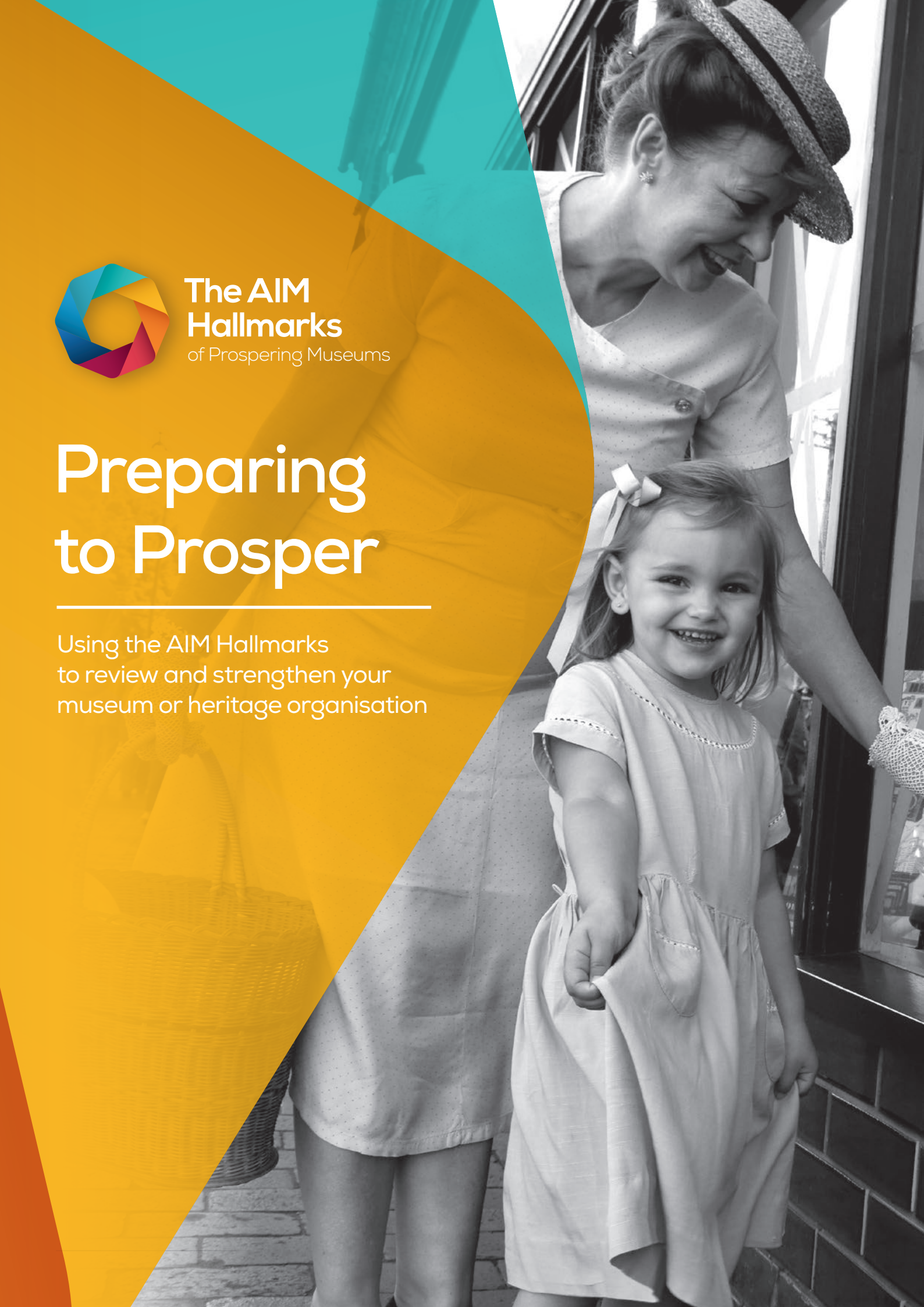




**The AIM
Hallmarks**
of Prospering Museums

Preparing to Prosper

Using the AIM Hallmarks
to review and strengthen your
museum or heritage organisation



The AIM Hallmarks of Prospering Museums

Many museums look quite similar on paper – in terms of their size and scale, their income and visitor numbers. Yet some stand out as thriving, full of energy and ideas and with great connections to their audience and the wider community. The AIM Hallmarks capture the range of factors that make the difference and help museums to prosper.

Since they were first published in 2015, AIM has worked with museums and heritage organisations across the UK to put the ideas in the Hallmarks into practice. Although a museum might sometimes choose to focus on one Hallmark for a time, experience has shown that what makes the difference is having strength in all eight areas.

