

Establishing a New Museum or Gallery



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1. Welcome

There are so many different ways to share the history and heritage of our communities, industries and places. This Toolkit is designed to help you through the process of setting up a new museum or gallery.

Museums Galleries Scotland and its predecessor organisations have a tradition of supporting the development of new museums and galleries.

This Toolkit is the successor to *Big Questions? Big Answers* (Scottish Museums Council, 2002). It is written for those who would like to understand what it means to be a museum. Establishing and running a museum is challenging and brings many responsibilities and many struggle for years without succeeding. So, as with *Big Questions? Big Answers* the Toolkit's starting point is to check whether you will best realise your aspirations through setting up a museum, or whether a different heritage initiative is more appropriate. It then asks tough questions about the commitment, time, resources, and circumstances needed for a new organisation to thrive.

This Toolkit brings together years of experience in advising and supporting museums, archives and other cultural heritage organisations to overcome challenges, renew their business models and thrive.

Whilst you may be passionate about sharing stories and objects with people, you will need to develop a similar tenacity and enthusiasm for business planning and the process of creating a sustainable and effective organisation.

We wish you luck with your project and hope you find this Toolkit useful on your journey.



How to use this toolkit

The Toolkit contains tools and checklists for making key decisions and activities that are essential to setting up a sustainable organisation. These are underpinned by the framework of the UK Museums Accreditation standard. It will help you to:

1. Decide if you want to create a museum
2. Arrange your governance
3. Manage your money
4. Look after your visitors
5. Look after your collections

Each section has an overview of the critical issues you need to be aware of and signposts to further resources and support, for example local networks or 'How to' guides on particular topics. It also asks the 'Big Questions' that will determine whether you are proceeding towards the museum or heritage initiative that is best for you.

These *Big Questions* are challenging and your answers will require some tough decisions. For ease of reference, all these questions are also brought together at the end of the Toolkit in the *Big Questions, Big Answers* checklist.

There is a wealth of information included – far too much to be absorbed at the start of a project. It is designed for you dip in and out as you plan what you need to do and review your progress, to allow you to firm up your next steps.



Some definitions

Before we start, please note that throughout the Toolkit, **museum** is used to mean a museum or non-commercial gallery.

Although the Toolkit has been written specifically for a Scottish audience, the principles are transferable elsewhere.

We have sought to reduce jargon as much as possible. Where we needed to use museum-specific language to talk about concepts commonly used in the museum world we have explained them in the [Glossary](#).

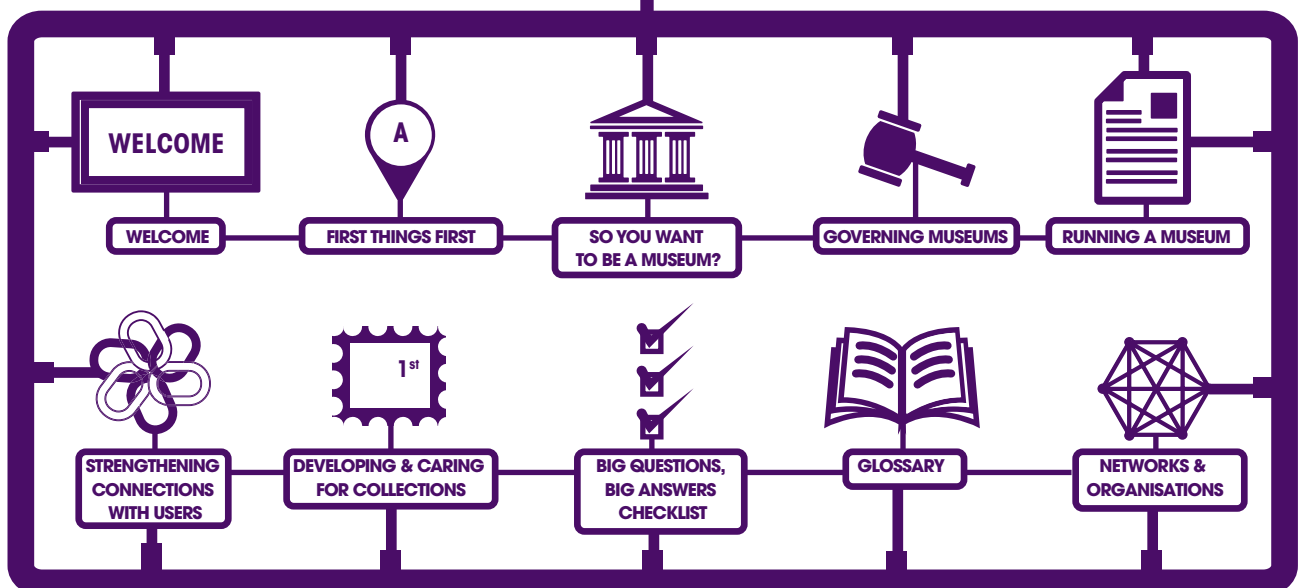


FIRST THINGS FIRST

CASE STUDY: MUSSELBURGH MUSEUM

2.1 What is your starting point?

2.2 Partnership working





2. First Things First

There are many different ways to celebrate, preserve and share the stories and objects that form our heritage – whether they are documents, photographs, recordings, or artefacts.

These include displays, websites, learning resources, community events and publications. Yet the first thing that people often consider is setting up a museum. This may or may not be the best way to achieve your ambitions.

Achieving any of these options requires a great deal of passion, energy and focus.

This section is designed to help you to select the right structure by:

- Outlining the key characteristics of the different options
- Exploring whether you could work with other organisations

You might want to revisit this section in the future as some options may be a stepping-stone on your way to a larger project.

Even if you are clear about what you want, the checklists in this section may be useful in helping you communicate your ambitions to those you need to influence.



Case Study:

Musselburgh Museum

Run by Musselburgh Museum and Heritage Group, an unincorporated charity, currently not an Accredited museum.

Musselburgh Museum is a small museum run by and for the people of Musselburgh. The original objective was to open a museum in the Old Town Hall, a historic and iconic building in the town, but a more practical and achievable solution came in the form of an empty shop.

In their own words

We started out in the 1980s as Musselburgh Museum Steering Committee. There was no museum in the town and we wanted to recognise and show off our heritage. We felt that the right place for this would be the former Town Hall, an iconic building in Musselburgh.

Over the years we organised and mounted exhibitions of three to four weeks duration in the Old Town Hall on aspects of our history. These were highly regarded, very well attended and hugely important for us as they aided our objectives, kept the committee in the public eye and gave us credibility. All this helped us to prove our case to the local authority that there was a need and demand for a museum in Musselburgh.

The level of political support for our venture varied over the years. East Lothian Council commissioned an independent report to investigate the feasibility of establishing a museum, the outcome of which was positive. However, as the Old Town Hall was not considered suitable, alternative premises had to

be found. The tipping point came when a local councillor came up with the idea of re-designating a vacant shop from retail to a museum. East Lothian Council led the procurement process for the design consultants, involving us at every stage along the way. We then worked with them on all aspects of the design and fit out.

The Council supported us by funding the initial building work and for ongoing costs associated with the building. Our museum is entirely staffed by volunteers. We have a contract for services with East Lothian Council which covers all aspects of our partnership, including the requirement to open the museum on a minimum number of days a year.

Our new museum opened in 2011. At the moment, we open three days a week from April to September. We put on regular displays using our collection, supplemented by regular donations and loans from the public. We receive an enormous amount of help and support in kind from the Principal Officer and permanent staff of East Lothian Council Museums Service.

Finance

We are staffed by volunteers who open the museum, create the exhibitions and run the organisation. East Lothian Council support us with the building costs but we need to find funding for our exhibitions. We have had success in the past with funding and have been awarded an HLF grant for our forthcoming World War I exhibition. We have a small sales outlet in the museum but it doesn't make much money.



Being a museum

We aren't yet Accredited. East Lothian Council would like us to be. We have registered an interest and have now decided to apply.



Find out more:

www.musselburghmuseum.org.uk

We are most proud of

- Our museum! When you walk in it has a lovely feeling. We have a timeline, great storyboards, excellent lighting and display spaces and have really made the most of our small space. And people see it as theirs – it's the museum for the people of Musselburgh.

Our advice for others

- Get the right support. In our case this was public support over a number of years and the right political support. It takes time but we are now regarded as a 'little jewel in the council's crown' and other people come to talk to us to learn about what we've done.
- Don't be afraid to start small. Our initial objective of having a museum in the Old Town Hall may still come to fruition, but for now we have something which is small but high quality and manageable – we can grow from here.



2.1 What is your starting point?

Audience need or market opportunity?

A community?

A collection?

This section will help you to identify your motivation and the potential audiences and resources at your disposal.

“If it were easy – everyone would do it”!

There are a number of different options you may wish to consider, along with their strengths and weaknesses.

Clarifying your thinking and understanding what you want to achieve is the first step to turning your idea into action.

In a nutshell: Choosing your model

- Be clear about what you have, what you want to do with it and who you want to do it for
- Look at the potential options and see if they work for you – which is the closest fit?
- Remember that the options suggested are not exhaustive and are not necessarily exclusive

Who do you need to involve?

Go through this checklist with others who are interested in, or could help with, your project. This creates a shared understanding of your ambitions, what you need to succeed and some potential pitfalls.

Checklist: Deciding what model to use

Ask yourself:

- How long do you want your project to run – months, years, decades?
- Do you have enough information to take a permanent decision?
- Are you looking for funding?
- Do you need an interim solution to test your ideas?
- Do you want activity or an organisation?



A. What do you have?

a) A building? ☐
Are you trying to preserve a building of historic interest – perhaps because of who lived there, its architectural significance, or its role in the community?

b) Objects? ☐
Do you have objects that have been collected over time, perhaps by a private individual, community or specialist interest group? Perhaps they have been offered as a result of changes in the community, such as the loss of an industry or way of life. A responsibility for safekeeping comes with the decision to collect. You will need to decide whether gathering objects together will continue and whether you intend to keep them on a permanent basis. You will need to take decisions about what and how to acquire objects, and how this relates to the collecting of existing museum organisations.

c) Photographs or documents? ☐
Oral recordings or films?
Groups of original records can be considered to be an archive and can provide evidence of significant stories. Oral testimonies are a popular and evocative way of capturing people's experiences, opinions, stories, language and accents.

d) Stories and information about a place or people? ☐
Perhaps your community organisation has undertaken research and brought together copies of documents and published sources for local reference. This can include genealogical indexes, directories, maps and copies of local reference material, such as newspapers.

e) Volunteers or community group? ☐
You may have an existing group of enthusiastic and committed individuals who want to encourage activity and strengthen the identity of a community. Ongoing commitment and availability of volunteers with a range of skills will be essential to a successful project.

Intangible Cultural Heritage

Cultural heritage is not limited to artefacts. It also includes traditions and knowledge passed from generation to generation. These include language, rituals, customs, performances and traditional craftsmanship. Keeping this intangible cultural heritage alive and constantly recreating it provides a sense of identity and continuity.

Restrictions

Some collecting is constrained by legislation. For example, human remains can only be held by certain organisations or with specific safeguards. This also applies to some forms of archives.



B. What do you want to do?

a) Exhibit? ☐

Exhibitions or displays, both long-term and temporary, are the most immediate ways of presenting collections to the public. You can do this using objects, written material, photographs and sound. Consider your location – collaboration with existing venues such as museums, libraries or local halls are more likely to reach established audiences. As will shopping centres, empty shops, or even pubs!

b) Interpret or tell stories? ☐

Do you want to explain or tell stories about people, places, events or objects? Your information can come from a variety of sources – from the people donating objects, local knowledge, your own expertise, or academic resources. Techniques are many and varied including the simplest labelling, written guides, guided tours, costumed interpretation, virtual tours, interactive displays, events, artworks, drama, boards, or digital apps.

c) Lend or borrow? ☐

Do you need to supplement your collection with items owned by other people to help tell a particular story? If you need to borrow items, you will need written agreements setting out the care and insurance conditions. Some museums will only lend if you are an Accredited museum. Lending your own items to other venues can raise the profile of your organisation and collection and will probably require similar safeguards.

d) Preserve heritage skills? ☐

Do you want to preserve the knowledge to make or repair things? This is particularly important for industries or ways of life that have all but disappeared. Although the numbers of specialist skilled craft workers have declined, the need to repair and maintain buildings and machines has remained.

e) Research? ☐

Using and building your knowledge about your collections, stories and skills can place you in a position of expertise. This can be shared through displays or publications, including websites. Also there may be demand to provide research facilities for others, or undertake research on their behalf.



C. Who do you want to do it for?

a) A local community? ☐

A common cause, interest, location or building can bring people together and create a focal point for a community. The activities involved in doing it, such as volunteering, staging events, temporary exhibitions, creating a meeting place, information sharing and fundraising will all contribute. Over time this focus can help to generate a sense of identity for a community and improve wellbeing.

b) Families? ☐

Families are often looking for something to do together. Heritage projects and organisations are attractive as they are fun and educational. Additionally, a child who visits with his/her family is more likely to involve their own family as an adult.

c) Learners? ☐

Learning opportunities do not only have to be for schools. Learning throughout life continues to have a strong attraction for many. Formal education encompasses pre-school, primary and secondary school, further and higher education. Object-based learning can bring subjects to life in ways not possible in the classroom. Informal learning remains popular.

d) Specialist community? ☐

Many individuals or groups are interested in having objects, research or resource spaces for their own use. The community you are working with may not be local. Shared interests with specialists, experts and hobbyists from across the world can create strong networks and communities too.

e) Tourists? ☐

VisitScotland evidence shows that heritage and culture is central to Scotland's tourism offer. At the same time, there are a growing number of attractions competing for tourists' time and attention. Most tourists take the form of 'day visitors'. Exploring how you can make your visitor attraction part of a wider experience in the area will help attract people and ensure they stay longer.

f) Young people? ☐

Young people are rarely considered as an audience in themselves outside formal education settings. However, young people are generally community-minded, committed, skilled and in search of new opportunities. Additionally they can bring new perspectives on how to do things.



D. For how long?

Two to three years?

☐

Sometimes short, sharp initiatives can transform how people think about a particular place or issue. It may be that once you complete a short-term project you embark on another new one.

Five to ten years?

☐

Working with buildings, building a research collection or establishing a community group are likely to require commitment of resources over a longer period.

Twenty years or more?

☐

Ensuring objects can still be enjoyed by future generations requires long-term commitment and resources.

Summary

A. What you have

.....

B. What you want to do

.....

C. Who you want to do it for

.....

D. For how long

.....



Potential Options

Identifying what you have, what you want to do and who you want to do it for will have helped you establish the reasons for your project. You are now ready to explore the various options that could help you realise it.

There is no exact formula that offers you a tailored solution. In reality the boundaries between the different models are more fluid.

The following are suggested options. Their key characteristics will help you explore which solution could be best for your project.

Community archive

A community archive is a group of documents or other records (such as, photographs, film and sound) brought together by people who share an interest in their community and how it developed. They are unique in providing a way for people of all backgrounds and ages to meet, talk about what they have in common, develop new skills, and capture stories that would otherwise be lost.

Examples can be found at [Community Archives and Heritage Group: Communities in Scotland](#)

Benefits

- Varied and interesting material
- Community focus
- Nationwide support networks
- Easy to make available online

Things to note

- Needs secure space to store an archive
 - Needs website or desk space for researchers
 - Medium-term commitment
-

Events producer

Events are the life blood of some communities. They often mark key events in the calendar of an area or people. Events allow people to come together to celebrate and explore their heritage in a creative fashion – reinterpreted for today's society.

Examples include [Stonehaven Fireballs Ceremony](#) [Scottish Highland Games Association](#)

Benefits

- No building or collection to maintain
- Focus on activity
- Partnership potential
- Lots of creative potential
- Wide variety of audiences from local community to tourists

Things to note

- May need public liability insurance
 - Event may create its own archive
 - Choice of profit or heritage focus
 - Short-term commitment
-



Potential Options continued

Exhibition

Exhibitions can take on many different forms and take place in a variety of buildings. Recent examples include online virtual exhibitions that allow viewers to decide what is included, to paintings reproduced on advertising hoardings. Partnerships with existing venues provide access to an established audience and can bring venues and objects to life in new ways.

Examples include

[The Grand Tour](#)

[The Johnstone History Society](#)

[The Wee Museum of Newhaven](#)

Benefits

- No building to maintain
- Focus on doing the things that interest you
- Partnership potential
- Does not necessarily need a collection
- Lots of creative potential

Things to note

- Security of space
 - Loan agreements
 - Agree how long the exhibition lasts
 - Short-term commitment
-

Heritage centre

A space with interpretative media and often used to share information and stories about a place and its communities. A useful orientation point and introduction to an area and a hub for community activities. A heritage centre may have a few objects, but it does not generally have ownership of a collection in perpetuity.

Examples include

[Fairfield Govan Heritage Centre](#)

[The Real Mary King Close](#)

[Knockando Wool Mill](#)

Benefits

- Focus on stories
- No collections to look after, manage or store, though can bring in items
- May regenerate a historic building

Things to note

- Not appropriate for preserving artefacts long-term
 - Building or location to operate and maintain
 - Medium/long-term commitment
-

Potential Options continued

Museum or gallery

Museums take many forms and sizes. While the traditional building with exhibition cases is the most common, some continue to innovate, for example through mobile museums.

See chapter 3 [*So You Want to be a Museum?*](#)
For a full definition of the term.

Examples include
[MAC – Fife’s Mobile Museum](#)
[List of UK Accredited museums](#)

Benefits

- Established model, widely understood
- Standards schemes to benchmark
- Established support networks
- Collections bring stories to life

Things to note

- Caring for collections takes responsibility and significant resources
- Large number of museums already in existence
- Often takes ten years or longer to be fully established
- Historic buildings often offer poor environment for collections
- Long-term commitment – agreeing to care for collections ‘in perpetuity’

Research service

A research service is a resource where people can engage in or commission research. These often hold large volumes of records or publications relating to a particular subject or geographic area. These records are often duplicates of primary material held elsewhere.

Some research services are operated by individuals as a private business whereas others are a branch of larger organisations such as army regiments.

Examples include
[Royal Highland Fusiliers: Battalion Archive](#)
[Scotland’s People: Genealogy resource](#)

Benefits

- No building to maintain, if using collections held by others
- Can focus on own subject specialism
- Can quickly generate expertise

Things to note

- Can acquire objects or records by accident rather than through strategic plans
- Can lack focus if the business model rests on accepting research commissions from other people
- Short-term commitment



2.2 Partnership working

Collaborative solutions

Having worked out what you want to do and achieve, think about who else you could work with and whether working with others will help you to achieve your goals.

There are many community heritage organisations and museums already in existence, a limited number of people available to visit them and increasing competition for money and resources. So before you start a new initiative, you need to consider whether you could achieve better results by working in partnership with an existing group or organisation. The first step is to find out what's already going on.

Who do you need to involve?

Be open about what you want to do – it helps to get people on your side. At this stage you should cast your net widely to identify those with similar or overlapping ambitions. Museums Galleries Scotland has a database of Scottish museums and knowledge of associated organisations. Your local authority might employ arts, culture or museum specialists who can provide initial advice.

