on the period 1940s-1960s and improved visitor facilities. It will use real things, real people and real stories to engage and inspire visitors of all ages to learn about the Black Country's heritage, its impact on the world and its relevance today. Through this ambitious project, the museum's vision is to create a world-class heritage attraction at the heart of the Black Country, telling a unique story of worldwide significance to 500,000 visitors per year and creating over 140 jobs in the local area.

The museum team has been working closely with the Black Country LEP through the development of this project; one of the supporting bodies for the £23.7 million project, alongside National Lottery Heritage Fund and Arts Council England.

Ninder Johal, Board Member of the Black Country LEP, says: "This is fantastic news for the Black Country region and for our visitor economy. The Black Country LEP is working hard with partners to ensure the infrastructure is in place to support world-class attractions such as the Black Country Living Museum in expanding its visitor experience to increase opportunities for sharing the unique and successful story of the Black Country and its significance world-wide across a range of sectors.

"Turning the museum's face to Castle Hill and creating a Tourism Hub including Dudley's four attractions (Black Country Living Museum, Dudley Zoological Gardens, Dudley Canal Trust and Dudley Archives and Local History Centre), is real progress for the area, and it will support the Black Country LEP in delivering key elements of our economic plan including creating new employment, apprenticeships and volunteer opportunities for local people."



Toddler takeover sessions at Tyne & Wear Archives & Museums help to engage new audiences (see page 33)

## Evidencing impact and championing museums

Museums must respond to the needs of their communities and demonstrate how they are doing this. From Taking Part data we know that in 2017/18:

- 72.8 per cent of adults visited a heritage site in the last 12 months
- 50 per cent of adults visited a museum
- families and cultural tourists are key visitors to museums.<sup>19</sup>

We also know from research undertaken by the Audience Agency that:

- council-run museums attract the most loyal and regular audiences
- 40 per cent of council museum visitors attend several times a year
- council museums attract the highest proportion of family audiences
- 65 per cent of council museum visitors live within a 30-minute drive, compared to 40 per cent of university museums and 33 per cent of independents.<sup>20</sup>

However, there is still more work to do. The Taking Part Survey: England Adult Report 2017/18 notes that people who identified as black, Asian and minority ethnic (BAME) were significantly less likely to have visited a museum or gallery than people who identified as white. It also notes that engagement with museums and galleries was significantly higher for the upper socio-economic group than the lower.

Museums will have many ways of capturing and disseminating data about their visitors and the impact of the work they are undertaking. You can help museums by signposting them to any recent local data surveys which they can use.

As a councillor, it is your role to champion innovative and engaging work in museums.

You can challenge stereotypes to encourage your colleagues to see museums as more than buildings and collections. In conjunction with communications teams, you can support your museums to raise awareness of their work and encourage wider participation.

### **Tullie House Museum and Art Gallery Carlisle and Imperial Decree Museum, Xuzhou: collaboration to raise international profile**

Tullie House Museum and Art Gallery has been working in collaboration with the Imperial Decree Museum in Xuzhou, China since 2013. Originally the project aimed to showcase the outstanding collections from the Han Dynasty alongside Tullie's nationally important Roman collections, and this has since been extended to beyond the Han and Roman period.

A collaborative exhibition is planned for January 2020 at Tullie House. The exhibition will be the first time an independent museum has exported collections to the UK. The Chinese Government has said that this is ground-breaking and will set a precedent for others to follow.

Now in its sixth year, the main impacts of the partnership have been a greater understanding of museum management, including for loans abroad, and dealing with dignitaries and protocol. It has offered opportunities to borrow internationally important collections that have never been seen outside of China. The project has increased the status of both museums on the international stage. In 2015 the Tullie team visited China, where they organised handling sessions at three venues, gained national media attention, and generated huge interest from regional museums.

<sup>19</sup> DCMS et al, 2018, Taking Part Survey: England Adult Report 2017/18. [www.gov.uk/government/statistics/taking-part-201718-quarter-4-statistical-release](http://www.gov.uk/government/statistics/taking-part-201718-quarter-4-statistical-release)

<sup>20</sup> The Audience Agency, 2018, Museums Audience Report. [www.theaudienceagency.org/insight/museums-audience-report](http://www.theaudienceagency.org/insight/museums-audience-report)

Tullie House now has another partnership with Tang West Museum in Xi'an, and is considering working with the Cultural Administration of Henan Province following reciprocal visits in 2017. Tullie House is also a partner in the Wall to Wall initiative that involves the two World Heritage sites (the Great Wall and Hadrian's Wall) collaborating on conservation, research and interpretation.

There are two Chinese members of staff at Tullie House (externally funded) who are supporting the development and delivery of an engagement programme. The museum is also in the process of helping Carlisle City Council create a twinning project with the city of Maotai, following a visit in December 2018.



Tullie House collaborate with the Imperial Decree Museum to take their collections to global audiences



# Choosing the right operating model

There is no single preferable model for operating museums. There are examples of thriving museums within independent trusts, shared services and council ownership. Deciding to embark on a new model of operation requires time, financial investment and consideration of a wide range of factors. It is not a means of addressing immediate funding challenges.

This guide highlights some of the existing guidance and key considerations for councillors who may be considering alternative approaches for delivery. It is not intended to be a how-to guide. There is existing guidance which details the process of exploring trust options and, while some of the key documents were written some time ago, the outlined process remains relevant.

Key guidance documents include:

- Moving to Museum Trusts, Egeria. Published by the Museums, Libraries & Archives Council, 2006.
- An opportunity for change: Exploring the trust option for museum services, Lawrence Graham LLP. Published by Renaissance Yorkshire, 2008.
- Successfully Taking Over Your Local Museum: A guide to community asset transfer of Museums, Bethany Rex. Published by the Association of Independent Museums, 2018.