About this guide

This guide is rooted in the experience of museums and heritage organisations: all its content comes directly from ideas shared through the AIM Hallmarks programme and the experience of participants.

Overview

We recommend using this guide with a group of trustees, volunteers or staff. The whole guide can be used to structure the discussion for an Away Day or it can be used in sections over a series of meetings.

Some museums and heritage organisations may want to use the Hallmarks for self-assessment and the guide includes questions that can be used to test how well your organisation measures up.

These questions could be scored or rated red/amber/green if you find that helpful. It also includes more open questions, to be used to start conversations and prompt further discussion.

For more advice on planning a discussion around the Hallmarks, see the Guide to Successful Away Days, available on the AIM website, www.aim-museums.co.uk.



You can see that the AIM Hallmarks were developed by museum practitioners. They are practical and easy to apply to your individual museum business, giving you a good sense check of where you are performing well and where you need to focus improvement."

– Helen Bonser-Wilton, Chief Executive,
Mary Rose Trust and Hallmarks
Leaders programme participant



In practice: using the AIM Hallmarks for review

Funded by an AIM Hallmarks Award, the National Waterways Museum used the Hallmarks as the basis for a new organisational plan. After a long period when the organisation had been without a clear direction, the Hallmarks provided the impetus to develop a new shared purpose, which they could use to provide a clear line of sight to future development.

The Roald Dahl Museum used the Hallmarks framework as the basis for a new approach to considering and monitoring risk. Risk management sounds dry, and the consideration of risk at board meetings can easily become a cursory, tick-box exercise. Using the Hallmarks as a prompt meant that the trustees and staff were able to make the risk register a living document which focused on the big picture, not trivial incidents, so that it became a useful tool for helping the organisation face the future.

To read more about any of the case studies mentioned in this guide, visit the AIM website, www.aim-museums.co.uk/hallmarks.

What are the AIM Hallmarks?

The UK boasts some of the best museum and heritage experiences in the world, sharing a rich range of stories, collections and historic sites with as many people as possible, in interesting and exciting ways. Many of these organisations are independent thinking, ready to try new things, resourceful and passionate.

They benefit from the insight of people from a wide range of backgrounds and with varied skills and experiences. The AIM Hallmarks share the experiences of two generations of leaders of these independent and imaginative museums and heritage organisations.



Purpose

You have a clear, compelling and people-oriented purpose that is shared by everyone in your organisation. You actively use it to keep your organisation on course as it flexes and adapts to changes.

Finance

The organisation nurtures a diversity of income sources. Some of these are predictable and it has sound business planning skills. All leaders understand the key drivers of their business model. The organisation actively identifies, develops and utilises its assets to generate income in order to fulfil its purpose.

Leadership & Culture

The leadership of your organisation is clear, directed, delegates freely and fosters a positive culture that is open to new ideas and ready to seize opportunities. Your organisation is independent-thinking and entrepreneurial. It is focused collectively on outcomes. Key information on performance is shared within the organisation.

Collections

The organisation understands the potential of its collection. It recognises what constitutes its heritage assets – including stories, knowledge and places, as well as objects. It seeks to fulfil its purpose through enabling the broadest possible audience to engage fully with all its heritage assets and caring for them in line with best practice.

Governance

All trustees are proactive advocates for the organisation and its purpose. They focus on strategic and significant issues. They avoid conflicts of interest and always wear only one hat at a time. The trustees and senior staff or volunteers understand their different roles and work well together towards the purpose.

Visitor Focus

The organisation actively seeks to understand its current and potential visitors, customers and supporters, and responds to the needs it identifies, when delivering the organisation's purpose. It continually measures its quality and its success in delivering a first-class visitor experience to the broadest possible audience, and seeks to adapt whenever necessary.

Innovation

The organisation encourages innovation and creative thinking. It adapts, invests and takes planned risks, in order to find new and better ways to achieve its purpose. No one accepts that the status quo is fixed and unchangeable.

Awareness & Networks

The organisation constantly looks ahead, including outside of itself to the broader heritage and tourism sectors. It is aware of trends and anticipates challenges. It makes itself well-known, relevant to and visible within its immediate community and has a range of other, wider networks.

Purpose

You have a clear, compelling and people-oriented purpose that is shared by everyone in your organisation. You actively use it to keep your organisation on course as it flexes and adapts to changes.

Measuring up against the Hallmarks

- How compelling is our purpose?
- How relevant is it to a wide range of people?
- How effectively is it shared by everyone in our organisation?
- How well do we use it to test decisions and steer our organisation?