In a nutshell: Partnerships

Make contact with existing museums, museum forums, tourist bodies, visitor attractions and community organisations to find out what is already happening and how your idea fits in

Collaborating on exhibitions, research or interpretation could significantly enhance or give a new life to an existing resource or organisation

Checklist: Partnership benefits

- Potential 'win: win' – the community, your group and the existing organisation all gain from sharing ideas, enthusiasm and resources
- The museum sector is a welcoming one – people are passionate about what they do and there are good networks of support
- Working in partnership could save you significant time and resources e.g. operational or governance costs



Collaborative solutions: continued

What to watch out for

- All parties need clarity of focus
- You will all have to compromise
- You all have to benefit
- There can never be enough effective communication
- Partnerships need active management to keep on track



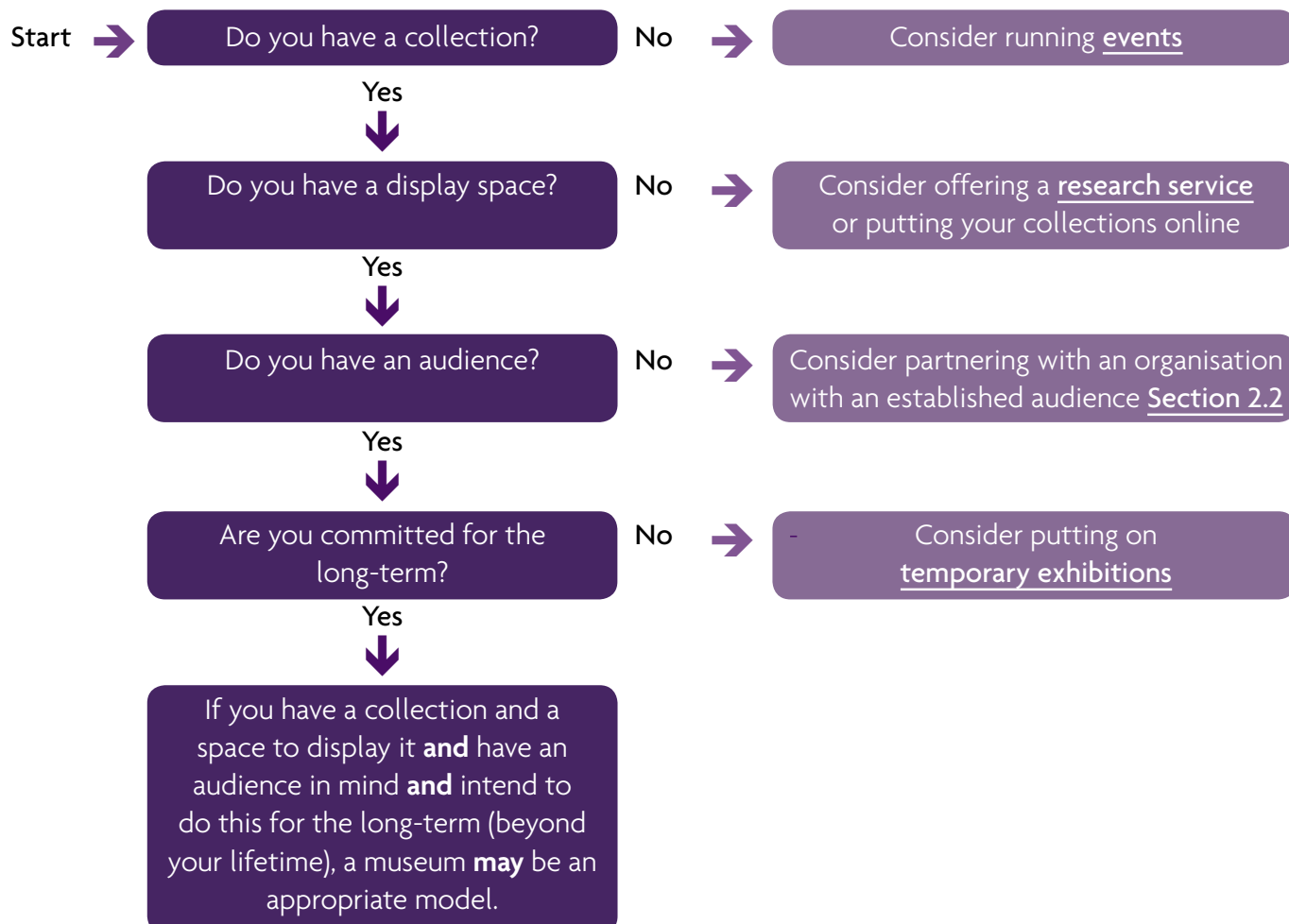
The Big Question: Is a museum the answer?

Heritage centre? Exhibition?
Online resource?
Community archive? Museum?
Or...?

You have now examined the options available for setting up a new organisation, the sort of activities you might want to undertake and the facilities you will need.

In some instances, the right decision for you might be not to set up a museum but to work differently.

The next step helps you ask the critical questions to determine whether a museum, or a different model is the best for you.





The Big Question: continued

If you have answered **‘no’** to any of these questions, a museum is unlikely to be the best choice for you at this point in time. Look at the alternatives and follow the signposts to the other bodies that could support you deliver that choice.

Why museum initiatives fail

Museums are in a very competitive environment. There are many hundreds of established museums, all competing for diminishing public funding and a finite audience. Initiatives don't succeed as museums for three reasons.

1. They are trying to be something they are not. Everything is a struggle, because they would be better suited to celebrating stories and heritage in a different way, rather than constrained by the responsibilities of a museum format.
2. Their business model is not robust and does not effectively address key challenges, principally:
 - an appropriate governance model
 - maintaining a tight control over finances
 - attracting enough visitors
 - keeping track of collections
3. The people involved do not have the right processes in place or lack commitment to work effectively together. This affects their capacity to take informed decisions, deliver the right activities or gain the support of stakeholders.

The following sections will give you an idea of this and other decisions you need to take to become successfully established.



Further information and resources

Community archive

Community Archives and Heritage Group

www.communityarchives.org.uk

Community Archives Accreditation Scheme

(Not be confused with the National Archives Accreditation Standard)

www.archives.wyjs.org.uk/archives-accreditation-scheme.asp

Oral History Society

www.ohs.org.uk

Scottish Council on Archives

www.scottisharchives.org.uk

Event producer

VisitScotland (includes Homecoming Scotland)

www.visitscotland.com

Exhibition

Touring exhibitions group

www.teg.org.uk

Heritage centre

Association of Heritage Interpretation

www.ahi.org.uk

Museum

Association of Independent Museums: Success Guides – Setting up a museum

<http://www.aim-museums.co.uk/downloads/3edb023b-f554-11e3-8be4-001999b209eb.pdf>

Museums Galleries Scotland: Guidelines for the care of human remains

www.museumsgalleriesscotland.org.uk/research-and-resources/resources/publications/publication/378/guidelines-for-the-care-of-human-remains-in-scottish-museum-collections

Culture 24

www.culture24.org.uk

Research organisation

Culture Grid

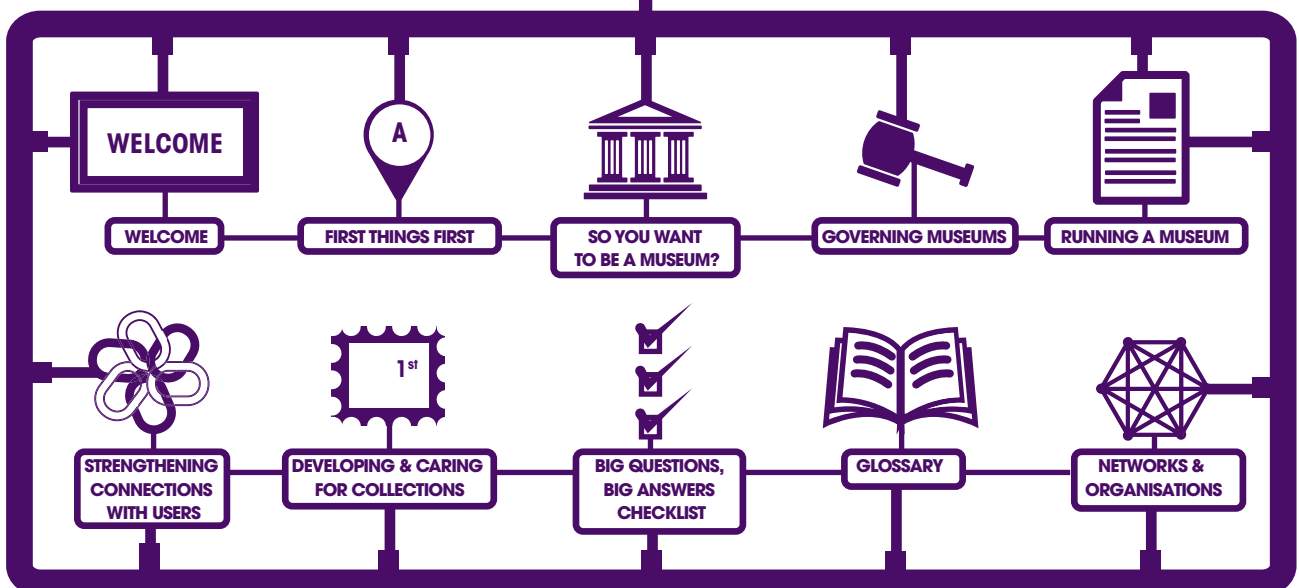
www.culturegrid.org.uk

Intangible Cultural Heritage

www.ichscotland.org



SO YOU WANT TO BE A MUSEUM?





3. So you want to be a museum?

Museum definitions and standards

A museum is defined as

A non-profit, permanent institution in the service of society and its development, open to the public, which acquires, conserves, researches, communicates and exhibits the tangible and intangible heritage of humanity and its environment for the purposes of education, study and enjoyment.

International Council of Museums (ICOM), 2007

Museums enable people to explore collections for inspiration, learning and enjoyment. They are institutions that collect, safeguard and make accessible artefacts and specimens, which they hold in trust for society.

Museums Association, 1998

Each definition emphasises collections and public use of them. Such collections are permanent and not intended to be sold. Museums Galleries Scotland uses the International Council of Museums definition.

The underpinning standard for museums in the UK is Museum Accreditation. Museums in Scotland also use the Continuous Improvement Framework (CIF, previously called 'QIS' or Quality Improvement System), a self-assessment tool for museums and galleries.

Museum Accreditation is designed to support and help museums keep a track of the full range of their work, and help them focus on the things that matter. It assesses museums against:

- How they are run (Organisational Health)
- How they manage their collections (Collections)
- The experience for visitors (Users and their experiences)

Museum Accreditation offers a practical framework that helps your organisation plan and move forward by identifying: where you are now; where you need to be, and how you are going to get there.

Not every museum chooses to work towards Museum Accreditation. However, it is a useful framework and thinking about its requirements early on will help you develop a sound grounding for your venture. At first glance it may seem daunting but don't be put off – the requirements are scalable for different types of museums.

The rest of this Toolkit will help you develop a plan towards achieving Museum Accreditation.



In a nutshell: Benefits of Museum Accreditation

- **Performance** A quality standard that serves as an authoritative benchmark for assessing performance, rewarding achievement and driving improvement
- **Profile** It raises awareness and understanding of museums, so building confidence and credibility both within the governing body and among the public
- **People** It helps museums to improve their focus on meeting users' needs and developing their workforce
- **Partnerships** It helps museums to examine their services and to encourage joint working within and between organisations
- **Planning** It helps with planning by formalising procedures and policies
- **Patronage** It demonstrates that the museum has met a national standard, which strengthens applications for public and private funding and gives investors confidence in the organisation

[Museum Accreditation Scheme](#), 2011

Checklist: Eligibility for Museum Accreditation

In order to be eligible, a museum must:

- Meet the Museums Association's 1998 definition of a museum
- Hold a long-term collection of artefacts
- Have a formal constitution
- Provide two years of relevant accounts
- Meet all relevant legal, ethical, safety, equality, environmental and planning requirements
- Be committed to forward planning to improve the service for users

What you need to know about Museum Accreditation

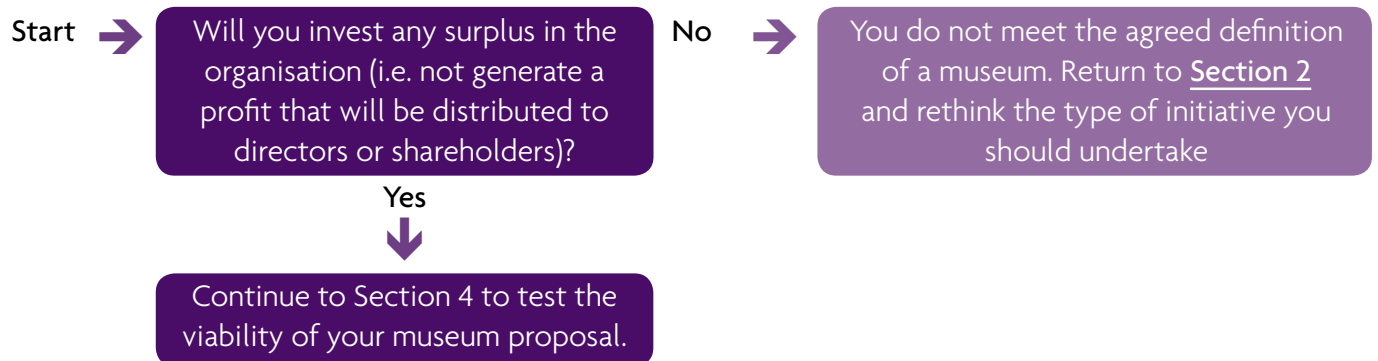
- UK-wide partnership, managed in Scotland by Museums Galleries Scotland
- Voluntary – you can still call yourself a museum without achieving the standard
- No charge to take part
- Relevant to all museums from the smallest community collection to the largest National
- Owned and developed by the museums community; assessed by a panel of museum peers
- Unlocks funding – working towards or meeting the standard is a prerequisite of many funders
- Working towards Museum Accreditation unlocks other support, including a Museum Mentor for independent museums that do not employ a professional member of staff (defined by Arts Council England as possessing a suitable qualification supported by recent relevant experience)



The Big Question:

Do you exist for the good of society?

This questions tests whether you will deliver benefit or value, working for the good of people now and future generations.





Further information and resources

Arts Council England: Accreditation standard and guidance documents

www.artscouncil.org.uk/what-we-do/supporting-museums/accreditation-scheme/guidance-documents/

Museums Galleries Scotland: Advice and support (including Museum Mentors)

www.museumsgalleriesscotland.org.uk/standards/accreditation/advice-and-support/



GOVERNING MUSEUMS

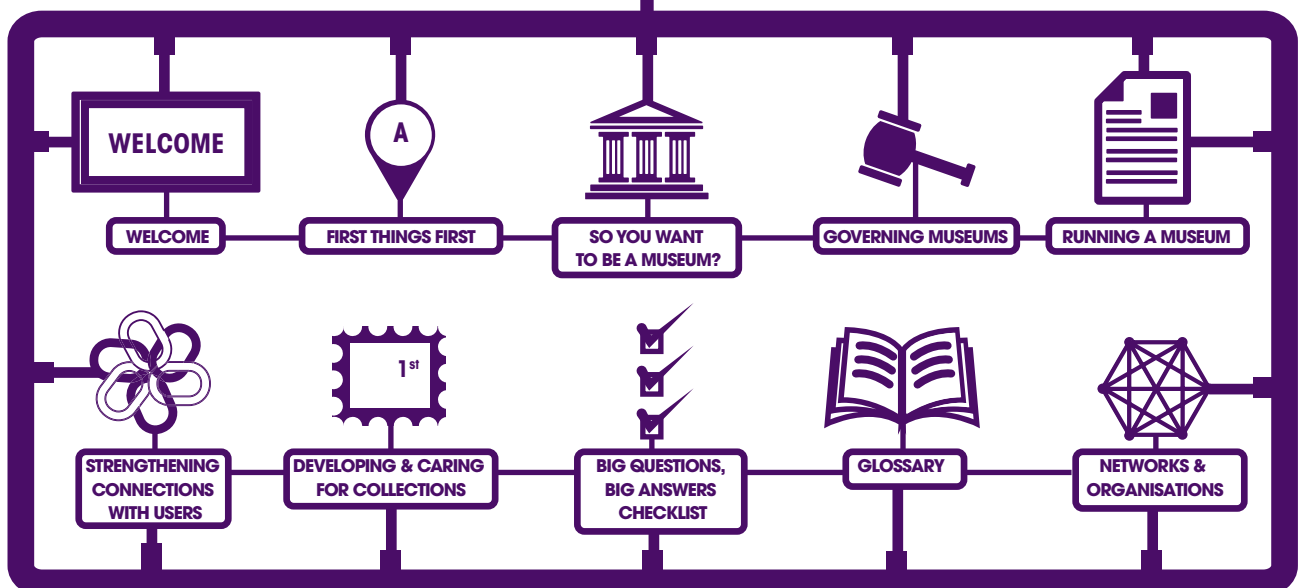
CASE STUDY: CUPAR HERITAGE CENTRE

4.1 Understanding the wider context

4.2 Defining and agreeing your museum's purpose

4.3 Building a coalition of support

4.4 Choosing a governing model





4. Governing museums

Museums exist and work alongside many different individuals and organisations. Understanding your unique offer and how it fits with that of others will help you to manage your organisation, its relationships and achieve your aims.

Every museum has a slightly different purpose. Being clear about your own purpose will make it easier to get the right people involved and make the best decisions for your future.

The museum world in Scotland is rich and diverse. There are hundreds of museums in Scotland and thousands across the UK. There is a development body for museums in Scotland – Museums Galleries Scotland – and a National Strategy for museums, *Going Further*. The government, local authorities and funders all have their own priorities which recognise museums to a greater or lesser extent.

Take time to understand this world. It will help you to identify potential partners, collaborators and funding opportunities.

This section will help you to:

- understand the museum world, how you will fit into it, find potential partners and look for opportunities
- define your purpose. Getting this right at the outset will make everything easier further down the line
- involve the right people. This means everyone from potential users, organisers and supporter to funders and decision makers
- choose the right governing document. This may seem like a bureaucratic detail but getting it right will help you to achieve your objectives and manage your risk



Case Study:

Cupar Heritage Centre

Cupar Heritage Centre is a community-run organisation which celebrates the history of Cupar through displays, exhibitions and events. A Scottish Charitable Incorporated Organisation (SCIO), it is not yet an Accredited museum.

The Heritage Centre is the culmination of the desire to celebrate and record the town's history. The perfect opportunity arose when they connected the space available at the railway station with funding to make use of it. They have now become an established part of Cupar's heritage and are consulted in their own right on matters affecting the town's future.

In their own words

As a former Royal and Ancient Burgh, Cupar has a rich heritage as a seat of judicial affairs and local government. Interest in collecting and documenting our history dates back to the mid-19th century, but it wasn't until the 1980s that the local authority had any real plans to open museums in the north east Fife district. And even then, they ran out of money before they reached us.

Then about fifteen years ago, Heritage Arts and Leisure came on the scene. As Heritage Arts and Leisure we continued the tradition of holding local talks and collecting artefacts and aimed to become a centre of excellence from which a museum would emerge. By chance we discovered that there was space available at Cupar Station, plus ScotRail were offering funding for community groups to 'adopt a station'. It took us four years, from our expression of interest in 2007 to opening the doors for the first time in 2011,

to piece together the funding and complete the building work. We changed our name to Cupar Heritage in 2009 to reflect our activities more succinctly as another organisation was emerging with an arts focus.

People

We worked hard to enlist public support and now have more than twenty active volunteers from all walks of life. We have become a 'go to' organisation in our own right for matters relating to Cupar's history and heritage – this in turn helps build our profile.

Governance

We chose to become a Scottish Charitable Incorporated Organisation to combine our charitable objectives with the right level of protection for our people and collection.

Being a museum

We have robust procedures for documenting our collection which we hope will hold us in good stead for Accreditation. We are running out of storage space and a priority for us is to address our storage needs. We hope to become an Accredited museum one day. In the meantime we make the most of networking opportunities and take part in museum forum events where we can.

Finance

We are entirely volunteer run. We rely on donations from visitors, member subscriptions and occasional grants for specific projects. Our premises are on a long lease at a peppercorn rent.



We are most proud of

- Getting our museum up and running
- Keeping our programme of talks going
- Winning an award for our station project



Find out more:
www.cuparheritage.org.uk

Our advice for others

- Do your homework – look at other museums and heritage centres and learn from others
- Network and get to know people
- Be patient – not everyone will share your enthusiasm
- Build community support – get people behind you, politicians too if you can
- Make the most of advice and help from your local volunteer centre



4.1 Understanding the wider context

How does your museum fit into its community and the museum world?

Museums will always be influenced by the policies and priorities of those around them. Knowing how your work aligns with the priorities of others could open up new opportunities, influence and funding.

The museum sector in Scotland and the UK is diverse. Museums are part of a rich ecosystem which means there is support and advice available, plus there are opportunities for local, regional and national collaboration. *Going Further* the strategy for museums in Scotland gives an overview of the direction of travel for the sector. Locally, your operating context may be informed by a range of things including tourism, education and health priorities and changes in how people live. Understanding and taking advantage of these opportunities will make running your museum far easier.

There are more than 400 museums in Scotland, over 250 of which are Accredited within a wider community of 1750 Accredited museums in the UK. It is likely that there are museums with similar collections or interests to you that will be able to help.