Norfolk Museums Service has found an effective way of working while remaining within the council.



Norfolk Museums Service allows conservation expertise to be shared across museum sites

## Norfolk Museums Service: service-sharing across the county

Norfolk Museums Service (NMS) was established in 1974 when the county council and seven district councils in Norfolk agreed to delegate their museum powers to a joint committee.

The service is made up of 10 museum sites across Norfolk, the Norwich Castle Study Centre, and a collections centre based at Gressenhall. Through operating as a joint service, NMS is able to provide central expertise in conservation, design, technical and collections management matters to its sites.

The county-wide nature of the service provides an additional benefit to visitors through the Norfolk Museums Pass, which allows pass holders unlimited access to NMS sites for 12 months from purchase.

Working alongside NMS is the Norfolk Museums Development Foundation (NMDF). This independent charity was established in 2014 with the purpose of supporting NMS to secure funding for the care and development of its collections and buildings, as well as a wide range of activities for public benefit, including extensive formal and informal learning programmes, skills development and volunteering opportunities, public exhibitions and events.

The charity complements the work of NMS, with trustees using their wide range of skills and expertise to provide guidance and advice to museum staff. The trustees also help to develop important links with a range of external organisations.

NMDF is a registered company limited by guarantee and is registered with the Charity Commission. It is also a National Portfolio Organisation of Arts Council England.

## Operating models

There is a range of alternative ways in which a museum service can be delivered outside of a traditional council framework. Each delivery option has pros and cons and any proposed change takes considerable time. It also requires a robust options appraisal and business case.

Throughout a process of appraisal, councillors should be questioning and challenging the changes proposed and options presented. The considered delivery models should ultimately align with the needs of the community and local priorities.

In 2017, the Department for Digital Culture Media and Sport (DCMS) produced guidance on alternative delivery models. While it was specifically designed with library services in mind, it includes useful guidance which applies across service areas, including an outline of the alternative delivery models:

- Local Authority Trading Company (commonly referred to as a LATC)
- Public Service Mutual (commonly referred to as a PSM or mutual)
- Outsourcing to an existing social enterprise or charity, or to a for-profit provider
- Joint venture (JV). Potentially involving ownership and control by a range of stakeholders, including (but not limited to) staff, the council, or independent provider(s).

A further delivery model exists for library services of remaining in-house with re-engineering.

The table (right) summarises the characteristics of each of the five options.

For further details on these options please refer to the DCMS guidance.<sup>21</sup>

<sup>21</sup> DCMS, 2017, Libraries: alternative delivery models toolkit. [www.gov.uk/government/publications/libraries-alternative-delivery-models-toolkit](http://www.gov.uk/government/publications/libraries-alternative-delivery-models-toolkit)



Delivery model	Ownership	Governance	Services
Local Authority Trading Company (sometimes referred to as a Wholly Owned Company)	100 per cent parent council(s)	Can be designed for flexibility/autonomy. Requires a council-appointed board. Service Level Agreement (SLA)/ contract with parent council(s) – control test	Flexible, but the majority of services delivered on behalf of parent council(s) – function test
Public Service Mutual (PSM)	Variety of options: council and staff, staff and community, 100 per cent staff	Can be designed as required. Board membership dependent upon ownership. SLA/ contract with council(s). Well positioned to promote co-production	Flexible – can deliver services to councils, private or voluntary and community sector customers
Outsource to existing social enterprise, third sector or private provider	100 per cent third party provider	Arranged via contract. Well positioned to promote co-production	Contracted services delivered on behalf of council(s)
Joint venture	Potential for joint ownership, including staff, council(s) and/ or third party provider	Can be designed as required. SLA/ contracts as required. Well positioned to promote co-production	Flexible – can be delivered to council(s) and private/voluntary and community sector customers

Once different models have been considered, the council may decide to keep the museum in-house. In this instance, you should still explore ways in which the museum can improve efficiency and effectiveness, and identify barriers to progress which may exist within the council. This may include freedom of website use, the establishment of a fundraising trust and clarity on internal costs.