Some further questions you could ask...and why they matter

1. What difference could it make to us as an organisation if we developed a clear purpose or reviewed our existing one?

The importance of having a clear and compelling purpose is at the heart of the AIM Hallmarks. The experience of museums and heritage organisations taking part in the AIM Hallmarks programme has shown that a strong purpose can make a tangible difference to ways of working, to decision-making and to visitor experience.

2. How well does our purpose capture the difference our museum makes, in a way that's particular to us?

A good purpose doesn't have to be grandiose but should be specific to your organisation – a speaker at one of AIM's Hallmarks events gave the example of a playgroup that changed its purpose from 'to improve the lives of families and children' to 'to help the children of our village be ready for school' and found that the more modest, specific purpose was more useful as a tool within the organisation because it was easier to measure their activities against it.

3. What evidence do we have that our purpose is lived out in the organisation, in a way that is obvious to our users?

Corinium Museum had an agreed purpose, but it was not evident in the way the organisation worked. Participating in the Hallmarks Leaders programme, the museum's Director, Amanda Hart, led a process to develop a new purpose for the organisation but also made sure that the purpose was obvious to visitors through the quality of the visitor experience and by planning changes to their branding and visual identity to reflect the purpose better.

Image credit:
Gilbert White's House

Tips & tools

- Many museums have found that the process of developing a purpose can be as valuable as the end result, because it offers an opportunity for everyone involved in the organisation to reflect on their work and how it links to the purpose. Revisiting a purpose that is a few years old will be useful, even if you decide not to change it.
- If a purpose is to be shared, what matters is not that people working in a museum or heritage organisation can recite it, but that their work reflects it and they see how they support it.
- Consultation matters. In developing a purpose, include the people whose work has to reflect the purpose. Consider including stakeholders or users. But it is unlikely there will be complete unanimity and producing a strong purpose typically involves conviction, as well as consensus.
- For much more on board review, recruitment and induction, including the AIM Golden Rules for Good Governance, see the section for trustees on the AIM website.

In practice: Purpose

Supported by AIM through the Prospering Boards programme, Gilbert White's House and the Oates Collection has held a visioning day for trustees, staff and volunteers to define a clearer concept of what the museum is, to shape planning, advocacy and marketing.

Read more about how this helped them on the AIM website.

Leadership & Culture

The leadership of your organisation is clear, directed, delegates freely and fosters a positive culture that is open to new ideas and ready to seize opportunities. Your organisation is independent-thinking and entrepreneurial. It is focused collectively on outcomes. Key information on performance is shared within the organisation.

Measuring up against the Hallmarks

- To what extent do the leaders in our organisation foster openness to new ideas and a 'can-do' attitude?
- How effective are we at seizing opportunities and being entrepreneurial?
- How clear is everyone in the organisation about our intended outcomes and our progress towards them?

Image credit:
Seven Stories, The National Centre for Children's Books

Some further questions you could ask...and why they matter

1. What is our organisational culture and how does it help us deliver our plans?

As Peter Drucker said, 'culture eats strategy for breakfast'. However good a strategy, it needs the right kind of organisational culture to deliver it. The attitudes and behaviours of trustees, staff and volunteers has a big impact on how well plans are delivered or crises are managed.

2. Are we a team, or a group of people working together?

In our Hallmarks organisational development programmes, participants identified three essential elements which have to be in place to turn a group into a team: a sense of being 'in this together', an underpinning of trust and respect and an assumption that collaborating is better than retreating to a silo. Strong teams include people with different backgrounds and perspectives and make the most of a wide range of talents.

3. What do leaders at every level in our organisation do that affects our organisational culture?

Strong organisations enable people to show leadership qualities at every level in its structure, in pursuit of its purpose. Leaders have significant influence on the organisation's culture through what they do as well as what they say and need to work consistently and together to foster the culture that they want.

4. Do we benefit from a diverse team by recruiting people from different backgrounds, with different kinds of skills and experience?

One colleague from Museum Development who had taken part in the Hallmarks programme noted that thinking carefully about their strengths as a team has helped them and colleagues 'avoid hiring ourselves again. Bringing in different perspectives can help avoid 'groupthink' - a term to describe what happens in an organisation when members of a team start to think in such similar ways they lose the power to be creative, or challenge the status quo.