Nationally, Museums Galleries Scotland and other organisations will provide information, advice, guidance, access to training and sometimes funding.

There are also a range of networks and forums that you can join.



In a nutshell: A National Strategy

Going Further, the strategy for museums in Scotland sets the context for the sector:

Scotland's museums and galleries will be ambitious, dynamic and sustainable enterprises: connecting people, places and collections; inspiring, delighting and creating public value.

In identifying how museums need to respond current and future challenges, it prioritises

- maximising the potential of our collections and culture
- strengthening connections between museums, people and places to inspire greater public participation, learning and well-being
- empowering a diverse workforce to increase their potential for the benefit of the sector and beyond
- forging a sustainable future for sector organisations and encourage a culture of enterprise
- fostering a culture of collaboration, innovation and ambition
- developing a global perspective using Scotland's collections and culture

Going Further, 2012

The second Delivery Plan for the Strategy outlines how the sector can act together to ensure it remains relevant and increase its sustainability:

Realising the Vision: Delivering Public Value through Scotland's Museums and Galleries 2015-2019

Checklist: Analysing external environment

Using a PESTLE analysis can help identify potential changes, challenges and opportunities.

- **Political** What is the government doing? What has your local authority identified in its [Single Outcome Agreement](#)? How will health and education policies impact on your plans?
- **Economic** What is the current situation? Future trends?
- **Social** How is your local population changing? Demographics? How are lifestyles changing? Where do people go on holiday?
- **Technological** Innovations or competing developments?
- **Legal** Changes in the law?
- **Environmental** Weather patterns? Energy continuity? Resource shortages?

Once you have determined this you can plan your response.

- For things outside your control – plan how you will react to the impact
- For those within your influence – seek to shape the outcome
- For things in your control – review your plans and act

What to watch out for

- Being able to demonstrate how your museum contributes towards the National Strategy will make it easier to secure support from other museums, museum networks and Museums Galleries Scotland
- Don't get so absorbed in your project that you forget to keep an eye on how things are changing around you
- The high number of existing museums means there is considerable competition for available funding

Further information and resources

Convention of Scottish Local Authorities

www.cosla.gov.uk

Creative Scotland

www.creativescotland.com

Education Scotland

www.educationscotland.gov.uk

Health Scotland

www.healthscotland.com

Museums Association: Museums Change Lives

[www.museumsassociation.org/
download?id=1001738](http://www.museumsassociation.org/download?id=1001738)

Museums Galleries Scotland:

- **Going Further: The National Strategy for Scotland's Museums and Galleries**
- **From Strategy to Action: A Delivery Plan for Scotland's Museums and Galleries**

www.museumsgalleriesscotland.org.uk/national-strategy-and-delivery/

Scottish Government

www.scotland.gov.uk

MOSAIC Scotland

[www.experian.co.uk/marketing-services/
products/mosaic-uk.html](http://www.experian.co.uk/marketing-services/products/mosaic-uk.html)



4.2 Defining and agreeing your museum's purpose

What are you going to do?

For whom?

With what?

Being clear about the purpose of your museum, why it exists, what you want to achieve and for whom will make it easier to govern and run. These decisions will form the foundations of your organisation and provide the context and parameters of future choices. Succinctly communicating your purpose to stakeholders is essential to secure funding.

Why is purpose important? Can we not just get on and do something?

Museums rarely have enough money, people or time to achieve everything they would like. Given these constraints it is important to focus your resources on the decisions and activities that make the most difference and that make your museum distinct from others. If you intend to be a charity, a company, or both, your activities are bounded by regulations.

This section explores the fundamental principles of your museum. While it may seem simple, it is important to spend time thinking through the issues. Making the right choices now will save time and frustration later.

Who do you need to involve?

While it is tempting to take these decisions on your own, it is important to involve everyone setting up the museum together with other stakeholders who have an interest in your project or are key to its success. Ensure that everyone understands the basic principles behind your museum so that you can all make informed decisions.



In a nutshell: Identifying your mission

Being clear about what you want to achieve and why will help you take decisions, and also communicate clearly with stakeholders. Answering the following questions (based on the *Ashridge Mission Model*), will give you a series of statements that define your organisation:

Purpose

- What benefits do you provide to stakeholders?
- Who benefits?
- What will change as a result of your work? For example, are collections conserved, do visitors learn about a specific subject?

Values

- What are your beliefs and principles? Why do you care?

Strategy

- What is the commercial logic of your museum?
- What will you be good at?
- What are your constraints? For example, time, money, space?

Standards and Behaviours

- What rules and procedures do you have to run on a day to day basis?

[Ashridge Mission Model](#)

In action: Galloway Museum

This shows how the model was used by the (fictional) Galloway Museum to explain to a new trustee why they existed. This was important as the trustee was going to lead a new fundraising campaign. They thought it would be useful to condense their work into a few key sentences:

Purpose

- Care for objects that tell the history of the Galloway area
- Educate local people and visitors to the area about the history of Galloway

Values

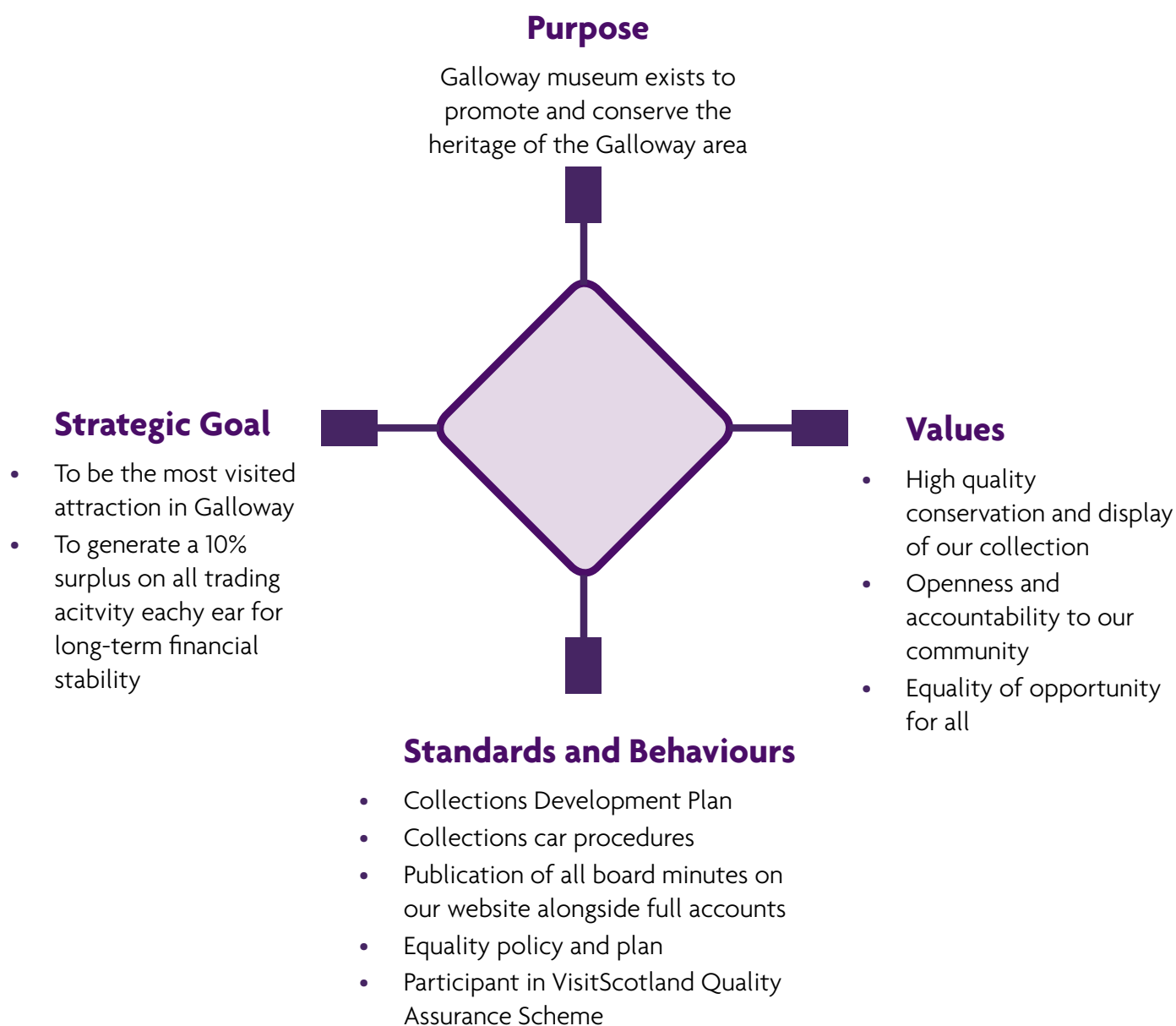
- Passionate about the heritage of Galloway
- Preserve it and share it with others

Strategy

- To be the best organisation that cares for and promotes the heritage of Galloway
- Use our committed volunteers
- Expand the current museum building, so more people enjoy our heritage and we can take better care of our collections

This is summarised on page 37.

Summary – In action: Galloway Museum





Further information and resources

Charity Guidelines

http://www.oscr.org.uk/media/1977/v50_meeting-the-charity-test-guidance_final.pdf

ICOM Code of Ethics for Museums (includes consideration of the purpose of museums)

http://icom.museum/fileadmin/user_upload/pdf/Codes/code_ethics2013_eng.pdf

Code of Ethics for Museums developed by the Museums Association

<http://www.museumsassociation.org/ethics/code-of-ethics>



4.3 Building a coalition of support

How can you get the right people involved in different roles?

A successful museum is as much about people as processes or infrastructure. **Effective museums are open, responsive and accountable. They actively engage users, beneficiaries, members, partners and others with an interest in their work.**

Building a coalition of support means involving people in the design, development, decision making and delivery of your museum. These people could be your (potential) visitors, people that live or work locally or those that have a stake in your museum because of their background or experience. They will also include members of your workforce and governing body.

In order to involve others you need to listen to them and understand their priorities and passions. Only then can you consider whether and how they can support (or even hinder) your plans.

As time and money are always in short supply, it is important to involve the right people in the right way. Ignoring key stakeholders will take you longer to achieve your ambitions. It is also very easy to spend too much time with people who love your work but are limited in how much they can help the development of the museum.

Who do you need to involve?

Identify those who have a genuine and legitimate interest in your work. This might include audiences, beneficiaries, donors, members, volunteers, staff, partners, regulators, or other government bodies and funders. They need to have a clear understanding of your work and your plans for the future.

In a nutshell: Understanding stakeholders

Come up with a long list of all groups, organisations or individuals who have an interest in your work.

Then use the matrix below to systematically plot their influence and importance.

- **Key Players – high interest, high influence**

These people are critically important to your museum. They need to be seen to support you and should contribute to your work. They have the power to stop or undermine your plans. Regularly communicate and consult with them at a senior level.

- **Meet their needs – low interest, high influence**

These people are important to your work. Have two way communication with them and engage on their area of interest. Try to get them interested in your work.

- **Least important low interest and influence**

These people are only indirectly affected by your work. Provide them with interesting stories and information and try to get them interested.

- **Show consideration – high interest, low influence**

These people are likely to be enthusiastic about your work. They are your supporters. However they can take up a lot of time. Keep them informed and consult them about your activities

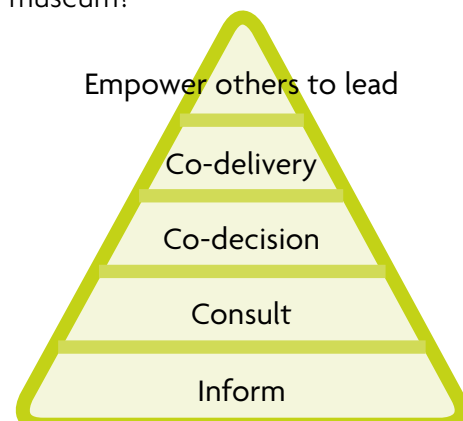
In action: Involving others

For each (major) stakeholder ask

- How do you talk to and consult with this stakeholder?
- Is this sufficient or too much?
- How do you (and should you) include their views in your decision-making?
- How can you improve this (including doing less)?

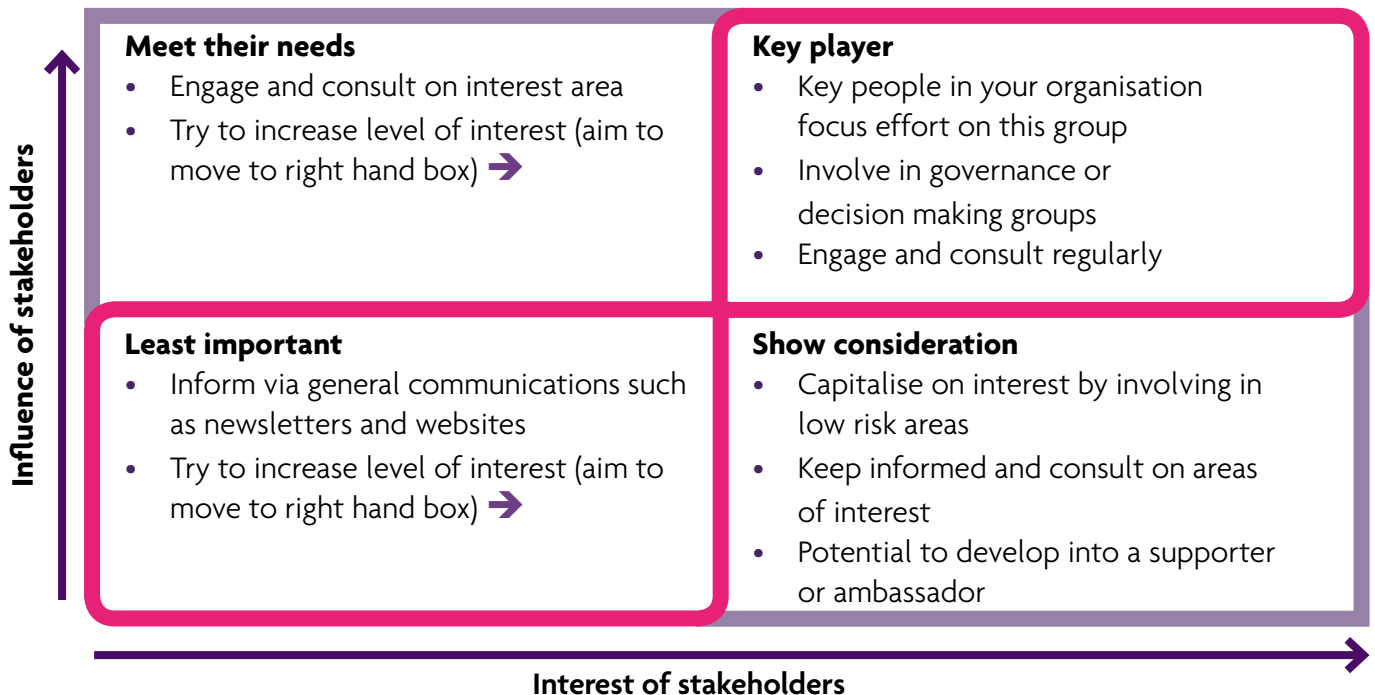
There are five main ways in which you can involve people in your museum, giving them different levels of influence in your decision making. All these methods are valid at different times. Your choice depends on what you wish to achieve.

- **Inform** How will you tell people about your museum?
- **Consult** How can you give people a chance to comment on and inform what happens in your museum?
- **Co-decision** Can you take shared decisions about, and influence the direction of, your museum with your community?
- **Co-delivery** In what ways can you involve others in developing and delivering your museum?
- **Empower others to lead** What actions can you take to empower others to have ownership of, make decisions about, and deliver activities in your museum?



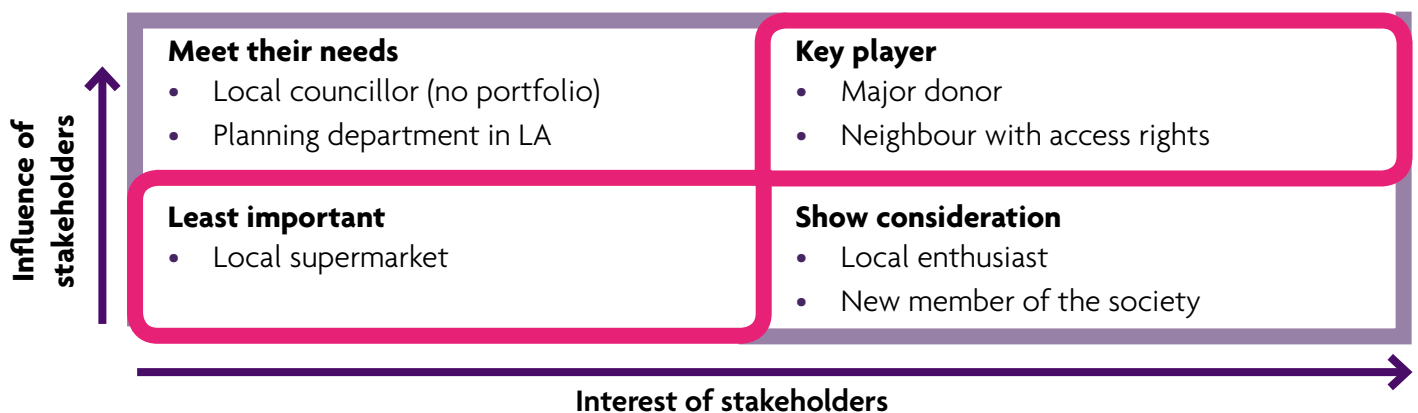
In action: Galloway Museum continued

Matrix for analysing stakeholder relevance and power



The new fundraising trustee undertook an exercise to work out how the museum's stakeholders could support or hinder their fundraising. They wanted to prioritise which people and organisations were essential to their work, and plan how best to work with them.

Galloway Museum stakeholder analysis





In action: Galloway Museum continued

Legal requirements and standards

- [Equality Act 2010](#)
- [National Standards for Community Engagement for Service Provision](#)

What to watch out for

- Communicate clearly and manage expectations
- There are no hard and fast rules as to how and when you involve people
- Sometimes acting alone can be appropriate, in other instances collaboration creates better results
- Being aware of the interests of your group can help channel your time and energy
- Stop any activity that does not fit your museum purpose



Further information and resources

Heritage Lottery Fund: Thinking about...

Community participation

<http://www.hlf.org.uk/community-participation>

Our Great Ideas

www.ourgreatideas.org

National Youth Agency: Hear by Right

<http://www.nya.org.uk/our-services/hear-right/>

Scottish Government: Community

Empowerment

www.scotland.gov.uk/Topics/People/engage



4.4 Choosing a governance model

Ensuring your museum model matches your ambitions

The choice of a governance model is one of the most important decisions that your museum will make. It has major implications for how you can operate – defining your area of activity and managing opportunities and risks.

The model is defined by the legal document that establishes your organisation, defines your purpose and determines how you will operate. It is the ‘rule book’ for the museum. Although there are a small number of options, there is no ‘one size fits all’ and it is best to take this decision slowly. It can also be referred to as:

- Rules
- Trust deed
- Constitution
- Articles of Association

As this choice has legal and financial implications, you should seek legal and financial advice before making any final decisions.



In a nutshell:

Governance document

It is a formal document which contains the following:

- What the museum is set up to do (objects)
- How the museum will do those things (powers)
- Who will run it (e.g. trustees)
- What happens if changes need to be made (amendment provision)
- What happens if the museum wishes to wind up (dissolution provision)
- How the museum will be run including arrangements for meetings, voting, accounting etc. (governance arrangements)

The governing document must be approved by the governing body. Depending on the legal status of your organisation, it might also need approval from

- Office of the Scottish Charity Regulator – OSCR (to be registered charity)
- HM Revenue and Customs (for tax purposes and Gift Aid)
- Local Authority (for rate relief)
- Financial Conduct Authority (for Industrial and Provident Societies)
- Companies House (for registered companies)
- Museums Galleries Scotland (to be Accredited)

Checklist:

Governance and Museum Accreditation

Not all constitutions are considered appropriate for Accredited museums, even though they might meet your needs.

All Accredited museums must be operated by public bodies or charitable organisations. Charitable and non-charitable companies limited by shares which distribute dividends are excluded.