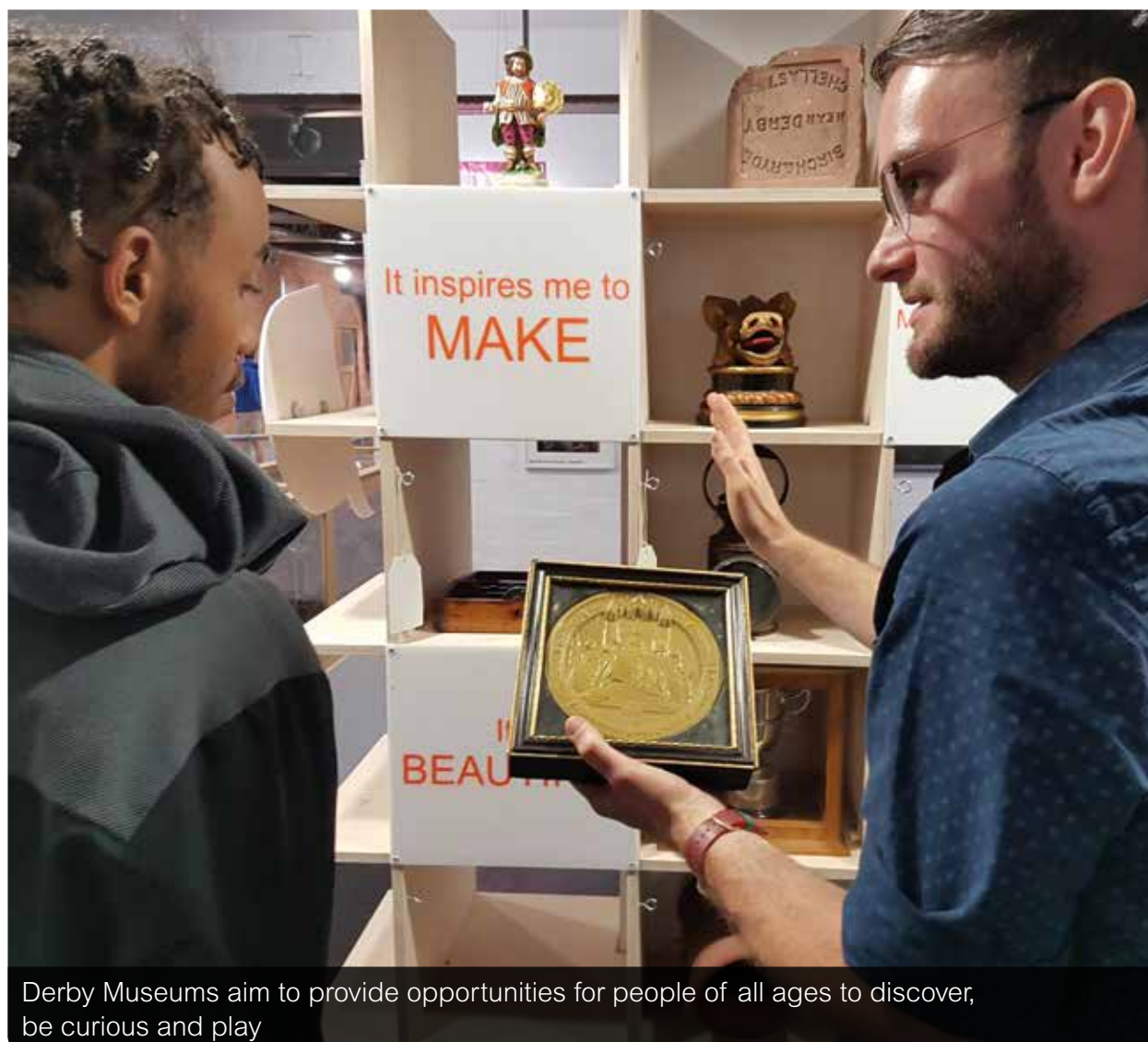
## Independent trusts

Since 2004, there has been an increase in the number of council museums moving to independent trusts by setting up new charitable trusts. In 2017, there were 64 council museum trusts in England but prior to 2004, there were only six.

To truly gain the benefits of an independent trust the organisation needs to be set up in a careful and considered fashion, drawing on existing good practice. It needs to have the right level of independence and funding. If this doesn't happen the council may have to resume control of the trust in the future.

The more independent the trust is from the council, the greater the opportunity it has to be entrepreneurial. If museum staff continue to be restricted in areas such as council control over communications, forward planning and budgeting, it will hinder their ability to succeed. However, it is worth noting that the new trust is at great risk of failure without the commitment of ongoing financial support from the council.

Advantages	Disadvantages
Starting a new trust from scratch – can allow the museum or cultural trust to review, and be clearer about, its purpose/objectives	Loss of council back-office support (legal/HR/finance). This may increase costs for these services
Freedom to raise income and fundraise independently (people may be more willing to give money to the trust than a council)	Museum under no obligation to respond to local agendas and becomes at risk of becoming removed from council priorities
May create greater awareness of full costs and give staff capacity to manage finances more efficiently	Increased pressure on museum to source alternative funds (which may not be viable)
Focused on delivering the vision and mission of the museum (not the local authority)	Challenge of fundraising with larger funders (eg ability to offer match/support in-kind)
Ability to claim Gift Aid	VAT liabilities may apply
Possibility of negotiating business rates relief (business rates are not charged when inside the council, but a trust could be liable)	Set-up costs can be extensive



## Derby Museums: moving to a successful trust model

Derby Museums is a limited company and independent charitable trust. It was formed in 2012 when the Museums Service of Derby City Council was moved to trust status. It is a National Portfolio Organisation of Arts Council England. The Board of Trustees (which includes three council members) provides rigorous oversight ensuring the museum trust works to its charitable objectives and business plan.

The trust holds a 30-year lease on the buildings under its care and manages collections under a funding agreement with the City Council. Ownership of the collections is retained by the City Council. The organisation manages three sites: Derby Museum and Art Gallery, The Silk Mill and Pickford's House Museum, as well as their associated collections. It has a particular specialism in work by or relating to artist Joseph Wright of Derby, and has been designated a collection of outstanding national significance by Arts Council England.

Derby Museums is midway through the redevelopment of Derby Silk Mill to create the UK's first Museum of Making. The Silk Mill stands on the site of the world's first factory and is part of the UNESCO World Heritage Site. This £16.7 million development is supported by the National Lottery Heritage Fund, Arts Council England and Derby City Council. It is set to open in Autumn 2020. The museum will be a place which inspires the creators and makers of the future.

Derby Museums sets its own vision and objectives. They are not restricted in their use of social media and they have successfully claimed Museums and Galleries Exhibition Tax Relief. They have also had success in attracting investment for capital funding for the Museum of Making. This follows two unsuccessful bids when the museum was part of the council.

Since 2014, investment from Derby City Council and Arts Council England has reduced by some 40 per cent. In light of this, the Trust has significantly improved its ability to generate its own funds through commercial activities, fundraising and awards from trusts and foundations. As a result, the ratio of earned income to turnover has increased from 3 per cent in 2013/14 to 29 per cent in 2017/18.