When reviewing an application for Museum Accreditation, assessors consider

- Is the museum registered with the Office of the Scottish Regulator (OSCR) or recognised as such by HM Revenue and Customs?
- Does the constitution give the power to hold a collection and to operate a museum?
- Does the statement of purpose define why the museum exists and for whom?



Legal requirements and standards

Three statutes establish the obligations for most types of museums:

- [Charities and Trustee Investment \(Scotland\) Act 2005](#)
- [Companies Act \(2006\)](#)
- [Industrial and Provident Societies Act \(1965\), Financial Services & Markets Act \(2000\); Financial Services Act \(2012\)](#)

What to watch out for

- Make sure that the governance model you choose allows you to operate within the law
- Look especially at liability – does it protect your people against risk? If not, should your museum default on a loan or be taken to court, your trustees or directors could be individually liable for all costs
- Check that your trustees or directors understand their responsibilities.
- Local authorities and universities are empowered by national legislation to run museums and do not require a separate governing document
- Take legal advice from a recognised specialist before taking any final decisions

Overview of governance models

Aside from operating within a Local Authority or University, there are five common forms of legal status used by museums

- Trust Deed
- Unincorporated Association
- Limited Company
- Industrial and Provident Society (Community Benefit Society or Co-operative Society)
- Scottish Charitable Incorporated Organisation (SCIO)

Many museums are interested in becoming a 'social enterprise'. There is no legal definition of 'social enterprise'. It is commonly agreed to be a business with primarily social objectives whose surpluses are principally reinvested for that purpose in the business or in the community, rather than being driven by the need to maximise profit for shareholders and owners. Nearly any type of organisation can be a social enterprise as long as they have social objectives and reinvest some surpluses for that purpose.

Trust Deed

Appropriate for managing a specific collection or building.

A Trust Deed will set out the terms of the Trust, including purposes for which buildings, collections and monies are held and by whom.

Benefits

- Simple to set up
- Can become a charity
- Inexpensive to administer

Things to note

- Cannot employ people or own property (including collections) without a 'holding trustee'
- All trustees are individual and severally liable

Unincorporated Association

More appropriate for local history societies and groups.

A constitution or 'rules' will set out the powers and objectives of the organisation.

Benefits

- Simple to set up
- Can become a charity
- Inexpensive to administer

Things to note

- Cannot employ people or own property (including collections) without a 'holding trustee'
- All trustees are individual and severally liable
- Need to keep track of legal members with voting rights (as opposed to supporters)

Overview of governance models continued

Limited Company

The organisation is governed by Articles of Association. Common forms include

- Company Limited by Guarantee
- Company Limited by Shares
- Public Limited Company
- Community Interest Company

These articles need to be approved by the Office of the Scottish Charity Regulator (OSCR) in order for the company to be considered a charity. The company is also regulated by Companies House. Community Interest Companies must also have their articles approved by the CIC Regulator.

Not all legal forms of governing documents are acceptable to OSCR or for Museum Accreditation. In some instances their acceptability will depend on small details.

Benefits

- Has a legal identity; can employ people and own property in its own right
- Can have a membership, but this is not essential
- Limited liability for members and directors
- Share or membership models can create additional sources of income
- Some models allow for payment of directors/trustees

Things to note

- OSCR will not accept companies limited by shares
- OSCR does not allow the distribution of profit or benefit to members
- If a charity, the organisation is accountable to two regulators which brings increased administration

Industrial and Provident Society

Often used to buy or sell goods or services for the benefit of their members or community.

An Industrial and Provident Society (IPS) is an incorporated organisation and is governed by its own rules and IPS Acts. These organisations are regulated by the Financial Conduct Authority and some are considered 'exempt charities'. This means that they are not currently eligible to become traditional Registered Charities but they can be treated as charitable for tax purposes by HMRC.

Benefits

- Has a legal identity; can employ people and own property in its own right
- Local ownership through sale of shares can build support and generate income
- Opportunity to offer dividends to members
- Can be recognised as a charity

Things to note

- OSCR will only accept some IPSs as charities
- Future regulation of charitable IPSs yet to be agreed
- Must demonstrate why another governing model is not appropriate
- Share capital can be withdrawn (subject to rules)

Overview of governance models continued

Charitable Incorporated Organisation

Frequently used by smaller museums that want to limit their liability.

The Scottish Charitable Incorporated Organisation (SCIO) model has most of the benefits of a traditional company limited by guarantee. The main difference is that the SCIO has to report to OSCR and not to Companies House.

Benefits

- Has a legal identity; can employ people and own property in its own right
- Only one regulator – no need to report to Companies House

Things to note

- Relatively new model – some grant distributing trusts and foundations might not recognise an SCIO as eligible
- Possible complexity when using assets as collateral for a loan or for remortgaging



Further information and resources

Association of Independent Museums: Successful Governance

[http://www.aim-museums.co.uk/
downloads/727b74d1-04e4-11e3-b572-
001999b209eb.pdf](http://www.aim-museums.co.uk/downloads/727b74d1-04e4-11e3-b572-001999b209eb.pdf)

Get Legal: Decision Tool

(NB This is produced for an English audience
but is a useful decision-maker)

<http://getlegal.bwbllp.com/decision-tool>

Museums Galleries Scotland:

Choices for Change Toolkit

[www.choicesforchange.info/projects/choices-
for-change-toolkit](http://www.choicesforchange.info/projects/choices-for-change-toolkit)

Office of the Scottish Charity Regulator

www.oscr.org.uk

Scottish Council for Voluntary Organisations:

Setting up a Charity – Get Started Guide

www.scvo.org.uk/setting-up-a-charity

Voluntary Action Scotland

www.vascotland.org



The Big Question: Are you well governed?

Choosing a governing model that allows you to operate and protects you and your collections is an important decision in setting up your museum.

These next critical questions will help you assess whether you are legally set up to run a museum and how you fit within the museum sector and wider world.





RUNNING A MUSEUM

CASE STUDY:

LISMORE GAEELIC HERITAGE CENTRE

5.1 Developing a sustainable business plan

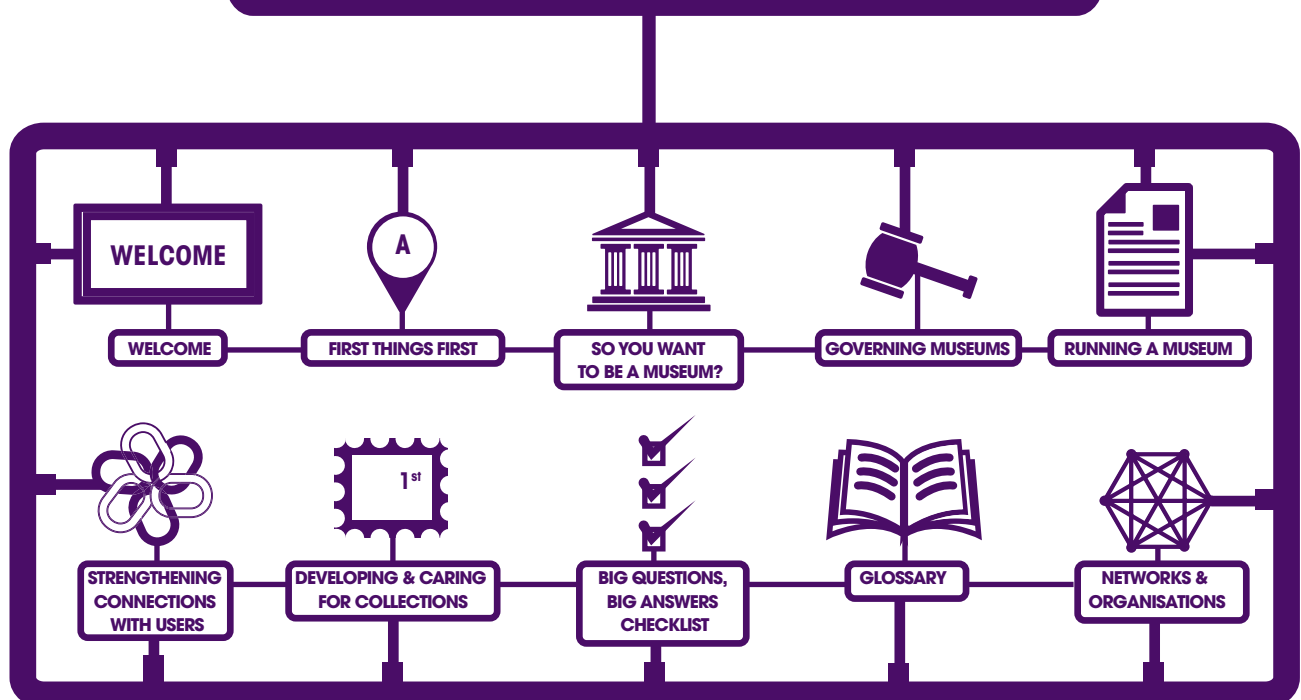
Business plan costs – template

5.2 Sources of funding

5.3 Working with staff and volunteers

5.4 Embedding equality and diversity

5.5 Reviewing plans and responding to change





5. Running a museum

Museums have a wide variety of functions ranging from developing and caring for collections, to engaging with visitors and communities, to keeping the building safe and welcoming. All these require some form of management to ensure the best use of money and other resources for the museum to achieve its aims.

Leading and managing a museum has many similarities to managing any other business.

Although we may be less comfortable with some of the terminology around profit, finance and accounting, unless the museum makes a surplus it won't survive beyond the short-term. Understanding your costs and cash flow, managing your risks and diversifying your income streams to reduce reliance on one source of funding will allow your museum to survive and thrive. Thus benefitting more and more people.

Managing staff, volunteers and other resources can be equally challenging (and rewarding). So often success comes down to the capabilities, determination and drive of individuals and their ability to get others behind the same idea.

It is not good enough for a museum just to deliver financially. Like other not-for-profit enterprises, you exist to make a difference for your identified communities. Unlike other charities, you have the additional responsibility of protecting and preserving your collection for the long-term.

Key issues to address are:

- Be realistic about all your activities, understand where the costs lie and where the income will come from
- Think long-term – if you have start-up or project funding what happens when it runs out?
- Get the right processes in place for working with people – they are your most important resource
- Expect and know how you will deal with change – it will happen!



Case Study:

Lismore Gaelic Heritage Centre

Lismore Gaelic Heritage Centre is social enterprise running a museum, shop, library and café on the Isle of Lismore at the southern end of the Great Glen. A charitable company limited by guarantee, it is also an Accredited museum.

The Centre was largely built up through successful grant funding. However, it is extremely difficult to secure grants for ongoing running costs and the organisation's key focus is now to develop a robust business plan to make sure it remains financially sustainable.

In their own words

Our story started in 1994 when our three founder members came together to form The Historical Society – Comann Eachdraidh Lios Mòr. They held a public meeting at which nine others joined – most of whom are still involved in the Comann. The teacher's house on the island became vacant and, after negotiation with the former Strathclyde Regional Council, Comann Eachdraidh Lios Mòr was established in the schoolhouse at Achnacroish in 1995.

Support from the Nadair Trust and Cadispa allowed us to employ an experienced fundraiser at a time when EU and other funding was available to community projects like ours. We succeeded in raising money firstly to restore the cottage, a typical 'cottar's house' and then for a new building to house our museum, which was completed in March 2007. The result is an ecologically friendly building designed to fit with the landscape and culture of this gentle and beautiful island.

Our centre has enhanced the social life of our island by providing a place for people to meet and has helped increase visitor numbers to the island as a place to visit. We are very much part of our community, run largely by volunteers and constantly engaging people with our collection.

Finance

We have had a lot of success in raising money for projects. But it's difficult to find money for running costs and we are now at a stage when we need renewal funding to address the ongoing wear and tear. We have been pleased to receive a grant from Just Enterprise www.justenterprise.org for a consultant to help us become more financially sustainable.

Being a museum

We have been collecting artefacts since the Society started. We raised funds for two part time museum officers who helped us establish proper procedures to care for our collection. We are proud to be an Accredited museum which is good news for the island – we now have somewhere for people to deposit local artefacts – for example the results of archaeological finds. The process has also highlighted the importance of proper governance and what it means to be the guardians of the building and the collection.



We are most proud of

- The courage and vision of the original founding group of islanders
- Our building and the social enterprise side of what we are doing
- Our collection
- Our focus on the Gaelic language and heritage which brings us support from far afield
- Being an Accredited museum



Find out more:

www.lismoregaelicheritagecentre.org/

Our advice for others

- Go for it!
- Make sure you have the right group of people with enthusiasm, skills and an understanding that much of what you will be doing may be routine and boring at times. A mix of vision and patience!
- Look past the shiny new projects and have a proper structured forward plan



5.1 Developing a sustainable business plan

A roadmap towards your goal

A brief but regularly updated business plan is one of the most important tools available.

It is 'a road map showing potential funders, trustees, stakeholders and most of all you, where you are starting from now, where you aim to go and how and when you are going to get there. It will also show them your plan for sustainability and how you will attract and generate the funds you need to pay for what's necessary.'

AIM Success Guide

It will help you keep track of how well the objectives that were set out are being met, whether you are missing any new opportunities, or whether changing conditions mean you need to stop some activities. Deciding what not to do is as important as deciding what you should be doing.

Plans may be called different things including a forward plan, corporate plan or business plan.

Any plan needs to be developed in the context of your purpose. (See [Section 4.1](#))

It needs to include:

- ways of identifying your operating costs and restricted funds
- where to look for sources of income and finance
- market research and where your visitors will come from
- identification and management of risk
- minimising your environmental impact
- ways to measure your progress and monitor your performance

Who do you need to involve?

While it is tempting to take these decisions on your own, it is important to involve everyone setting up the museum together with other stakeholders who have an interest in your project or are key to its success. Ensure that everyone understands the basic principles behind your museum so that you can all make informed decisions.



In a nutshell: Strategic planning

A strategic plan takes into account all the activities and their interrelation. It determines the basic long-term goals and objectives and the actions and allocation of resources necessary to achieve those goals. It is an iterative process consisting of the following steps:

Analysing

- Review the environment in which you are operating, including identifying trends and horizon scanning
- Assess stakeholder expectations
- Identify resources and capabilities

Choosing

- Identify options
- Evaluate options
- Select a strategy

Implementing

- Manage delivery
- Evaluate progress
- Review the plan

Adapted from *Johnson and Scholes*

Checklist: Planning

Gather together all information such as:

- Accounts
- Existing plans
- Projected visitor numbers
- Visitor feedback
- Funder's priorities
- Community needs

Identify

- Potential audiences
- Possible activities
- Available resources (money, people, collections, building, toilets, car parking)
- Changes that might affect the museum
- Options for taking advantage of new opportunities or mitigating their impact
- Projected income and expenditure
- Cash flow (particularly if your project involved large grants)
- How you will ensure things are on track (including benchmarking against others, for example using [How Good is Our Culture and Sport](#))
- Who is authorised to take decisions, how will they be made and recorded

Finally

- Keep the document live and under regular review by the whole team



Legal requirements and standards

- [Charities and Trustee Investment \(Scotland\) Act 2005](#)
- [Companies Act \(2006\)](#)
- [Museum Accreditation](#)

What to watch out for

- Avoid a business model that barely covers running costs, leaving no ability to invest in new developments, such as exhibitions or more fundraising projects
- Be alert to cash flow – especially when there is a delay between project expenditure and grant income
- Never mix up restricted project costs and unrestricted revenue

Further information and resources

Arts and Business Scotland

www.aandbscotland.org.uk/services-for-museums/

Association of Independent Museums: Successful Business Planning

www.aim-museums.co.uk/downloads/eb3f2a33-5b4d-11e3-aac1-001999b209eb.pdf

Birmingham Museums Trust: Risk Awareness Profiling Tool

www.raptonline.org.uk/welcome.asp

Creative Carbon Scotland

www.creativecarbonscotland.com

Heritage Lottery Fund: Business planning guide

<http://www.hlf.org.uk/project-business-plan-guidance>

Museums and Galleries Scotland: How to write a forward plan

www.museumsgalleriesscotland.org.uk/research-and-resources/resources/publications/publication/80/how-to-write-a-forward-plan

Office of the Scottish Charity Regular: Scottish Charity Accounts – full guidance

www.oscr.org.uk/publications-and-guidance/scottish-charity-accounts-updated-full-guidance/

Scottish Council for Voluntary Organisations

www.scvo.org.uk/running-your-organisation/



Business plan costs – template

Income

Unrestricted

| | |
|---|---|
| Earned Income – e.g. Generated Income – admissions, sales, café, membership | £ |
|---|---|

| | |
|---|---|
| Other Public Subsidy – e.g. Local Authority | £ |
|---|---|

| | |
|--|---|
| Contributed income – e.g. Sponsorship, donations | £ |
|--|---|

| | |
|-------------------|---|
| Investment Income | £ |
|-------------------|---|

| | |
|----------------------------------|---|
| Other Income, including Gift Aid | £ |
|----------------------------------|---|

| | |
|-------------------|---|
| Restricted | £ |
|-------------------|---|

| | |
|--------|---|
| Grants | £ |
|--------|---|

| | |
|---------------------|---|
| Total Income | £ |
|---------------------|---|

Business plan costs – template continued

Expenditure

| | |
|--|---|
| Staff Costs | £ |
| Salaries (including temporary cover for holidays and sickness) | £ |
| Social Security and Pension costs | £ |
| Overheads | £ |
| Rent | £ |
| Rates | £ |
| Heat/Light/Water | £ |
| Building maintenance | £ |
| Insurances | £ |
| Telephone & Fax | £ |
| Cleaning | £ |
| Print/Post/Stationery | £ |
| Travel and subsistence (including volunteer expenses) | £ |
| Consultants Fees & Subscriptions | £ |
| Legal & Professional | £ |
| Audit & Accountancy | £ |
| Bank Charges | £ |
| Equipment Purchase | £ |
| Training and staff development | £ |
| Professional memberships | £ |
| Programmes | |
| Collections care and conservation | £ |
| Exhibitions and events | £ |
| Community engagement; education | £ |
| Total Expenditure | £ |
| Operating Surplus/(Deficit) | £ |



5.2 Sources of funding

Diversifying for sustainability

Reduced public funding, lower returns from investments and increased competition for grants means that museums have to be more persistent, organised and entrepreneurial than ever about where they look for funding.

Museums have always been funded in different ways. Seeking to reduce their reliance on one source of income, museums are more likely to be funded by small sums from a range of sources. These range from admission charges to grants and investment income.

Museums are also thinking more creatively about how to generate income, sometimes looking beyond their core business, such as acquiring buildings for investment income and capital growth. Seeking income that is a good match for your organisation's mission and strengths has a greater chance of success. For example, charging for a 'behind the scenes' experience. However, be aware that trading activity may be restricted by your governing model and in some cases you may need to establish a separate trading company.

A high turnover is not the same as a high surplus. Turnover indicates the amount of business being done, and whether you are solvent. A surplus, or profit, is needed to develop the business. Both a healthy turnover and a level of surplus are needed for a sustainable organisation. Increasing the proportion of unrestricted income will help you to be more flexible.

Who do you need to involve?

- Funding is about building and maintaining long-term effective relationships
- Involve everyone – donations and sales come from building relationships with visitors and supporters. All staff and volunteers can champion the museum and its benefits
- Trustees – may have a role in fundraising, or additional patrons may be recruited



In a nutshell: Funding sources

You can reduce your funding uncertainty by diversifying your income streams. Your mix of funding sources is likely to include several of the following:

Income generation

Generally covering core running costs

- Admission charges – potentially the highest proportion of your income
- Café – either your own, or one operated on your site by someone else
- Delivery contracts – delivering services for another organisation
- Products – exhibition merchandise, special events or reproduction licences
- Retail sales – from your shop, the sale of reproductions or research fees
- Learning sessions – charges for school sessions or other activities
- Venue hire and hospitality – meeting rooms, weddings or events

Grants

Usually one-off project and development costs, though some do cover ongoing running costs

Individual and corporate fundraising

- Fundraising events – coffee mornings, sponsored activities
- Gifts and donations – traditional donation boxes, bequests, regular giving, online giving and crowd-funding
- Membership schemes – annual payment for benefits such as reduced admission
- Sponsorship – perhaps from local businesses

Investments

- Interest from your reserves
- Increased value of assets, such as your building

Maximise what you have, for example through Gift Aid, and reduce your costs through smart procurement.