As an independent organisation, the council view the museums as an active partner. Tony Butler, Executive Director of Derby Museums Trust said: "as Executive Director I meet monthly with the Council's CEO/Deputy CEO and senior councillors. I also sit on a number of Derby's leadership groups. We participate in city-wide programmes addressing the local authority's strategic priorities around young people and economic development. Since we became a trust we've become more civic-minded and useful to our city."

All the evidence suggests that security of tenure over a museum's buildings and physical assets is critical to the long-term financial sustainability of a new trust. While not a guarantee of success, a trust with a long-term lease, at realistic rents, will stand a much greater chance of survival than one on a short-term lease that is constantly being renewed. Funders will have much more confidence in making long-term investments in a trust if the council has demonstrated an equal long-term commitment to the approach.

Luton Culture has been a charitable trust for 10 years. Karen Perkins, Director of Culture and Engagement notes:

"At the outset, Luton Culture had a three-year funding and leasing agreement with Luton Borough Council. This left the trust in a vulnerable position and made it very difficult to fundraise from external sources. It has taken ten years for Luton Culture to be in a secure financial position and the length of leases played a big part in this. Luton Culture now has long leases on most of its buildings. Having security of tenure allows us to be more financially sustainable and innovative.

We can use this to leverage external funds and to secure financial support to re-invest into our work.”

Another consideration in moving to a trust is the balance of workforce skills. New appointments may be needed to fill any gaps left by the council which may be an opportunity to bring in new skills and experience to the museum. There will also be employees who TUPE (Transfer of Undertakings Regulations 2006) over to a new trust and they will need support in finding their role in a new context.

PwC have noted that in their experience of supporting new trusts “there is a risk that transferring staff from the local authority to the new trust and directly employing new staff, can result in two tiers of staff – in turn potentially generating resentment among the workforce. Again, it’s vital to anticipate and avoid such risks.”<sup>22</sup>

Full consideration also needs to be given to the pension liabilities for any transferred staff, and the impact this might have on the viability of the new trust’s business plan.

Potential benefits of moving to trust status include the ability to bring in new skills and perspectives to not only make the museum more sustainable, but also more enterprising and visitor-orientated.

In summary, moving your museums to an independent trust status may, in the long-term, be of benefit to the sustainability of the collections and buildings. It may be a way to ensure they are there to be enjoyed by future generations. However, this is only the case if the process has been considered carefully and all opportunities and pitfalls identified early on in the process.

Key questions to consider when exploring a trust option:

To what extent will the trust have legal ownership of their assets (buildings, collection)?

- How will pension responsibilities for transferred staff be handled?
- What will the relationship between the new trust and the council be? Has this been articulated or recorded?
- How might the terms of a lease impact the trust’s ability to apply for other funds?
- How will a trust maintain a connection with cultural strategies, LEPs and council partners?
- What do the communities you represent want and need from the museum in the here and now, and will moving to a trust enable this?

## Charity trustees

If a decision has been made to establish an independent trust then a board of trustees will need to be recruited. There should be a diverse mix of individuals on the board and the council should not have a majority representation. Many councils set up a shadow board during the transition period.

The council still retains overall responsibility during this period. Following the transition period, agreements can be adopted between the trust and the council based on what is deemed reasonable. There should always be a ‘fall back’ in the event of it not being successful.

Charity trustees have ultimate responsibility for directing the affairs of a charity and ensuring that it is solvent and well-run. Trustees have a duty to act solely in the interests of the charity and its beneficiaries. The Charity Governance Code<sup>23</sup> notes all trustees should be:

- committed to their charity’s cause and have joined its board because they want to help the charity deliver its purposes most effectively for public benefit
- recognise that meeting their charity’s stated public benefit is an ongoing requirement

<sup>22</sup> PwC, 2017, The time has come to transfer local authority museums to trust status. [https://pwc.blogs.com/industry\\_perspectives/hospitality-and-leisure](https://pwc.blogs.com/industry_perspectives/hospitality-and-leisure)

<sup>23</sup> Charity Governance Code Steering Group, Charity Governance Code. [www.charitygovernancecode.org/en](http://www.charitygovernancecode.org/en)



- understand their roles and legal responsibilities, and, in particular, have read and understood the Charity Commission's 'The essential trustee' guidance and their charity's governing document
- committed to good governance and want to contribute to their charity's continued improvement.

## The council as a charity trustee

A corporate body such as a council can also be a charity trustee. Councils are empowered by Section 139 of the Local Government Act 1972 to receive and hold gifts on charitable trusts. This may include money or assets left by donors or charitable trusts created by ancient royal charters or Acts of Parliament.

As outlined above, a trustee needs to act in the best interests of the trust, not that of the council. While there are many shared principles (eg transparency, accountability) which apply equally to councils and charitable trusts, there are also differences. It is imperative that these differences are understood if council trustees are to perform this role effectively and with minimum risk. The Charity Commission has produced a guide on the council as a charity trustee<sup>24</sup> and it includes the following principles:

- For a body to be a charity, it must be independent, ie it must exist and operate solely for charitable purposes, not as a means of carrying out the policies or directions of the local authority.
- Where a local authority is a trustee of a charity, it is the corporate body, acting in accordance with its usual procedures, which is the trustee. While ongoing management may be delegated to officers, responsibility for decision-making and oversight rests with the councillors.
- The terms of the charity must be clearly understood. Nearly all problems that occur stem from a lack of clarity regarding these terms, or indeed failing to recognise that a charity exists in the first place. If there is any doubt about the terms of a charity or how they should be interpreted, appropriate advice should be sought, for example from legal advisors or from the Commission.
- The management of the charity should be kept separate, as far as possible, from the business of the local authority. Depending on the size and circumstances of the charity, it may make sense for a committee of councillors to be allocated this task. It must not be forgotten, however, that responsibility continues to rest with the whole council.
- Equally, the finances of the trust must be kept separate from those of the council. The assets must be accounted for separately and income and expenditure should be channelled through discrete cost centres. The local authority may top up the finances of the trust but no funds should pass from the trust into the council's own accounts – although the council may, depending on the circumstances, recover the costs of administration.
- If the original terms of the charity can no longer be realistically followed because circumstances have changed, the local authority should approach the Commission to see if the charity's governing document can be amended or updated. The Commission can advise on the most appropriate way of doing this.
- The Commission's registration and reporting requirements must be observed. For example, all charities must produce annual statements of accounts under charity law. Depending on the financial size of the charity, it may have to register with the Commission or be subject to higher levels of accounting scrutiny.

<sup>24</sup> The Charity Commission, 2013, Local authorities as charity trustees. [www.gov.uk/government/publications/local-authorities-as-charity-trustees](http://www.gov.uk/government/publications/local-authorities-as-charity-trustees)

- If any issues arise about whether the terms of the trust have been properly followed, the local authority should contact the Commission and work with it to find a solution.

## Shared services

Around 45 councils across England share a chief executive and senior management team in about 20 different partnerships. Most also share at least some services.<sup>25</sup> In the context of museums, this may include museums and other cultural providers (including libraries) sharing:

- storage
- curatorial expertise
- back-office functions
- education and learning expertise
- space with other service providers (such as a tourist information office, library or archive).

Once joint senior management is in place, sharing often filters down. There are museums that have been operating shared services for quite some time. For example, Tyne & Wear Archives & Museums has been managing nine museums and galleries across five local authorities since the abolition of the Tyne and Wear Metropolitan County Council in 1986.

### Tyne & Wear Archives & Museums: smart trading in Tyneside

Tyne & Wear Archives & Museums (TWAM) is a joint service of the four local authorities on Tyneside: Newcastle (which acts as the lead authority and legal body), South Tyneside, North Tyneside and Gateshead. It receives additional support and contributions from Arts Council England. TWAM has separate agreements with Sunderland City Council to manage its archives and with Newcastle University to manage the Great North Museum: Hancock.

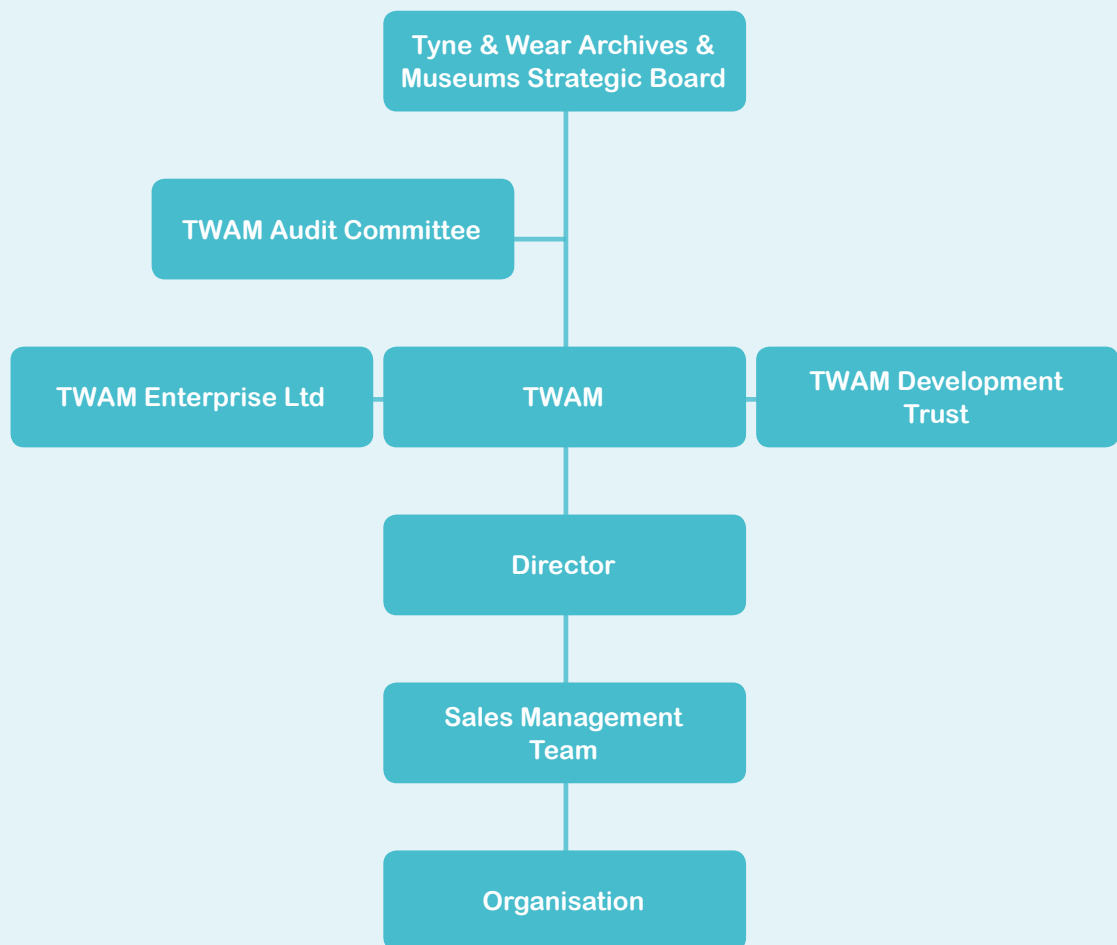
TWAM manages a collection of nine museums and galleries across Tyneside and the archives for Tyne and Wear. They also share the use of the Regional Museums Store at Beamish Museum. TWAM has been administered by a joint board of local authorities since the abolition of the Tyne and Wear Metropolitan County Council in 1986.

TWAM is also supported by the Tyne & Wear Archives & Museums Development Trust, which was established on 1 December 2010 to raise funds from individual donors, trusts and foundations to support a wide variety of archives and museum activities. Over the years more than £1.5 million has been raised from charitable sources for a wide range of museum activities.

A Trading Company, TWAM Enterprises Ltd was established in May 2018 following a major review of TWAM's governance structures. Its purpose is to allow TWAM to capitalise on in-house commercial expertise by assuming responsibility for activity previously delivered through TWAM's trading team. This includes retail operation, venue hire and catering. TWAM Enterprises Ltd will donate/Gift Aid its profit to TWAM Development Trust to further TWAM's charitable objectives.

<sup>25</sup> LGA, 2016, Stronger together: shared management in local government. [www.local.gov.uk/stronger-together-shared-management-local-government](http://www.local.gov.uk/stronger-together-shared-management-local-government)

The company limited by shares is wholly owned by the five partners: Gateshead Council, Newcastle City Council, North Tyneside Council, South Tyneside Council and the University of Newcastle. The diagram below highlights the operating structure:



Any council pursuing an alternative delivery model for its museums will need to ensure there is a strong framework which outlines how the council will discharge its functions. It must be clear what elements the council will continue to provide and what its expectations are for the new delivery body. A key part of this will be clarity on the roles of staff and volunteers, noting that it will not always be possible to run museums with more volunteers.

In conclusion, take advice from your museum head of service, take time to consider options carefully with your residents, and consider how a new model of operation meets the needs of your communities.

# Further support

## Local Government Association

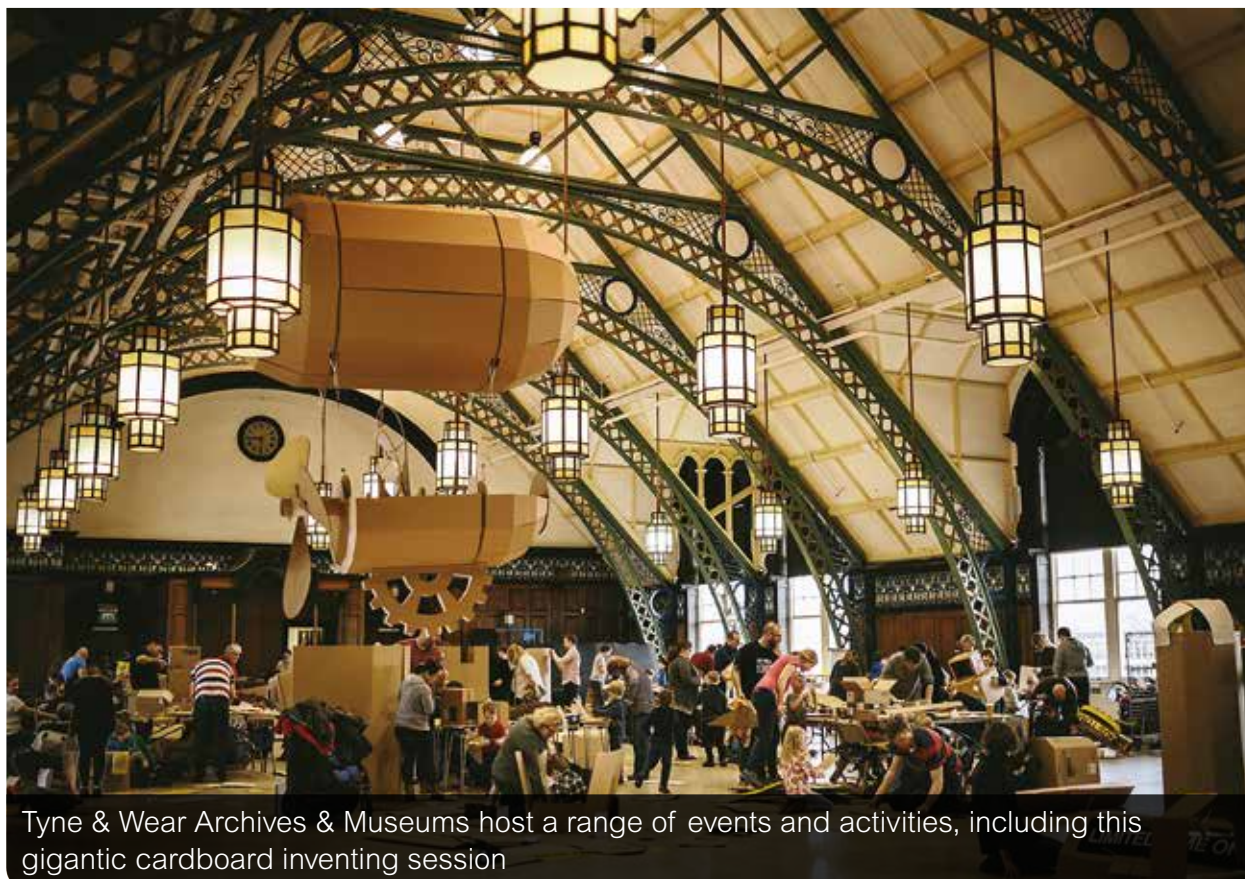
You can keep up to date with the LGA's work by signing up to our monthly culture, tourism and sport e-bulletin: [www.local.gov.uk/about/news/e-bulletins](http://www.local.gov.uk/about/news/e-bulletins).