Checklist: Grant applications

- Do your homework. Target the funder with the best match between your aims and theirs. Avoid a scattergun approach, it is rarely productive. A funder's annual report should give you an indication of what they have funded and by how much
- Make contact with the grants officer or funder well in advance of submitting your application. They may be able to guide how you shape your application and provide an indication about your chances of success
- Make sure you are eligible to apply and that your projects meet any criteria. There is no point wasting time writing an application if you do not meet the criteria
- Involve your colleagues and draw on knowledge from across the organisation
- Identify what will make your project stand out
- Clearly describe what you will do and the difference the project will make.
- Avoid jargon specific to your sector or organisation
- Make sure your budget figures make sense and add up
- Persuading donors that supporting culture is as important to the wellbeing of the community as other charitable causes is critical
- Look beyond 'heritage' grant streams. Think about sources of funding linked to the subject of your collection or the groups of people you want to work with, for example technical skills for young adults



Legal requirements and standards

- [Scottish Charity Law in Relation to Fundraising and Public Charitable Collections](#)
- [Institute of Fundraising Code of Fundraising Practice](#)

What to watch out for

- Some governing documents come with restrictions on trading activity. In some circumstances a separate trading arm may be recommended
- Make sure you identify all the costs associated with an income stream – it may cost you more than it can generate
- Think about the full cost of generating different types of income and develop those that offer the best return for your investment of time and money

Further information and resources

Arts and Business Scotland

www.aandbscotland.org.uk

Association of Independent Museums:

Success Guides

- Successful fundraising at museums
- Successfully negotiating business rates
- Successful museum cafes
- Successful retailing
- Successful venue hire

www.aim-museums.co.uk/content/success_guides/

Heritage Alliance: Funding Directory

www.theheritagealliance.org.uk/

fundingdirectory/main/fundinghome.php

Heritage Lottery Fund

www.hlf.org.uk

Museums Galleries Scotland: Guide to funders

www.museumsgalleriesscotland.org.uk/funding/other-funders/

National Council of Volunteer Organisations:

Sustainable Funding

www.ncvo.org.uk/practical-support/funding/sustainable-funding

Scottish Council of Voluntary Organisations:

Funding Scotland database

www.scvo.org.uk/running-your-organisation/funding/



5.3 Working with staff and volunteers

Building a dedicated and effective team

A ‘can do’ team with a mix of interests and skills is essential to driving forward plans for the museum and operating it day to day.

People are the central resource for charities, whether employees, volunteers or agency staff. Securing people with appropriate skills and experience for your board, volunteer or staff team and establishing a place of work, where everyone can contribute their best will take you a long way towards your goals. Reconciling the needs of employees, trustees and volunteers can sometime cause particular tensions that need to be addressed.

Charities that work with children or vulnerable adults also need to take action to protect their beneficiaries.

Employees

If you employ staff, you must follow employment law which applies to all organisations.

Employees have a range of statutory rights. These include:

- A written statement of terms of employment
- To be paid at least the national minimum wage
- Paid holiday – 28 days a year, including bank holidays is indicative for most full time employees
- To ask for flexible working to care for children or adult dependents
- A maximum 48-hour working week

Part-time workers have the same contractual rights (pro-rata) as comparable full-time workers. Fixed-term employees have the same contractual rights as comparable permanent employees.

Additional rights for employees may also be set out in their contract of employment.



Volunteers

Museums have a long tradition of volunteering. Half of Scotland's museum workforce are volunteers, with volunteers outnumbering paid staff in museums run by charities. Almost all museums involve volunteers in their work, and a quarter of all museums are entirely run by volunteers.

People volunteer for many different reasons and volunteers will come from diverse backgrounds. They may need a stepping stone to employment or want to support the museum, keep their skills up or make new friends. Volunteering provides many benefits to museums, including increasing their capacity to undertake activities.

Although they often bring great skill and dedication to their roles, volunteers are not employees and they do not have employment rights. Rather than a contract of employment, volunteers have a role agreement, setting out mutual expectations and behaviours. Care should be taken not to imply that there is a legal contract of employment, and you may wish to consider getting legal advice when developing a role agreement document.

In charities, trustees have specific responsibilities. They are responsible for the governance and strategy of the organisation. They must make sure that their charity is administered effectively and can account for its activities and outcomes.

Safeguarding

If your staff or volunteers work with children or vulnerable adults you may need to register them with the Protecting Vulnerable Groups scheme through Disclosure Scotland. (See also [Section 6.4](#))

Getting the best out of people

Managing staff or volunteers involves much more than the statutory requirements. It can take a significant amount of time. Investing in your people reflects their significance as a skilled, knowledgeable and enthusiastic resource.

Above all, remember to let staff and volunteers know they are appreciated. Find ways of demonstrating this often, whether it be celebrating weekly with cake (!), or an annual event.



In a nutshell: Approaches to volunteering

Although people can stereotype volunteering as a regular ongoing activity and commitment, museums should recruit volunteers in flexible ways to meet the needs of the organisation. Consider:

- Project volunteers, for example for a fixed term activity
- Occasional volunteers, for example for one-off events
- Off-site volunteers
- Micro-volunteering – giving 30 minutes here and there, for example social media support
- Recruiting existing groups as volunteers such as groups of friends or employees
- Regular, ongoing volunteers for day-to-day activity

Checklist: Coordinating Volunteers

- Appreciate the differences between coordinating volunteers and managing staff
- Ensure everyone in the organisation knows why you involve volunteers
- Develop appropriate roles, matching the right volunteers with the task and putting volunteer agreements in place
- Budget for the resources you will need to support volunteers, including expenses and supervision time
- Seek to ensure your volunteer and staff base reflects the full diversity of your community
- Know what motivates people to volunteer and to stay
- Adopt fair recruitment procedures
- Ensure a comprehensive and consistent induction process
- Validate (and visibly celebrate) the contribution your volunteers make



Legal requirements and standards

- [Disclosure Scotland](#)
- [Employment Act 2008](#)
- [Investing in Volunteering](#)
- [Investors in People](#)
- [Protection of Vulnerable Groups \(Scotland\) Act 2007](#)

What to watch out for

- Appreciate that people have different motivations for working or volunteering
- Recruit enough people with a range of skills to cover all your roles, for example sales skills for shop volunteers
- Think carefully about where you advertise to maximise the diversity of your staff and volunteers. Don't forget about young people – how about a young person's panel to help you plan activities that appeal to their peers?
- Have a staff handbook for all staff
- Remember your employers' liability insurance
- Don't forget to use your volunteers 'day job' skills – for example HR, legal
- Volunteers can be reimbursed for their out-of-pocket expenses, supported by receipts. They must not receive any form of remuneration or benefit
- Volunteers are not totally free. You need to pay their expenses, send them information and take time to manage them



Further information and resources

Association of Independent Museums: Success guides – Recruiting and training volunteers

www.aim-museums.co.uk/downloads/96a5e2a2-b1c7-11e2-b572-001999b209eb.pdf

Citizens Advice Scotland: Rights at Work

www.adviceguide.org.uk/scotland/work_s/work_rights_at_work_s/basic_rights_at_work.htm

Office of the Scottish Charity Regulator: Trustee Duties

www.oscr.org.uk/managing-your-charity/trustee-duties/

Volunteer Scotland

www.volunteerscotland.org.uk

Membership of organisations such as Scottish Council of Voluntary Organisations or the Federation of Small Businesses will often gain you access to advice on human resource issues.



5.4 Embedding equality and diversity

Making your museum accessible to all

Equality is ensuring individuals or groups of individuals are treated fairly and equally and no less favourably, specific to their needs. This includes areas of race, gender, disability, religion or belief, sexual orientation and age. Promoting equality should remove discrimination, including bullying and harassment.

Diversity aims to recognise, respect and value the differences in people's contributions, allowing everyone to realise their full potential.

Ensuring museums are relevant to their many audiences is critical to their survival and social purpose. Meeting your obligations under the Equality Act will help you achieve this.

Good practice will involve your audiences in decision-making and trying to make sure all your communities are reflected in your workforce.

Equality and diversity can be promoted and embedded by:

- creating an inclusive culture and treating all staff, volunteers and visitors fairly
 - designing your exhibitions, displays and activities so that they don't discriminate against individuals or groups and that all your visitors can take part in them
 - encouraging your entire workforce to develop to their full potential
 - making sure that everyone knows how to recognise and challenge inequality and discrimination
 - making sure your policies, procedures and processes don't discriminate
 - encouraging everyone, where practical, to have a say in museum decision-making
 - broadening where you advertise for staff and volunteers
-

Who do you need to involve?

Everyone is responsible for, and has a role to play, in ensuring equality and diversity. Trustees and staff need to consider how they recruit others. Front of house volunteers or staff are central in welcoming everyone and making sure their visit is safe and comfortable. Those working on collections need to consider the extent to which the collections and their stories represent all aspects of your museum and its communities.



In a nutshell: The Equality Act 2010

The 2010 Act consolidates and strengthens previous laws. Characteristics that fall under its protection are:

- Age
- Disability
- Gender reassignment
- Marriage and civil partnership
- Pregnancy and maternity
- Race
- Religion and belief
- Sex
- Sexual orientation

The act prohibits:

- Direct discrimination, including by association and perception
- Indirect discrimination
- Pregnancy and maternity discrimination
- Harassment
- Third party harassment
- Discrimination arising from disability

It also includes a duty to make reasonable adjustments.

The Act applies to all organisations that provide a service to the public. Failure to comply will leave you open to legal challenge from individuals or groups.

Checklist: Embedding equality

- Everyone working with the museum needs to be sensitive to the implications of equality and diversity and actively engaged in addressing issues
- Make sure that you have made 'reasonable adjustment' to allow people to access your museum, its collections and its displays
- If you are in the early stages of designing your museum or making adaptations to it, consider compliance with British Standard 8300 to be sure that you meet the needs of people with disabilities
- Consider how decisions are made? How can people influence your decision-making? How transparent is it?
- How do you involve different sections of your community, e.g. young people?
- Where do you recruit?
- How do you make people feel welcome?
- Why might people not feel welcome?

Legal requirements and standards

- [British Standard 8300](#)
- [Equality Act \(2010\)](#)

What to watch out for

- In catering for one group you might inadvertently put off another
- Saying anyone is welcome to come is not the same as actively removing barriers. Many different things are perceived as barriers



Further information and resources

Equality and Human Rights Commission: Equality Act Starter Kit

www.equalityhumanrights.com/advice-and-guidance/new-equality-act-guidance/equality-act-starter-kit/

Equality and Human Rights Commission: Guide for Service Users about their rights under the Equality Act 2010

www.equalityhumanrights.com/advice-and-guidance/service-users-guidance/

VisitScotland: Access statement

<http://scotland.tourismtools.co.uk/>



5.5 Reviewing plans and responding to change

Business as usual

Change is the normal state, not something that happens once and then stops.

This is true for new enterprises where ‘normal’ has yet to be established, however it also applies to more established organisations. Yet it can feel confusing for museums whose aim is to create stability to ensure collections are preserved for future generations.

Some changes come about because of external factors such as developments in technology, the economic outlook, because audience expectations continue to evolve or another organisation or business starts competing for their time and attention.

Others come because of something you do or don’t do, for example getting funding for a new gallery, or not fixing a loose slate so you then need to replace the whole roof!

Resilience arises from your approach to actively managing, reviewing and adapting your plans, keeping focused on your goals.



Checklist: Managing change

- Keep a clear vision – the route may vary, but the direction remains the same
- Keep communicating with stakeholders to manage expectations and maintain trust
- Don't jump in with solutions. Take time to identify the problem correctly
- Scan the horizon regularly – look beyond your walls and outside of your area of immediate interest
- Don't take on more without considering whether you need to stop doing something to free up time to focus on the new activity
- Identify how you will monitor progress and when you will revise your plans and activities to incorporate what you have learnt

What to watch out for

- Recognise that everyone responds differently to change
- Loss of focus can lead to uptake of disparate activities that do not deliver effectively against your goals
- Poorly managed change can increase costs



Further information and resources

Evaluation Support Scotland

www.evaluationsupportscotland.org.uk

Governance Hub: Tending your Board

www.clubhouse-qa.org.uk/policys/Tending%20your%20Board.PDF

Museums Galleries Scotland: Choices for Change

www.choicesforchange.info

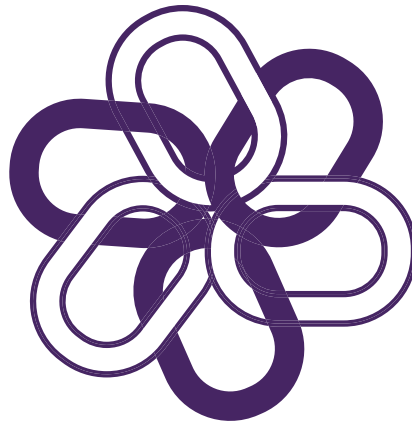


The Big Question: Do you have a viable museum business?

It is fundamental that you can generate enough income to run the museum from year to year to cover all your costs and allow you to invest in keeping it fresh and relevant.

The next step helps you ask the critical questions to help you determine whether you have a sustainable business model.

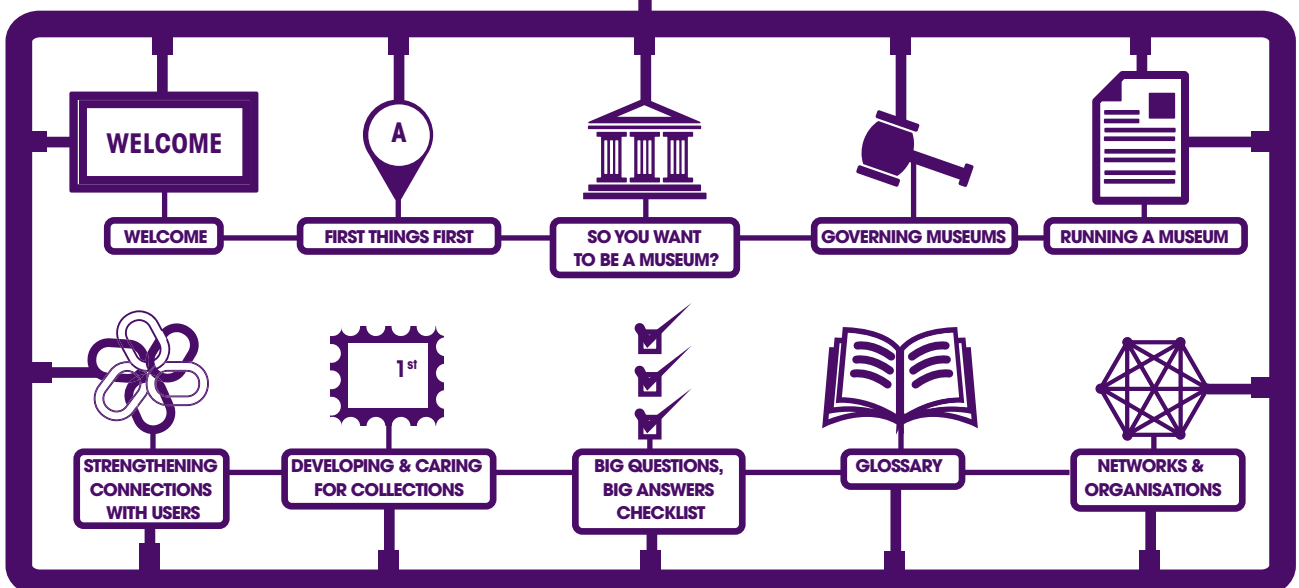


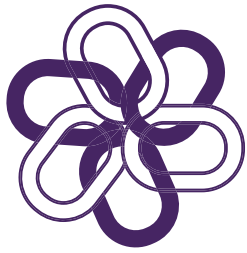


STRENGTHENING CONNECTIONS WITH USERS

CASE STUDY: COASTAL COMMUNITIES MUSEUM

- 6.1 Creating a visitor attraction
- 6.2 Reaching audiences
- 6.3 Communicating with visitors
- 6.4 Formal and informal learning





6. Strengthening connections with users

Engaging with users is fundamental to museums. Creating a welcoming and accessible environment with appropriate services and well maintained facilities is essential to achieving this.

Museums are competing with lots of other leisure opportunities. Even if you have a generous benefactor, attracting enough visitors will be vital to the sustainability of your museum.

In order to attract visitors and make sure that they have an enjoyable time you will need to have a range of facilities alongside a place to display your collections. You will want this to be open and accessible to visitors, which means thinking about how people will find, enter, use and move around the space.

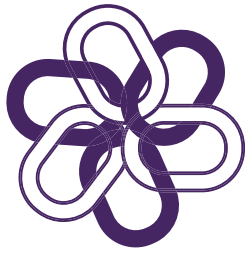
While it is best to target a particular audience(s), you also need to ensure that you have removed or reduced potential barriers to access.

Understanding, knowing, listening and communicating with your users is at the heart of designing relevant programmes, services and exhibitions and promoting them effectively.

Museums bring learning to life, inject fun and even increase educational attainment.

Key issues to address are:

- Understanding who will visit and why – ensuring your museum appeals to enough people
- Creating an attractive and welcoming environment and looking after your visitors.
- Identifying how you want to broaden or increase your audience
- Identifying how far you want to involve your users
- Choosing how to bring your collections to life through interpretation
- Creating offers for schools and others who want to learn



Case Study:

Coastal Communities Museum

The Coastal Communities Museum is a community museum based in North Berwick for the whole surrounding area. It is volunteer run, in partnership with East Lothian Council. It is a Scottish Charitable Incorporated Organisation, but not yet an Accredited museum.

This museum recently reopened having been closed for eleven years. It is very much a museum by and for the people of the area and much of the exhibition content will come directly from local groups.

In their own words

We'd had a museum for North Berwick since 1957 in a former school building. The building didn't meet health and safety and access requirements and so East Lothian Council closed it down in 2002. Local people didn't want their museum to disappear – but no-one had the money to pay for the repairs. Support for the museum continued through the Friends of Berwick Museum and other groups. They petitioned the Council who eventually, in 2011, committed £1.5m capital funding to renovate the building which also holds the library and a café.

When the Council were in a position to support the renovation works they recruited a range of partners to form a shadow committee – some of the original campaigners were still on board and were joined by others with specific skills. Our remit has widened to include North Berwick and the surrounding villages.

Our first task was to make sure we were properly incorporated and in December 2012 we established the Coastal Communities Museum Trust as a Scottish Charitable Incorporated Organisation (SCIO). This all took time as we were a new group who hadn't worked together before and needed time to get to know each other and work out what we wanted to do.

We gave ourselves the goal of opening in July 2013. This coincided with the Open Golf tournament coming to Muirfield in East Lothian – and the last time it had come here was in 2002 when we closed. So we wanted to “Reopen for the Open”! It was an intense period of activity, but in hindsight the date gave us the focus we needed to make something happen.

The reopening was hugely successful – 5500 people came, 45% of them from the local area. The community link is vital to us. We work in partnership with lots of groups and societies and will be relying on them to provide content for the museum. In fact the success of the opening led to demand for us to be open throughout the winter – and it was our partners who came through with the exhibition content.

We now need to return to basics and work out what kind of organisation we want to be and how we can fund it. Do we want to be an Accredited museum with all that entails? Or do we want to keep a more home-grown community feel? Or both and more? We haven't yet decided.



Finance

We are entirely volunteer run. The Council renovated the museum, gave us some kit, pay our building costs and give us in-kind support. We have a contract for services with them and we deal with all other aspects of running the museum. We have had some fundraising success locally as well as from the Heritage Lottery Fund and Awards for All and now have a sub group working on all aspects of generating income.

Being a museum

We want to work to professional standards as far as we can. We haven't yet decided whether we want to apply for Accreditation and anyway we haven't been operating long enough at the moment. Our collection is owned by East Lothian Council and comes under their collecting policy which is one issue we'd need to discuss first.

We are most proud of

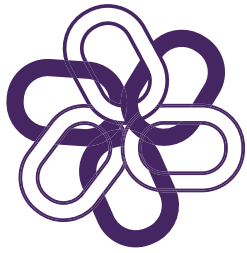
- Opening to our July 2013 deadline and welcoming 5500 visitors, many from the local area. That led to public demand for us to remain open during the winter. And doing it all in such a short space of time.