The LGA improvement offer for culture, tourism and sport can be found at: [www.local.gov.uk/our-support/our-improvement-offer/culture-and-sport-improvement](http://www.local.gov.uk/our-support/our-improvement-offer/culture-and-sport-improvement)

This includes free leadership essentials training for portfolio holders with responsibility for culture or related areas introducing members to the latest developments in

cultural provision, including new sources of funding. You will have a chance to interact with senior Arts Council England and LGA representatives, hear from areas with good practice, and network with colleagues across the country.

Our improvement offer also includes peer challenges, which look at key issues for the service or area identified by the council. Peer challenge is not an inspection, it is a tool for improvement, and is carried out to your specification aimed at improving, not judging, your council. A peer challenge provides you with free expert, neutral advice from a team comprising a peer challenge manager, an elected member and a head of service or



Tyne & Wear Archives & Museums host a range of events and activities, including this gigantic cardboard inventing session



equivalent. They will meet with councillors and the senior management team, key partners and staff to provide a constructive analysis of the service and your plans for it, identifying any opportunities for further improvement or innovation.

Policy updates, consultation responses, and research can be found at: [www.local.gov.uk/topics/culture-tourism-leisure-and-sport](http://www.local.gov.uk/topics/culture-tourism-leisure-and-sport)

Case studies can be found at: [www.local.gov.uk/topics/culture-tourism-leisure-and-sport/good-practice-culture](http://www.local.gov.uk/topics/culture-tourism-leisure-and-sport/good-practice-culture)

We encourage cultural portfolio holders and managers to also consider the LGA's wider support programme ([www.local.gov.uk/our-support](http://www.local.gov.uk/our-support)). For instance, Tullie House and Carlisle City Council made use of the Productivity Experts programme to improve the museum's business case and close a funding gap of £200,000<sup>26</sup>.

For more information please email: [cts@local.gov.uk](mailto:cts@local.gov.uk).

## Arts Council England

Museums can also apply to a range of funding streams such as the National Lottery Project Grants. For more information, see: [www.artscouncil.org.uk/projectgrants](http://www.artscouncil.org.uk/projectgrants).

Arts Council England is the national development agency for museums in England. We champion, develop and invest public money from the government and National Lottery to help develop museums. Our website contains a wealth of information and resources about the impact of museums, as well as our support offer and guidance materials: [www.artscouncil.org.uk](http://www.artscouncil.org.uk)

We manage a national portfolio of 57 museum organisations which receive regular funding, representing over 200 museums. Further details about Arts Council England's Museums Narrative can be found online: [www.artscouncil.org.uk/sites/default/files/download-file/Museums.pdf](http://www.artscouncil.org.uk/sites/default/files/download-file/Museums.pdf)

<sup>26</sup> LGA, 2018, Tullie House Museum – future sustainability. [www.local.gov.uk/tullie-house-museum-future-sustainability](http://www.local.gov.uk/tullie-house-museum-future-sustainability)

The Accreditation scheme is managed by Arts Council England, on behalf of a UK-wide Accreditation partnership (see page 17). We also manage the Designation scheme which recognises significant collections of national and international importance: [www.artscouncil.org.uk/supporting-collections-and-archives/designation-scheme](http://www.artscouncil.org.uk/supporting-collections-and-archives/designation-scheme)

We fund and support a network of Museum Development across England. Museum Development is delivered by nine regional providers. Each provider offers tailored training, grants programmes and networks. For further information see here: [www.museumdevelopmentnetwork.org/](http://www.museumdevelopmentnetwork.org/)

You can keep up to date with Arts Council England's work by signing up the monthly newsletter at: [www.artscouncil.org.uk/our-organisation/sign-our-email-updates](http://www.artscouncil.org.uk/our-organisation/sign-our-email-updates)

## Other support

National Lottery Heritage Fund is the largest dedicated funder of heritage in the UK. They distribute National Lottery grants from £3,000 to £5 million, funding projects that sustain and transform the UK's heritage: [www.heritagefund.org.uk/](http://www.heritagefund.org.uk/)

The Museums Association is the professional body for people working in museums across the UK: [www.museumsassociation.org/home](http://www.museumsassociation.org/home)

The Association of Independent Museums (AIM) is a membership network which provides resources: [www.aim-museums.co.uk](http://www.aim-museums.co.uk)

# Additional resources

## Strategic direction

The Mendoza Review: an independent review of museums in England, 2017, DCMS. [www.gov.uk/government/publications/the-mendoza-review-an-independent-review-of-museums-in-england](http://www.gov.uk/government/publications/the-mendoza-review-an-independent-review-of-museums-in-england)

Museums Action Plan, 2019, DCMS. [www.gov.uk/government/publications/museums-action-plan-2018](http://www.gov.uk/government/publications/museums-action-plan-2018)

Connected Growth, 2019, DCMS. [www.gov.uk/government/publications/connected-growth](http://www.gov.uk/government/publications/connected-growth)

The Future of Civic Museums: a think piece, 2018, English Civic Museums Network. [www.nationalmuseums.org.uk/media/documents/publications/civic\\_museums\\_think\\_piece.pdf](http://www.nationalmuseums.org.uk/media/documents/publications/civic_museums_think_piece.pdf)

## Standards

Museums Accreditation Scheme, updated 2018, Arts Council England. [www.artscouncil.org.uk/supporting-arts-museums-and-libraries/museums-accreditation-scheme](http://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/museums-accreditation-scheme)