Our advice for others

- Get plenty of support from your community
- Take the time to work out where you want to go and plan ahead
- We are a good example of a community group working in partnership with the Council and would be happy to advise others



Find out more:
www.coastalmuseum.org



6.1 Creating a visitor attraction

What do your visitors expect of a museum?

When a visitor walks through your front door, they are choosing to come to your museum rather than going to the cinema, park, library, café, playground, shopping centre or going for a walk. You are competing for their leisure time so you must be confident that you can meet their expectations. Regardless of what facilities you provide, a smile and customer-focused service can transform their experience.

Running a museum means that you need somewhere you can welcome visitors. This can be a 'pop-up' space in a local library, leased rooms or buildings. Many museums choose to acquire their own property as this gives them greater security. Leasing a space or purchasing a building has legal and financial implications and should only be undertaken following robust business modelling. This is not recommended if you are an unincorporated organisation as trustees are jointly and severally liable for any financial loss.

If your museum is keen to own its own property, it might be worth considering whether there are buildings currently owned by a public sector body that could be transferred to your organisation. For a number of years, local authorities and other public sector bodies have been interested in transferring the responsibility for managing buildings to community organisations. This is

commonly known as Asset Transfer. In Scotland, community asset transfer has been explored as part of the Government's community empowerment agenda. It should be noted that liability for the building and responsibility for its upkeep may also be transferred.

How will visitors find you?

It is important to get external signage right. If your audience is mainly local people your job will be easier but your museum can still be overlooked. Consider signs on your building and on major routes to your museum. You may need to talk to your local planning department, especially for signage in a listed building or in a conservation area. Alternatively, think about putting location maps and directions on flyers, websites and via social media.

A range of facilities

Not everyone will have space for a shop and sometimes you might not want to take business away from a good local café. You have to provide the facilities that are right for you, your visitors, and fit in with the local area. If the best cup of tea is available next door then tell your visitors. This will leave you free to concentrate on other services that complement those of your neighbours.



Who do you need to involve?

- Front of house staff and volunteers are crucial to a positive visitor experience.
- Consider working with other museums to 'mystery shop' and collect regular feedback on your service.

In a nutshell: VisitScotland Quality Assurance Scheme

Many museums participate in this recognised standard as part of their quality assurance and marketing activities. Assessed by independent experts, there are five grades from 'Acceptable' to 'Excellent'. It is a paid-for service, with subscribers receiving a report with areas for improvement.

- Brochure/leaflet/website
- Brown and white tourist signposting
- Appearance of grounds
- Car park
- On-site signage
- Appearance of buildings
- Price display
- Staff welcome, attitude and efficiency
- Appearance of staff
- Accessibility of interior layout
- Décor/maintenance
- Cleanliness
- Visitor orientation
- Meeting needs of different audiences
- Interpretation/information

Checklist: Visitor experience

You do not have to offer everything, but what you do offer needs to be good, safe, and clean. Start thinking about how you can help everyone enjoy their visit. How would you answer the following?

- Are you easy to find?
- Are you open when people want to visit? How will they know?
- Does your site feel secure?
- Will visitors be dry and comfortable?
- What will visitors do with wet coats?
- Where are the nearest (clean) toilets including baby changing and accessible toilets?
- Where can visitors get refreshments?
- How will you welcome people to your museum?
- Is there a safe space for school groups or vulnerable people to have a break?
- Is there space for members of the public and academics to research your collection?



Legal requirements and standards

- [COSHH Regulations \(2002\) as amended](#)
- [Equality Act \(2010\)](#)
- [Health and Safety at Work Act \(1974\)](#)
- [VisitScotland Quality Assurance Scheme](#)

What to watch out for

- A bad experience drives visitors away more than a lack of facilities. Don't underestimate the value of a smile and welcome, or a properly resolved complaint
- Give visitors the opportunities to give feedback, for example through TripAdvisor or visitors' books. Remember to review comments and decide how to respond
- Asset transfer refers to buildings and not collections (which should remain the property of a local authority)
- Signposting to a good local café is better than providing a poor quality service yourself



Further information and resources

AIM (Success Guides: Successful Visitor Experience – Getting it Right)

www.aim-museums.co.uk/downloads/a4415601-b24a-11e2-b572-001999b209eb.pdf

Choices for Change (Community Asset Transfer)

www.choicesforchange.info/wp-content/uploads/2011/05/HD-Community-Asset-Transfer.pdf

Development Trusts Association Scotland

www.dtascot.org.uk

Kids In Museums

<http://kidsinmuseums.org.uk/>

Scottish Government:

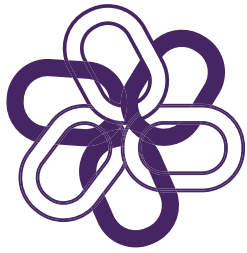
Community Empowerment

www.gov.scot/Topics/People/engage

VisitScotland:

Visitor Attraction Quality Assurance Standard

www.visitscotland.org/pdf/Criteria%20for%20Visitor%20Attraction,%20Castle,%20Museum,%20Historic%20House,%20Historic%20Attraction,%20GardenOct2013.pdf



6.2 Reaching audiences

Who goes to museums?

How to profile your users and what to do about it

You need visitors if your museum is to be a success. However, just as people support different sports clubs, not everyone will want to visit your museum. Understanding your visitors is vital – who they are, where they come from, their likes and dislikes. This can help you build a stronger museum that appeals to more people.

Who goes to museums?

This all depends on where you are and what you have. A major city museum with a large and diverse collection will have a larger pool of people to draw from than an isolated rural museum with a specialist collection.

When projecting how many visits your museum will attract it is very easy to overestimate. This can have serious consequences for the viability of your organisation. There are several data sources that will help when predicting how many people may come to your museum and in targeting promotional materials.

As a new museum you are entering a very competitive market and need to attract enough visitors. Scotland has a population of 5.3 million of which a third visit a museum or gallery at least once a year (32% [Scottish Household Survey](#), 2012). Your museum will be competing with well-established museums and visitor attractions for tourist and day visitors. These established

organisations have had time to develop their products and marketing yet only secure a small percentage of all visits ([Great Britain Day Visits Survey](#), 2012). It is well known that new entrants in an established market often find it difficult to attract and retain visitors. It may be that your museum is most likely to appeal to a modest number of local people or those enthusiastic about your collection.

Who will come to my museum?

Knowing who your visitors are will help you plan exhibitions, events and target your marketing activity. In your planning stage you could use local population data such as the [Census](#) to identify to the scale of potential audiences. Speaking with similar or neighbouring museums and attractions may also help you to estimate visitor numbers.

Once you are up and running, make sure you put systems in place to find out who is visiting your museum and to get some feedback on their experience. Monitoring visitor numbers through patterns of tickets sales, asking staff to informally identify types of people coming in (for example groups, couples, young, old), using Gift Aid postcode data to identify how far visitors are travelling, and carrying out visitor surveys are some examples. Whatever you decide to invest in, make sure you know what you want to do with the information. And then remember to set time aside to analyse it all and discuss your response.



In a nutshell: Marketing

Once you know who you are trying to attract to your museum you can work out how you want to promote it.

Thinking of each segment of your audience, consider the best way to reach them and how to communicate your message. Don't just focus on what you want to say rather than how. Your messages should be consistent, but different audiences need slightly tailored marketing approaches.

The 'four Ps' are a useful framework.

Product

- What is your museum?
- Why should someone visit you rather than another attraction or activity?
- Who do you provide your service to?
- What can you offer your visitor?

Pricing

- Who are you competing against?
- Are your prices competitive? Or are they a barrier to participation?

Place

- Where is your museum?
- Where do you provide your service?
- What else is available to this audience?

Promotion

- What are the most effective methods for communicating with your target audience? See MOSAIC Scotland
- Where should you promote to reach them?
- What budget and resources do you have?

Checklist: Promoting museums

Test which combination of activities will best promote your museum.

Advertising

- Prioritise editorial and news items in newspapers, magazines, on radio and television

E-marketing and emails

- Seek out free and competitively priced e-newsletter tools that will help your museum look professional. Remember to abide by the Data Protection Act – building your mailing list will take time and patience

Leaflets and flyers

- Make sure that these are professionally designed, printed and distributed. It is no use printing several thousand and leaving them in your museum office. There are also few things more off-putting to visitors than badly designed print

Public relations and media

- Work out what journalists want to hear about and get information to them. Building a strong relationship can help you in the medium term

The web (including web 2.0)

- Set clear guidelines for use of social media by staff. This helps communicate key messages in a timely manner, share responsibility for communicating and encourage wider public engagement
- Engage in conversations – especially with 'bad' reviews on sites like TripAdvisor. Remember to be proactive rather than reactive in all of your social media content. If you have to react to something, always try to do so from a positive perspective
- Think about what visitors want to hear, but start with the basics – make sure you tell people where you are and when you are open. You would be surprised how many museum websites make their own addresses very difficult to find!



Legal requirements and standards

- [Data Protection Act \(1998\)](#)

What to watch out for

- Overestimating how many people are interested in your museum and therefore over-predicting your visitor numbers
- When budgets get tight, don't cut back on your marketing activity to save money: keep your museum in the public eye
- If you are collecting personal information, you will need to abide by the Data Protection Act



Further information and resources

Arts Marketing Association

<http://www.a-m-a.co.uk/>

Association of Independent Museums: Designing and Implementing Visitor Research

www.aim-museums.co.uk/downloads/5aead5d8-dd76-11e1-bdfc-001999b209eb.pdf

Culture Hive

<http://culturehive.co.uk/>

Culture Republic

<https://www.culturerepublic.co.uk/>

Heritage Lottery Fund: Thinking about Audience Development

<http://www.hlf.org.uk/audience-development>

Information Commissioner's Office

<http://ico.org.uk/>

Museums Association: Museums Practice – Marketing

www.museumsassociation.org/museum-practice/marketing

Museums Galleries Scotland: Getting to Know Your Visitors

www.museumsgalleriesscotland.org.uk/research-and-resources/resources/publications/publication/232/getting-to-know-your-visitors

Museums Galleries Scotland: Marketing

www.museumsgalleriesscotland.org.uk/research-and-resources/resources/marketing/

Museums Galleries Scotland: Links to official statistics

www.museumsgalleriesscotland.org.uk/research-and-resources/research-and-evaluation/official-statistics/links-to-official-statistics/

Scotland Census

www.scotlandscensus.gov.uk

VisitScotland: Tourism Statistics

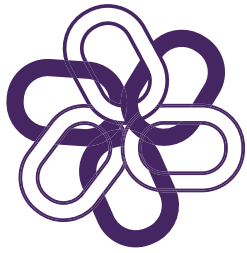
www.visitscotland.org/research_and_statistics/tourismstatistics.aspx

Scotland's Towns Partnership: Understanding Scottish Places

<http://www.usp.scot/>

MOSAIC Scotland

www.experian.co.uk/marketing-services/products/mosaic-uk.html



6.3 Communicating with visitors

Finding and telling stories through research and interpretation

Your museum will make its objects come alive through stories and storytelling. It is these stories that will draw visitors through your museum, capture their interest and make sure they remember you long after returning home. Happy visitors are more likely to come back and support your museum, whereas a dissatisfied or bored visitor is much more likely to tell others or put a bad review on social media.

Museums are places where visitors come to learn and be inspired.

Putting aside time to plan exhibitions so that you can communicate clearly and effectively with visitors will help ensure people get the most out of your entire site. It will also help everyone taking decisions about the museum to agree on the purpose of your exhibitions and take care that they are pitched at the right level for your visitors.

There are a few ways by which you can interpret your collection:

- Exhibitions with labelled objects and text panels
- Events involving visitors with collections or collections-related activities – from baking in a historic kitchen to a drawing table for children
- Live interpretation – through re-enactment or commentary
- Immersive experiences such as period rooms
- Digital elements, such as apps, interactives, touch screens, audio units, projected films, soundscapes

Very often with interpretation – simple is best. Sometimes far more work goes into a ‘simple’ display than a high tech experience. Wear and tear, ongoing running and repair costs are an important factor in this too.

The best starting point is to ask what your visitor wants. It is useful to remember that while good interpretation is accessible to all, it is often tailored to the needs of specific groups of people.



In a nutshell: Learning outcomes

Good interpretation uses our understanding of the way we learn matched with a recognised set of learning outcomes to create displays that communicate particular messages to the visitor.

Knowledge and understanding

- What kind of information (facts, messages, ideas) will visitors get and take away?

Attitudes and values

- What kind of attitudes, perceptions and opinions do you want visitors to develop about your subject?
- How will people feel during their visit?

Skills

- Following a visit, what kind of skills might people have developed?
- Are visitors encouraged to try new things?

Enjoyment, inspiration, creativity

- How do you help your visitors express their creativity?
- Are your displays or activities fun for visitors?
- How do you surprise and challenge your visitors?

Activity, behaviour and progression

- How do you want people to behave during their visit?
- What would you like your visitors to do (differently) as a result of their visit?

[Inspiring Learning for All](#)

Checklist: Developing good interpretation

- Change your exhibitions regularly – this is good for your collections and will be a reason for people to return
- Temporary exhibition spaces and open storage can open up access to collections and encourage new interpretation
- Visit other museums and attractions to get ideas
- Consider your objectives and your target audience. Then, decide on two or three guiding principles and key messages
- Base these messages on human stories
- Long text labels or panels aren't effective. Use labels, short texts, sound and images to convey your messages
- Remember, research suggests we will recall up to four messages or themes more easily than facts and figures
- Every object that is selected for display must work for its keep – so ask yourself, what does this object really contribute?
- Lighting can make all the difference. Check that your star objects are well lit
- Use object stands and wires to display objects to their best advantage
- If something breaks or is damaged, remove it straight away – visitors spot faults and remember them
- Go round your museum on your knees to see a 'child's eye view'! (This is also helpful for spotting health and safety issues)
- Capture visitors' responses to objects in your collections
- Digital and online solutions can allow those interested to add their stories and participate

What to watch out for

- Poor exhibitions consisting of objects in a case with a few tiny labels
- Plan for wear and tear and the need for repairs during an exhibition run
- Budget to renew permanent displays before they get too stale



Further information and resources

Heritage Lottery Fund

www.hlf.org.uk/HowToApply/goodpractice/Documents/Interpretation_Good_Practice.pdf

Museum of Inuit Art: How a small museum can create BIG digital projects

<http://www.edgital.org/tag/small-museum/>

Museums Association: Museum Practice – Text and labels

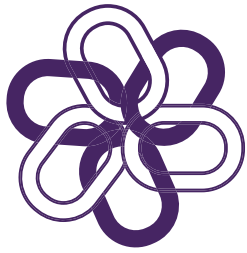
www.museumsassociation.org/museum-practice/text-and-labels

Museums Galleries Scotland: Introduction to Interpretation

www.museumsgalleriesscotland.org.uk/research-and-resources/resources/advice/publication/316/introduction-to-interpretive-planning

Scottish Natural Heritage: Interpretation resources

www.snh.gov.uk/policy-and-guidance/heritage-interpretation/



6.4 Formal and informal learning

How to reach out and engage with your communities

Learning is central to the activity of every museum as it delivers benefits to your visitors and your community. It includes both formal learning with schools and colleges and informal learning, which takes place often in family and friendship groups outside the formal education system.

Some museums focus on informal learning whereas others develop long-standing relationships with formal education providers, such as schools and colleges. Depending on your museum, you might use learning as a means of generating income, alternatively you might wish to use it as a loss leader as part of your charitable purpose. There is no right or wrong decision as long as you are clear why you are investing in learning – is it a charitable activity, for income generation or a mixture of both?

Who says that learning cannot be fun!

Museums are great places for informal learning as they provide a neutral, safe learning environment with people who are passionate about their subject. Your collections will inspire interest as they come from different eras and cultures. This makes it easy to associate a museum visit with fun, creative activity. *“A family visit with a happy child is a success for them. A visit with an unhappy, bored child is a failure.”*

Informal learning is the bedrock of museum activity and should be part of your everyday programming.

Very often, this is based around activities and workshops. This type of activity should have learning outcomes embedded alongside having fun. When successful, they encourage families and visitors (of all ages) to be more positive about learning in general and can boost participation in formal learning.

Is formal learning just primary school children?

Formal learning applies to people in education from nursery to university. If you cannot link your collections, exhibitions and learning resources to their curricula then you are unlikely to secure formal learning visits.

Most educational demand is for primary school children or lifelong learning groups. Other age groups tend to be involved through targeted project activity.

Attracting and retaining formal learning customers is hard work and is unlikely to generate profit for your museum. You should only engage with this market if you are committed to supporting formal learning because it enhances children's learning experience.



To explore this further, research how your museum fits with the curriculum. For the 3-18 age groups this is generally outlined in the Curriculum for Excellence. The Curriculum for Excellence offers pupils the chance to learn through experience – something museums are well placed to deliver. Your museum should be clear on how you can support the ‘four capacities’ and how you can link to specific elements of the eight curricular areas.

Most schools undertake educational visits to museums to meet the history, geography, and science curricula. With Higher Education, Further Education and through-life learning providers it is best to contact the organisations directly to understand how your work could fit with their programmes. At the other end of the spectrum, don’t forget early years learning providers working with the under-fives.

Who do you need to involve?

- It is worth considering whether you could deliver learning programmes in partnership with another organisation so that you can share expertise and capacity
- Build relationships and talk with teachers and local schools
- Find out how a visit to your museum might fit with the curriculum and their priorities – they may be able to spot connections and possibilities that you cannot
- Discuss what resources they might need to make the visit run smoothly and be a success



In a nutshell: Safeguarding

Museums are usually safe learning environments. Although it is very unlikely that your users will be exposed to exploitative individuals you must still make every effort to prevent this from happening. This is for your benefit as well as that of vulnerable individuals.

The Children (Scotland) Act 1995 places a duty of care on all those who work with children and young people. This means that your museum has a responsibility to 'do what is reasonable in all circumstances to safeguard the child's health, development and welfare.'

The same principle should apply to a wider category of people who are vulnerable due to age, life position, or medical condition. This relates to the Protection of Vulnerable Groups (Scotland) Act 2007.

If members of staff (including volunteers) are likely to be in charge of, or alone with, children or vulnerable adults your organisation might wish to apply for a 'Disclosure' document from Disclosure Scotland. In some instances, it can be a legal requirement for your organisation.

Due to the sensitivity of these matters, it is advisable to obtain professional advice about your approach.

Finally, if you handle Disclosure documents, your museum must think how it manages access to them in compliance with the Data Protection Act.

Checklist: Attracting learners

Informal learners

- Have 'layers' of information so that people can take in as much or as little as they choose
- Remember that families often visit in groups – think how you can encourage conversation between generations
- Offer a range of activities – think about talks, activities or a workshop programme to complement your displays and exhibitions
- Make sure your environment is comfortable for people to stay as long as they like – think about chairs, refreshments and toilets

Formal learners

- Think around the curriculum – your museum might have a perfect history subject but teachers have more time allocated to numeracy and literacy
- Learning outside the classroom can bring a new dimension to schools – familiarise yourself with the benefits of this and be clear about how you can add value
- Make sure you can cope with a class visit – do you have adequate toilets, somewhere they can put their coats and bags and eat their lunch, a separate space?



Legal requirements and standards

- [The Children \(Scotland\) Act 1995](#)
- [Protection of Vulnerable Groups \(Scotland\) Act 2007](#)
- [Data Protection Act \(1988\)](#)

What to watch out for

- Distances further than walking distance or a 30-90 minute drive are problematic for schools, as is funding for travel
- You don't need to have a 'handling collection' for learners. You can use your collection providing you understand the conservation implications
- Groups can be noisy. Having a specific education area creates a safe space, helps manage noise and provides a lunch venue for groups to eat in
- Learning activities may need access to water and sinks



Further information and resources

Disclosure Scotland

www.disclosurescotland.co.uk

Education Scotland: Community Learning and Development Strategic Guidance

<http://www.educationscotland.gov.uk/communitylearninganddevelopment/about/policy/strategicguidance/index.asp>

Engage Scotland

www.engage.org/engage-scotland

Group for Education in Museums

www.gem.org.uk

Heritage Lottery Fund: Learning

<http://www.hlf.org.uk/learning-guidance>

Inspiring Learning for All

www.inspiringlearningforall.gov.uk

Museums Galleries Scotland: Guide to Curriculum for Excellence

www.museumsgalleriesscotland.org.uk/research-and-resources/resources/publications/publication/79/guide-to-curriculum-for-excellence

Museums Galleries Scotland: Learning and Access

www.museumsgalleriesscotland.org.uk/research-and-resources/resources/learning-and-access/

Scottish Government: Early Years Framework

www.scotland.gov.uk/Publications/2009/01/13095148/0

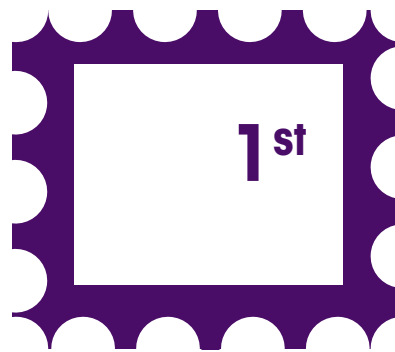


The Big Question: Do you have enough satisfied visitors?