Code of Ethics for Museums, updated 2015, Museums Association. [www.museumsassociation.org/download?id=1155827](http://www.museumsassociation.org/download?id=1155827)

## Income generation

Successful Fundraising at Museums, 2013, Association of Independent Museums. [www.aim-museums.co.uk/wp-content/uploads/2017/03/Successful-Fundraising-at-Museums-2017.pdf](http://www.aim-museums.co.uk/wp-content/uploads/2017/03/Successful-Fundraising-at-Museums-2017.pdf)

Economic Value of the Independent Museum Sector: Toolkit, 2014, Association of Independent Museums. [www.aim-museums.co.uk/wp-content/uploads/2017/02/AIM-Economic-Impact-Toolkit-2014.pdf](http://www.aim-museums.co.uk/wp-content/uploads/2017/02/AIM-Economic-Impact-Toolkit-2014.pdf)

A Practical Guide to Lawful Fundraising for Arts and Cultural Organisations, 2018, Arts Council England et al. [www.artscouncil.org.uk/sites/default/files/download-file/A%20Practical%20Guide%20to%20Lawful%20Fundraising%20May%202018%20Update%2023%20MAY%202018.PDF](http://www.artscouncil.org.uk/sites/default/files/download-file/A%20Practical%20Guide%20to%20Lawful%20Fundraising%20May%202018%20Update%2023%20MAY%202018.PDF)

The Economic Impact of Museums in England, 2015, tbr. [www.artscouncil.org.uk/sites/default/files/download-file/Economic\\_Impact\\_of\\_Museums\\_in\\_England\\_report.pdf](http://www.artscouncil.org.uk/sites/default/files/download-file/Economic_Impact_of_Museums_in_England_report.pdf)

## Health and wellbeing

National Alliance for Museums, Health and Wellbeing: this website hosts a range of resources including links to measurement and evaluation toolkits [www.museumsandwellbeingalliance.wordpress.com/](http://www.museumsandwellbeingalliance.wordpress.com/)

## Digital

A framework for your digital marketing strategy, 2009, Culture Hive. [www.culturehive.co.uk/resources/a-framework-for-your-digital-marketing-strategy/](http://www.culturehive.co.uk/resources/a-framework-for-your-digital-marketing-strategy/)

Digital isn't Different online resources, Collections Trust. [www.collectionstrust.org.uk/digital-isnt-different/](http://www.collectionstrust.org.uk/digital-isnt-different/)

Museum Practice: technology and digital online resources, Museums Association [www.museumsassociation.org/museum-practice/technology-and-digital](http://www.museumsassociation.org/museum-practice/technology-and-digital)

## Audiences

Museums Audience Report, 2018, The Audience Agency [www.theaudienceagency.org/asset/1707](http://www.theaudienceagency.org/asset/1707)

Visitor Verdict insights, Association of Independent Museums. [www.aim-museums.co.uk/for-aim-members/visitor-verdict/](http://www.aim-museums.co.uk/for-aim-members/visitor-verdict/)

## **Advocacy and impact**

Museums Matter, 2015, National Museums Directors Council. [www.nationalmuseums.org.uk/media/documents/publications/museums\\_matter/museums\\_matter\\_web.pdf](http://www.nationalmuseums.org.uk/media/documents/publications/museums_matter/museums_matter_web.pdf)

A Wealth of Treasures, 2016, British Council and National Museums Directors Council. [www.nationalmuseums.org.uk/media/documents/a\\_wealth\\_of\\_treasures\\_24pp\\_july\\_2016\\_web.pdf](http://www.nationalmuseums.org.uk/media/documents/a_wealth_of_treasures_24pp_july_2016_web.pdf)

Museums Change Lives, 2017, Museums Association. [www.museumsassociation.org/download?id=1218885](http://www.museumsassociation.org/download?id=1218885)

## **Governance and management**

Successfully Taking Over Your Local Museum: A Guide to Community Asset Transfer, 2018, Association of Independent Museums. [www.aim-museums.co.uk/wp-content/uploads/2018/09/V-5-Successfully-Taking-Over-Your-Local-Museum-2018-6.pdf](http://www.aim-museums.co.uk/wp-content/uploads/2018/09/V-5-Successfully-Taking-Over-Your-Local-Museum-2018-6.pdf)

Successfully Setting Up A New Museum, 2014, Association of Independent Museums. [www.aim-museums.co.uk/wp-content/uploads/2017/03/Successfully-Setting-up-a-New-Museum-2017.pdf](http://www.aim-museums.co.uk/wp-content/uploads/2017/03/Successfully-Setting-up-a-New-Museum-2017.pdf)

Successful Governance in Independent Museums, 2018, Association of Independent Museums. [www.aim-museums.co.uk/wp-content/uploads/2018/03/Successful-Governance-In-Independent-Museums.pdf](http://www.aim-museums.co.uk/wp-content/uploads/2018/03/Successful-Governance-In-Independent-Museums.pdf)

Moving to Museum Trusts, 2006, Egeria/Museums, Libraries & Archives Council.

An opportunity for change: Exploring the trust option for museum services, 2008, Lawrence Graham LLP. [https://webarchive.nationalarchives.gov.uk/20110805151500/http://www.mla.gov.uk/what/support/toolkits/~media/Files/pdf/2010/programmes/Feasibility\\_framework\\_for\\_developing\\_trust\\_options\\_for\\_museum\\_services](https://webarchive.nationalarchives.gov.uk/20110805151500/http://www.mla.gov.uk/what/support/toolkits/~/media/Files/pdf/2010/programmes/Feasibility_framework_for_developing_trust_options_for_museum_services)

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