One of the most common reasons museums are not successful is over optimism when estimating how many people will visit and not providing a good enough experience to attract return visits.

The next step helps you ask the critical questions to help you determine whether your visitor services and offer mean you are a sustainable museum.





DEVELOPING AND CARING FOR COLLECTIONS

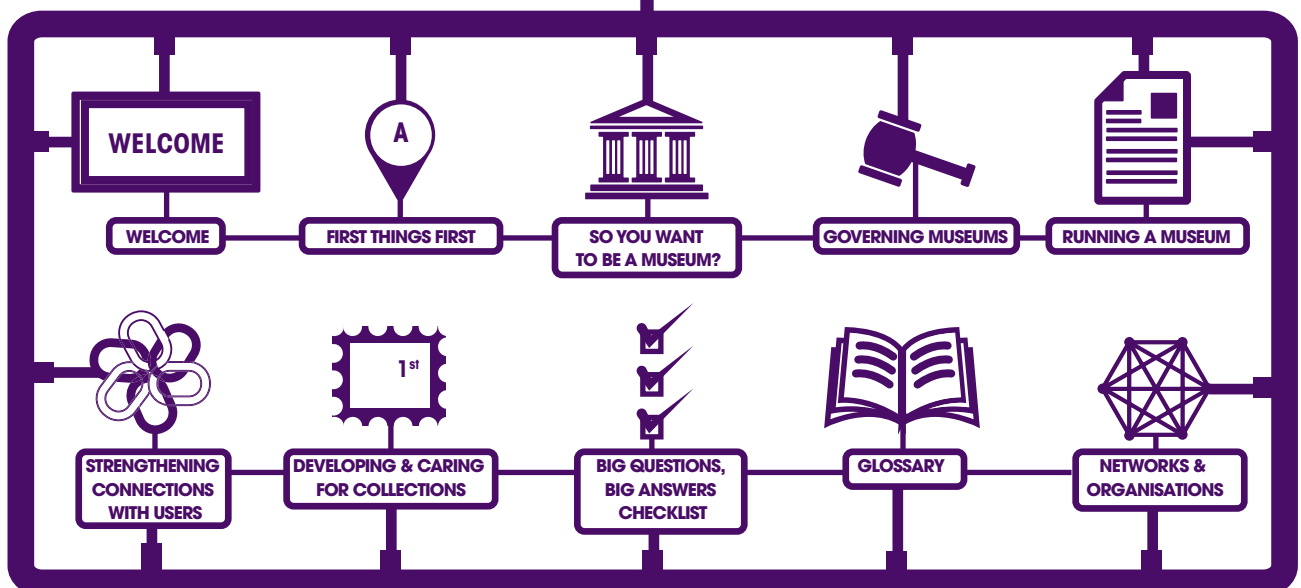
CASE STUDY: ART IN HEALTHCARE

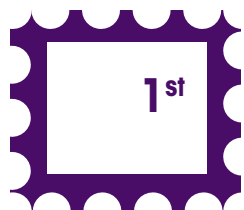
7.1 Effective collecting

7.2 Managing collections

7.3 Caring for your collections

7.4 Digital collections





7. Developing and caring for collections

Collections – whether social history, industrial, fine art or decorative artefacts, natural history specimens or oral histories are at the heart of museums. Objects provide tangible connections to stories and material evidence of the past. Their sheer physical presence brings history to life in a way unlike any other. To realise their full potential they need careful management.

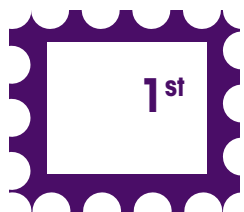
Museums are not storehouses of everything. They need to be clear about what they will and won't collect so they do not waste resources (or public money) in competing with others.

To make best use of your resources you need to know what you have, where it comes from, where it is within your museum and how you will review it.

Most artefacts start deteriorating from the day they are made. It is the responsibility of museums to take care of them so that this is not accelerated – so that future generations may enjoy them.

Keeping on top of managing your collections matters because:

- Collecting and managing collections uses resources, even if the item is donated. Even if you are volunteer-run, there is a cost to document, look after and store things. Therefore make sure you are spending your time, money and energy only on those things that help you fulfil your stated purpose.
- Some kinds of collection material need very specific and sometimes expensive facilities to properly display and store them.
- People who donate their valued objects expect museums to look after them forever (or in perpetuity).
- To create exhibitions you need to know the stories behind your collections.



Case Study: Art in Healthcare

Art in Healthcare works to enliven healthcare settings through the provision of original, contemporary Scottish art. It is a Scottish Charitable Incorporated Organisation, but not yet an Accredited museum.

Art in Healthcare's key asset is its collection. They have over 1500 original artworks, most of them on display in healthcare settings such as hospitals and care homes. This provides patients, staff and visitors with colourful, stimulating and more human spaces.

In their own words

We started life as Paintings in Hospitals Scotland in 1991, encouraged and funded by Paintings in Hospitals (London). After 6 months, we became an independent Trust. Our collection went from strength to strength as we acquired new items from studios, degree shows and donations, always with an emphasis on quality.

Following a major review, Art in Healthcare came into being under that name in 2005 when we combined with our Friends organisation. We have continued to grow and care for our collection and also want to broaden our reach through exciting outreach programmes, new technology, partnerships and more volunteers.

We believe that art helps to produce a stimulating environment that improves people's mental wellbeing, contributing to a more effective healing process. We also run outreach workshops, facilitated by professional artists, using paintings from the collection to inspire people, for example people with dementia, to produce their own work.

Finance

We are lucky to have a diverse range of income streams with much of our funding coming from trusts and foundations, rental income, donations and contracts such as managing local National Health Service art collections. However the financial climate is having an effect, with National Health Service income going down and increasing competition for grant funding. We are currently exploring new ways of earning our own income.

Being a museum

Our wonderful collection of Scottish and Scotland based art is one of the largest contemporary collections in the country. It is held in high regard – so much so that one day it could be a nationally recognised collection. But first we need to become an Accredited museum and are exploring the feasibility of that.

Decisions on accessioning artworks to our Collection are taken by our Art Advisory Panel which currently consists of our Director, our Collection Manager, our Honorary Curator and an artist. When considering artworks for accession into our Collection we look at the quality of the work, its appropriateness and relevance to the healthcare environment and different user groups plus display practicalities. The overall balance of the Collection is also a very important factor.

Our collection is catalogued and documented in diverse ways, including through our website, an Access database and Excel spreadsheets. We would like a proper collections management system to bring everything into line and be able to fully understand the potential of our collection.



We are most proud of

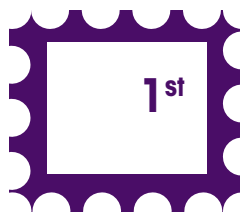
- Our collection! We now have over 1500 items with almost two thirds of them out on display.
- We are becoming more widely known, being offered more donations and attracting new volunteers with valuable skills.



Find out more:
www.artinhealthcare.org.uk

Our advice for others

- Don't leave it as long as we have to get to grips with your collections management.



7.1 Effective collecting

Deciding what to collect and how to go about collecting

Our fascination with objects and their stories brings to life the past in a unique way. Museums are offered all sorts of material, sometimes because their owners have no further use for them or want to get rid of them. It is important that your museum's collection is shaped by objects that help tell the stories you want.

Active decision making in collecting will ensure you don't take in more objects than you have the capacity to look after. Whether your passion is for oral history, film, fine art, natural history or manufactured goods, make sure you acquire the right examples. Try not to create backlogs and don't clutter up your shelves with objects in poor condition.

Items are collected for their historical or social value rather than financial. However this does not mean that there is no cost in adding them to the collection, as resources are needed to ensure their long-term care and display.

Acquisitions should be made in accordance with a clear policy, often referred to as a 'Collection Development Policy' or 'Acquisition and Disposal Policy'. This sets out your collection priorities in the context of your own museum and those of neighbouring museums. It should also take into account the legal obligations and ethical considerations in both acquiring and disposing of collection items.

Museums can be publicly criticised for having a large proportion of their collections in storage. However, objects can be in store for a number of reasons, including preservation, for example if they are fragile. It is important that those involved with your collection understand and can explain why objects are in storage rather than out on display.

Who do you need to involve?

- Consider whether collection and disposal decisions can be made by a nominated group of trustees and staff, perhaps as a regular agenda item in your governing meeting
- Neighbouring museums will also be collecting. Discussing your plans with them will ensure you are not competing for items
- Maintaining good contact with donors can assist with any future questions about the item. Don't forget to tell them about other events and initiatives – and perhaps they might consider sponsorship or legacy funding
- All volunteers and staff should know not to accept any item without completing a receipt with the owners contact details (Object Entry form). This will ensure you don't end up with orphan items that you can neither acquire nor discard

**In a nutshell:****Obtaining legal ownership**

Obtaining title is the legal transfer of ownership to the museum and must be recorded appropriately. For absolute clarity this document must contain:

1. Formal name of the organisation acquiring the object (your museum)
2. Name and address of previous owner
3. Brief description of object
4. Signature confirming transfer of title
5. Method of acquisition (e.g. purchase, donation)
6. Assignment of rights associated with the object (e.g. Copyright)
7. Relevant clauses to ensure compliance with the Data Protection Act and Freedom of Information Act legislation (e.g. how personal data will be held)
8. Obtain appropriate supporting documents (Bequests – a copy of the Will and confirmation of probate, Purchases – a signed statement confirming the vendor is the owner, provenance of the object, original invoice and receipt, Grant aid received)

[SPECTRUM Acquisition Procedure](#)

Checklist:**Making the decision to acquire**

- Why do you want it?
- How will you use it?
- What history and stories can you collect alongside it?
- How much will it cost to document, store, display and conserve?
- Do you have room for it?
- Would another museum or organisation have better use for it?

Practical alternatives to accepting an item into your collection

- Use it in a handling collection – this gives visitors the opportunity to touch and hold an item, but places it at greater risk of damage
- Take a copy of the original item (e.g. scan a photograph and obtain a license to hold and use the image)
- Signpost to a neighbouring museum whose collecting policy is more relevant



Legal requirements and standards

- [Museums Association Code of Ethics](#)

What to watch out for

- Is your museum a treasure house or a storage locker? Make sure you only acquire items that have value to you
- Just say no! Not wanting to offend someone is not a good enough reason to acquire something that you have to look after in perpetuity
- Make sure anyone accepting an item takes the contact details of the owner. Items left with no details are in limbo – hindering acquisition or disposal
- Understand the difference between receiving an item at the museum (object entry) and legally acquiring it
- Put in place any permissions you need at the time of collection, this especially applies when recording oral histories



Further information and resources

Collections Link: Collections Development Standards

<http://www.collectionstrust.org.uk/collections-management/collection-skills/standards-toolkit/item/13654-collections-development-standards>

Lord: Forward planning and the cost of collecting

www.lord.ca/Media/Artcl_ForumPlanningCostofCollecting-GL.pdf

Oral History Society: Is your oral history legal and ethical? – practical steps (includes consent forms)

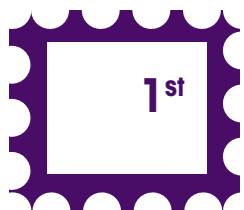
<http://www.concernedhistorians.org/content/files/file/ET/187.pdf>

Museums Galleries Scotland: Active collecting and acquisition

www.museumsgalleriesscotland.org.uk/research-and-resources/resources/collections-development/active-collecting-and-acquisition/

Subject Specialist Networks

<http://www.collectionstrust.org.uk/collections-link/museum-development-support/subject-specialist-networks>



7.2 Managing collections

Knowing what you have and where it is

Being able to account for all the items in your care, whether owned by you or on loan, is a fundamental responsibility of a museum. You need documentation to show you what each object is, where it came from, its condition and current location.

Dealing with collections management paperwork in a timely manner will help you meet this responsibility and avoid backlogs. Yet so many museums fall into the trap of acquiring things faster than they can process them, quickly building up a backlog that will take years to remove. Setting up a new museum means that you can get it right at the outset.

Processing

Initial processing consists of

- Object entry – recording basic details about the item and where it has come from
- Marking and labelling – giving it a number and securing this to the object
- Location – recording where it is stored

Digital cameras have transformed collections management. Photographing the item can be very useful for reference and also bringing catalogues and online resources to life.

Capturing knowledge

Capturing more information about the object can be done at the same time as the initial entry, or at a later stage.

Cataloguing the object should record when it was made and used, what it is made of, how it was used, and by whom. To make this easily searchable it is important that you are consistent in the data structure and terminology you use.

Paper or digital system?

While it is perfectly possible for all these systems to be paper-based, you would be missing out considerably on the power of computers to store, search and retrieve information.

There are many collections management and cataloguing systems available ranging from community-focused open-source databases to large-scale solutions. The Collections Link website has a free online service to compare the features of leading collections management systems, helping you to find the right software.

While these are designed to meet museum needs and standards, don't delay documenting while you decide what to buy. A well-structured Excel spreadsheet is adequate for small collections and will allow you to transfer the data to a purpose-built collections management system in the future.



Who do you need to involve?

- Documentation often falls to the person with a computer, or is handed to a succession of volunteers or placement students. Therefore make sure you have a documentation procedural manual to maintain quality and consistency.

In a nutshell: SPECTRUM Procedures

SPECTRUM is 'an open, freely-available standard developed through a collaboration of 300 museum professionals'. SPECTRUM Procedures give a step-by-step guide to the main management processes in a museum. The basic procedures are:

1. Object entry
2. Acquisition
3. Location and movement control
4. Cataloguing
5. Object exit
6. Loans in
7. Loans out
8. Retrospective documentation and making an inventory

Legal requirements and standards

- [SPECTRUM: the UK Museum Collections Management Standard](#)
- [Code of Practice for Cultural Collections Management \(PAS 197: 2009\)](#)

What to watch out for

- It is very easy to lose control of your collections. Backlogs are difficult to get rid of – make sure you keep on top of basic documentation
- Homemade data management systems are better than nothing, but they are likely to cause problems in the long-term, for example when someone else takes over their management

Checklist: Basic information to record

- Unique identification number
- Object name
- Description
- Location
- Donor/owner
- Copyright status
- Associated information
- Date acquired
- Subject/keyword



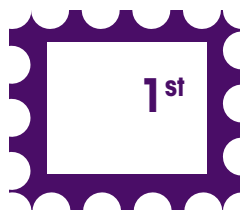
Further information and resources

Collections Link: Marking and labelling

http://www.collectionstrust.org.uk/images/documents/c1/a453/f6/Labelling_and_Marking_booklet.pdf

SPECTRUM Documentation Standard

http://www.collectionstrust.org.uk/images/documents/c1/a811/f6/spectrum-3-2_copy_for_publishing.pdf



7.3 Caring for your collections

Ensuring your collections stay in good condition

Objects start deteriorating from the time they are made. What they are made of, how they were made and how they were used over their lifetime affects how quickly they deteriorate. Keeping objects stable and slowing down this deterioration is the challenge for museums as they try to preserve their collections for future generations.

Factors that accelerate deterioration are:

- Dust and dirt
- Light
- Extreme fluctuation in temperatures
- Very dry or very damp conditions – high or low relative humidity
- Pests
- People

Most collections care can seem common sense, but it also requires thought and basic technical understanding. We cause the most damage to our collections through careless handling or misguided actions.

Key areas to consider are:

- How you handle objects
- Storage and display conditions
- Emergency planning

Who do you need to involve?

Anyone with some training, the right materials and basic equipment will be able to undertake regular house-keeping that will help preserve your collections. A qualified conservator should be used for remedial conservation to stabilise an item. Restoring an item to its original condition is generally not undertaken as it conceals the object's history. The Institute of Conservation has a list of contacts.



In a nutshell: Environmental monitoring

Deterioration can be minimised in a clean stable environment with a cool temperature and consistent relative humidity. Light damage is cumulative – controlling exposure (measured in Lux) will minimise damage.

Guidance on this varies according to the material.

- Display cases protect items from damage by people. They create micro-climates which can either improve stability, or, for example with the wrong lighting, exacerbate fluctuation.
- Instruments to monitor the environment and light levels can help you to minimise fluctuation and exposure, for example by controlling the heating, or installing a dehumidifier or blinds.
- Pests, such as moths or carpet beetles can damage collections. Monitoring and regular cleaning of stores and displays should ensure that problems don't arise

Checklist: Basic care and handling

- Think about how to lift, support and move an object – this is the first step to protecting it (and yourself). Most materials benefit from you wearing gloves so that the oils and dirt found on skin don't cause damage
- Identify easily accessible storage space for your current collection with enough room to expand
- Keep storage areas clean and monitored – this increases your chance of spotting signs of damage – such as pest infestations, damp or water ingress
- Keep storage spaces cool, dark and dry
- Use conservation-grade packaging materials, such as acid free boxes to protect items and minimise handling
- Think before you do anything. Look for training and, if in doubt, ask
- Plan how you will rescue your collection in the event of flooding or fire

Legal requirements and standards

- [Benchmarks in Collections Care](#)
- [Code of Practice for Cultural Collections Management \(PAS 197: 2009\)](#)

What to watch out for

- Seemingly benign materials may be hazardous. For example artefacts from the 1930s such as ironing boards often contain asbestos
- Never use sellotape or laminate fragile documents – this causes more damage.
- Day to day household techniques and materials may not be appropriate for more delicate items
- Don't leave items stacked up or anywhere – they could be accidentally damaged
- Remain alert to the risks of intentional damage, such as vandalism or theft



Further information and resources

Benchmarks in collections care

<http://www.collectionstrust.org.uk/benchmarks-in-collections-care-resources>

Collections Trust Security Resources

<http://www.collectionstrust.org.uk/collections-link/risk-management/security>

Institute of Conservation

www.icon.org.uk

Museums Association: Emergency Planning

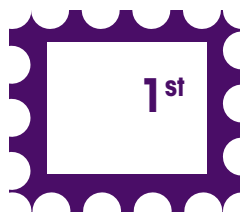
www.museumsassociation.org/museum-practice/emergency-planning

Museums Galleries Scotland: Caring for collections – Basic advice sheets

www.museumsgalleriesscotland.org.uk/research-and-resources/resources/collections-development/caring-for-collections/

National Trust Manual of Housekeeping (2005) Available from bookshops and the National Trust website

<http://shop.nationaltrust.org.uk/manual-of-housekeeping/p236>



7.4 Digital collections

Managing and future proofing digital content

Many museums are interested in digitising their collections, providing worldwide access to their contents at any time of day or night.

Technology and how we use it continues to evolve, for example we now use mobile phones to browse the web and check emails in ways not thought of a few years ago. In 2012, 31% adults had visited a museum or gallery website, almost double the level in 2006 ([Taking Part](#)). Most people want to find out about tickets, opening times or special events. However, a fifth of users visited in order to look at items from a collection. Digital engagement in museums is an exciting opportunity.

Digital engagement is more than just putting collections online. It has been demonstrated that putting collections online is more likely to increase visits rather than remove the need for visiting. But patterns of demand are still not clear. So while digital engagement is an exciting opportunity, you need to make sure you don't invest a lot of time in creating and managing resources that only a few people use.

There are two main approaches:

- Digitising a few things in depth and promoting key themes or objects. This works well if your aim is developing an outreach or learning resource. More themes can be added over time
- Digitising everything, with a minimal amount of detail. This is more likely to appeal to specialist researchers. More details can be added over time

Putting good systems in place from the outset will make it more straightforward should you choose to digitise more resources later on.

The key issues are:

- Being clear about what you want to achieve and what level of investment is needed
- Choosing the right system to manage all the information
- Understanding copyright and intellectual property rights



Who do you need to involve?

Collaborative projects means you can use others' platforms to make sure your online collections can be used by more people in more ways, for example SCRAN or the Culture Grid. This means your objects will sit alongside those held by National Museums Scotland and organisations across Europe. And their information will be made accessible through

- International services e.g. Europeana
- Open Government services e.g. data.gov.uk
- Search engines e.g. Google
- Broadcasters e.g. BBC, Channel 4

People outside your organisation with creative digital skills can re-use and re-purpose your digital assets (data, photos, sound, collections information) in all sorts of imaginative ways. Think of establishing relationships with creative digital people to explore what you have and what they could do with it, and be open to experimentation.



In a nutshell: Copyright

You may own the physical objects but still not have the right to reproduce or distribute photographs of your collection. This is due to Intellectual Property Rights – part of the law that governs intangible assets such as copyright.

These rights can be bought, sold, hired out, bequeathed, and owned. They last for a specific number of years. They apply to the web because everyone using the internet is a real person living in a country, and each computer is in a defined place and subject to local laws.

The types of asset that could be subject to restrictions include:

- Photographs of objects
- Documentary and fine art photographs that are part of your collection
- Digital images supplied by third parties, such as those used in exhibitions etc.
- Photographs of staff and visitors

It is important that you know whether you own the rights (i.e. they are assigned to you or you created the content yourself), have been granted permission (license) to use them or whether IPR has expired.

You can avoid problems by addressing copyright as part of the process of acquiring any objects or commissioning photographs

Checklist: Digitising collections

Digital access to your collections is more about collections management than marketing. It involves creating a resource that can be used by learners or researchers.

The starting point is entering information in your database in a consistent way. This will determine how searchable and reusable it is.

The next step is making your collections database information, with or without images, accessible online.

If you are making your collections available online, a mobile compatible website is essential for engaging the increasing number of mobile-savvy people.

Managing your digital collection could become as important as your physical one and requires a considerable amount of thought and attention.

Legal requirements and standards

- [Copyright, Designs and Patents Act \(1988\)](#)
- [Copyright and Related Rights Regulations \(2003\)](#)

What to watch out for

- Designing your own tool or creating a separate digitisation image database is not usually recommended – it may seem cheaper than a SPECTRUM compliant one, but is unlikely to be cost effective in the long run
- Scanning images or documents at the highest resolution possible and storing them in a stable and open file format will help future proof your digitisation
- Don't forget to make regular 'back ups' of your database and digital resources

Further information and resources

Collections Link: Digital Benchmarks

<http://www.collectionstrust.org.uk/item/1608-digital-benchmarks-for-the-culture-sector>

Collections Trust: help with copyright

<http://www.collectionstrust.org.uk/collections-link/going-digital/copyright-and-licensing>

Creative Commons: Digital rights management

www.flickr.com/creativecommons/

Wikimedia Foundation

<https://wikimediafoundation.org/wiki/Home>

Culture Grid

www.culturegrid.org.uk

Heritage Lottery Fund: Using Digital Technology in Heritage Projects

www.hlf.org.uk/HowToApply/goodpractice/Pages/UsingDigitalTechnologyinHeritageProjects.aspx#.UwB9nPdFDIU

Museums Galleries Scotland: Sharing and reusing collections data

<http://www.museumsgalleriesscotland.org.uk/research-and-resources/resources/collections-development/sharing-collections-information/sharing-and-reusing-collections-data/>

SCRAN

www.scran.ac.uk

Yorkshire Museum Development: IPR and Cultural Assets Advice Sheets

https://docs.google.com/folder-view?pli=1&id=0Bx_M1cS1YkDyck1weFNlaDN-0WEk&tid=0Bx_M1cS1YkDyYWo2dFVNM0R0U00



The Big Question: Are you collecting for the future?

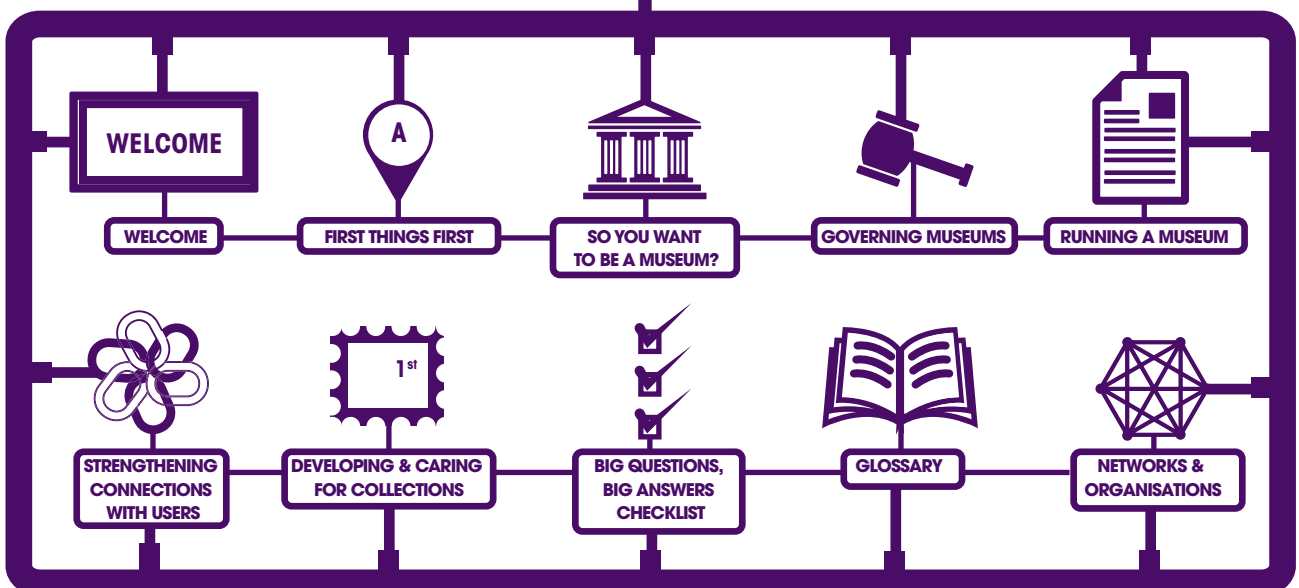
Managing collections is a central component of a museum's work. Yet many organisations do not set aside enough resources to invest in understanding and caring for their collections.

The next questions are intended to let you determine whether you are taking the responsible steps in owning, preserving and managing collections.





BIG QUESTIONS, BIG ANSWERS CHECKLIST





Big Questions, Big Answers checklist

Museums Galleries Scotland's long-established set of questions to help you to see whether or not you have considered all the implications of setting up a new museum have been updated.

This section brings together the challenging questions from each section of the Toolkit. You can use it as a checklist to keep track of the decisions you take and monitor your progress.

Museums operate in an increasingly competitive environment. Yet people still come forward wishing to turn their passion into a museum. Museum Galleries Scotland wants museums to thrive. In order to succeed museums must be relevant to their audiences, able to secure enough income to pay the bills and keep on developing with support from a wide range of stakeholders. Museums are not easy to run. In establishing a museum you are not just taking on responsibility to manage a business now, but also committing to ensuring that the collections survive for future generations. Before embarking on a project of this scale ensure you are aware of the challenges you will meet along the way.

The aim of the exercise is to find out how far your preparations towards a new museum have progressed. It is best undertaken as a group with somebody keeping note of any points that arise from the discussion. Don't worry if you find that you are ticking lots of 'don't knows'. Your answers will help you identify where you need to invest your time and resources so that your organisation can become a sustainable museum. Revisit and review your answers on a regular basis as you develop your museum.



| | Yes | No | Don't know |
|--|-----|----|------------|
| The Big Question: Is a museum the answer? What is the best model for you? Section 2 | | | |
| Do you have a collection? | | | |
| Do you have a display space? | | | |
| Do you have an audience? | | | |
| Are you committed for the long-term? | | | |

If you have a collection and a space to display it and have an audience in mind and intend to do this for the long-term (beyond your lifetime), a museum may be an appropriate model.

If you have answered 'no' to any of these questions, a museum is unlikely to be the best choice for you at this point in time. Look at the alternatives and follow the signposts to the other bodies that could support you deliver that choice.

| | Yes | No | Don't know |
|---|-----|----|------------|
| The Big Question: Do you exist for the good of society? Section 3 | | | |
| Will you invest any surplus in the organisation (i.e. not generate a profit that will be distributed to directors or shareholders)? | | | |

| | Yes | No | Don't know |
|---|-----|----|------------|
| The Big Questions: Are you well governed? Section 4 | | | |
| Does your governing document give you the powers to operate a museum? | | | |
| Have you identified how your museum contributes to local plans or national agendas such as <i>Going Further: The National Strategy for Scotland's museums and galleries</i> ? | | | |
| Can you clearly describe the purpose of your museum – its mission, strategic goals and values? | | | |
| Do you differ from other organisations in your local area or subject specialism? | | | |
| Have you the support of key stakeholders and are you communicating effectively with them? | | | |
| Are you registered with all the appropriate regulatory organisations? | | | |



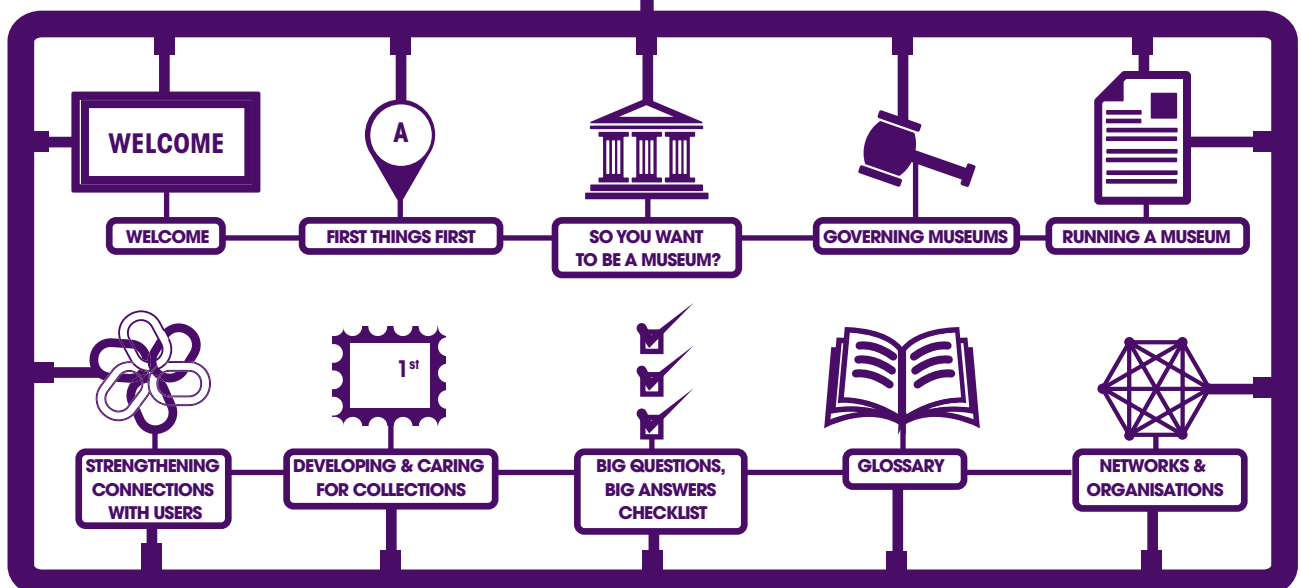
| | Yes | No | Don't know |
|--|-----|----|------------|
| The Big Question: Do you have a viable museum business? Section 5 | | | |
| Do you have a business plan that covers all of your activities and costs and suggests that you could generate a surplus? | | | |
| Have you identified several different sources of income? | | | |
| Can you attract enough volunteers with the right range of skills to deliver the full range of the museum's activities? | | | |
| Have you addressed your obligations under equalities legislation? | | | |
| Do you regularly review your progress and update your plans when things change? | | | |

| | Yes | No | Don't know |
|--|-----|----|------------|
| The Big Question: Do you have enough satisfied visitors? Section 6 | | | |
| Have you evidenced how many visitors you might attract and whether this is enough to be sustainable? | | | |
| Do you have an attractive, accessible space for collections display and visitor activities? | | | |
| Have you analysed who is likely to visit your museum and targeted your marketing at them? | | | |
| Does your planned interpretation encompass the various learning styles of your visitors? | | | |
| Are your learning programmes (if any) relevant to subjects taught in your local schools or colleges? | | | |

| | Yes | No | Don't know |
|---|-----|----|------------|
| The Big Questions: Are you collecting for the future? Section 7 | | | |
| Does your organisation intend to own collections in perpetuity? | | | |
| Do you have a Collections Development Policy approved by your Trustees? | | | |
| Have you implemented a SPECTRUM-compliant and systematic approach to recording information about your collection? | | | |
| Do you have the resources and access to the expertise to care for the sorts of materials in your collection? | | | |
| Have you identified procedures to manage your digital assets and associated intellectual property rights? | | | |



GLOSSARY



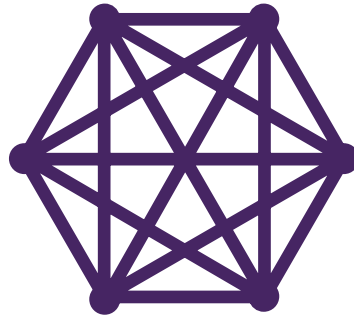


Glossary

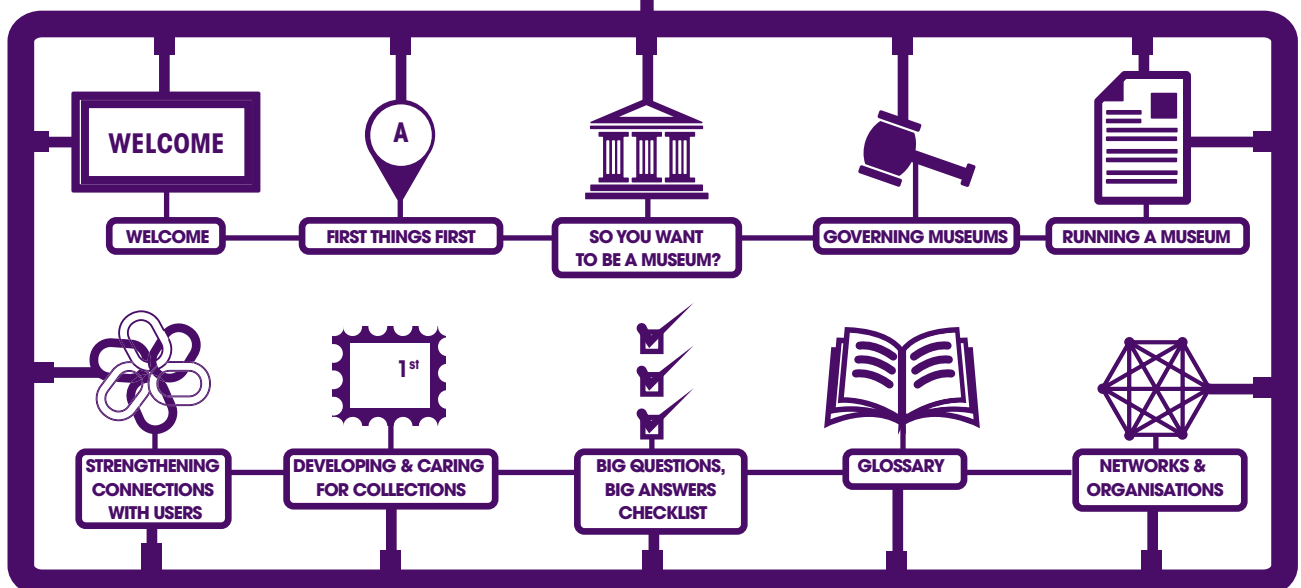
| | |
|-------------------------------|---|
| Accreditation Standard | The Accreditation Scheme sets nationally agreed standards for museums in the UK. Also known as Museum Accreditation. |
| Acquisition | Formal procedure agreeing to add an item into the museum collection. |
| Archive | A place or collection containing records, documents, or other materials of historical interest. |
| Audience | All those interested in visiting your museum or taking part in its activities. Also referred to as user or visitor. |
| Business plan | A formal statement of your goals and the activities and resources needed to reach them. Also known as Forward Plan, Corporate Plan, or Strategic Plan. |
| Collections management | Activities to ensure collections are secure, well cared for and all accompanying information about individual artefacts remains linked to them. |
| Community | Within the Toolkit we use this to mean a group of people who live in the same geographical area or a group of people with shared interests. |
| Conservation | This can refer to general care of collections – making sure objects are clean and stable – this is also known as preventive conservation. It also refers to actions taken by conservators to repair damaged items – also referred to as remedial conservation. |
| Digitisation | The process of making an electronic copy of a document or photograph, for example by scanning. |
| Documentation | The process of recording information about items in your collection, including what your objects are, where they came from and how and where they are stored. |
| Gallery | A non-commercial gallery displays works of art in the same way that a museum displays artefacts and specimens. Often the terms ‘museum’ and ‘gallery’ are used interchangeably. For the purposes of the Toolkit, we have used ‘museum’ to refer to a museum or gallery. |
| Governing body | The group of people who are responsible for the effectiveness and accountability of your organisation. If you are a charity these people may be called trustees or board of directors. |

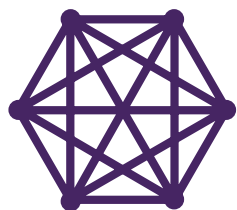
Glossary continued

| | |
|---------------------------------|--|
| Governing instrument | The legal document that establishes your organisation, defines your purpose and how you will operate. For example Memorandum of Understanding and Articles of Association. |
| Heritage organisation | An organisation with an interest in preserving and promoting the natural or cultural environment, history, customs and traditions of a place. In practice some museums call themselves heritage centres and vice versa. |
| Museum | An institution that cares for a collection of artefacts and other objects of scientific, artistic, cultural, or historical importance and makes them available for public viewing through permanent or temporary exhibitions. |
| Museum Mentor | Qualified museum professional who volunteers to support small or volunteer-led museums, usually in their local area, in Museum Accreditation. |
| Organisation | We have used this as a broad description for your group; in practice it could mean a museum, charity, company or unincorporated association – or a combination of these. |
| Organisational health | The Accreditation standard expects museums to be responsible, responsive and resilient and will look at all aspects of how your business is constituted and run. |
| Single Outcome Agreement | An agreement between the Scottish Government and each council, which sets out how each will work towards improving national outcomes for local people in a way that reflects local circumstances and priorities. |
| Stakeholder | Anyone who has an interest or concern in your museum. It includes your users, staff, volunteers, trustees, funders and wider communities. |
| Surplus | Once running costs are covered, any additional income is a surplus. Running a museum is a business, even though any surplus will be reinvested in the business and not be taken out as profit. |
| User | Anyone who visits your museum or website or who takes part in any of your activities. |



NETWORKS AND ORGANISATIONS





Networks and organisations

The museum sector has a strong ethos of collaboration and cooperation. We've selected a range of local, national and international organisations we think you will find useful. Some of these require registration or membership to benefit from their full offer.

Association of Independent Museums

www.aim-museums.co.uk

Collections Trust

www.collectionstrust.org.uk

Development Trusts Association Scotland

www.dtascot.org.uk

Federation for Small Businesses

www.fsb.org.uk/scotland

International Council of Museums – UK

<http://uk.icom.museum/>

Museums Association

www.museumsassociation.org

Museums Galleries Scotland

www.museumsgalleriesscotland.org.uk

Scottish Museum Federation

www.scottishmuseumsfederation.org.uk

Scottish Council for Voluntary Organisations

www.scvo.org.uk

Local forums

There are many local or subject-based forums providing advice and support. In the Highland Museums Forum, for example, thirty museums work together to sustain, develop and promote their museums. Similar networks exist all over Scotland. Some local authorities also have dedicated staff who support local museums. The best place to find out more is to contact your neighbouring museums:
www.museumsgalleriesscotland.org.uk/scotlands-museums/

Scottish Museums Federation

www.scottishmuseumsfederation.org.uk

National Museums Scotland: Professional networks

<http://www.nms.ac.uk/about-us/services-and-expertise/support-and-training-for-museums/>