Tips & tools

- Participants on the Hallmarks development programmes used a range of approaches to think about their organisations in new ways. For more on some of the key tools shared on the programme, including the idea of groupthink, see the AIM website.
- Working differently requires more than a top level aspiration to change; it has to filter down to the dozens of small, day-to-day interactions that make up an organisation's culture. One participant on the leaders' programme noted of their previous approach, 'we all agreed that we wanted to work in different ways to achieve our goals - but our behaviours and decision-making stayed the same'.
- Succession planning doesn't always mean looking outside the organisation. At the Mary Rose Trust, Hallmarks funding has supported a programme of internal development and succession planning to help the organisation plan for how people might develop, anticipating future vacancies.

In practice: Leadership & Culture

Seven Stories, The National Centre for Children's Books, was supported by a Hallmarks Award to run a programme of training and development for senior staff. Kate Edwards, CEO of Seven Stories, says that the programme was a response to the recognition that 'leadership and culture are the keystone that everything hangs around so they have to be right'.

Read more about the difference that the programme made at Seven Stories on the AIM website.

Governance

All trustees are proactive advocates for the organisation and its purpose. They focus on strategic and significant issues. They avoid conflicts of interest and always wear only one hat at a time. The trustees and senior staff or volunteers understand their different roles and work well together towards the purpose.

Measuring up against the Hallmarks

- How effectively do trustees advocate for the organisation?
- To what extent do trustees focus on strategic issues?
- To what extent is there clarity about the different roles of trustees and staff or volunteers?
- How well do trustees and staff/volunteers work together?

Some further questions you could ask...and why they matter

1. How well does our board work as a team? How might we get better insight into this?

Many boards carry out skills audits of their trustees. These are useful but looking at individual trustees' skills in isolation is only part of the picture. Think about what attitudes and perspectives trustees bring to the table, looking at their networks and experiences. Make sure your board represents the communities you hope to serve and think about board diversity – including gender and age, as well as cultural diversity. Make sure trustees have chance to get to know one another and value their colleagues' expertise.

2. Do we need new trustees, or need to work differently with current trustees?

Two of the boards taking part in the AIM Prospering Boards programme initially thought they were likely to need to recruit several new trustees. But once the board started to have more engaging meetings and better conversations, they discovered that existing trustees had much more to contribute, which they could unlock by working better together.

In one Prospering Boards project, AIM supported a museum to set up a new operations committee, separate to the board. Some trustees recognised that their strengths lay in operations and were pleased to have the chance to move to the new body, giving new trustees space to think more effectively about the future.

3. Do trustees offer staff the right balance of support and challenge?

From AIM's work with boards and leaders, we know that it is important to develop a significant level of trust and respect between trustees and staff in order to get this balance right. Effective challenge makes an organisation stronger, but has to be balanced by support. Where an organisation has only one member of paid staff, there is often a particular need for support from trustees. One useful approach can be for one member of the board – perhaps informally – to make supporting the manager their focus.

Tips & tools

- Invest in board development, allowing time and resources for Away Days or training and review the board regularly.
- Guard against a tendency to assume that the best candidates are the ones who are most similar to existing board members.
- Ensure that, between them, trustees have relevant contemporary networks.
- Select trustees who are motivated by delivering public benefit and by the purpose of your organisation, but make sure that trustees are sufficiently committed to the nuts and bolts of good governance.
- For much more on board review, recruitment and induction, including the AIM Golden for Good Governance, see the section for trustees on the AIM website.

In practice: Governance

Calderdale Industrial Museum Association was formed to rescue a former local authority museum which had been closed for fifteen years. Having successfully raised funding, the trustees were able to lead the organisation to the point of reopening.

Through the Prospering Boards programme, AIM has been helping them to identify how the board needs to respond to the challenges of this new phase.

Read more about how trustees can move from rescuing an organisation towards running it effectively on the AIM website.

Innovation

The organisation encourages innovation and creative thinking. It adapts, invests and takes planned risks, in order to find new and better ways to achieve its purpose. No-one accepts that the status quo is fixed and unchangeable.

Measuring up against the Hallmarks

- How good are we at encouraging our team to try new things?
- To what extent do we actively look for new ways of achieving our purpose?
- How effectively do we avoid being held back by the objection 'we've always done it that way'?



Image credit:
The Royal West of England Academy

Some further questions you could ask...and why they matter

1. If we compare our ways of working now to three years ago, what has changed?

All organisations need to adapt and develop, but sometimes people are put off by the idea of 'innovation'. Recognise that you probably already have a successful track record in innovation and are doing things that you weren't doing a few years ago.

2. How do we make sure people who work in the organisation feel safe enough to try something new?

Not everything you try will work. Make sure people know they won't be blamed if things don't go as planned. Encourage a culture of learning and trying again and make sure people feel supported. Some of AIM's Hallmarks programme participants worked in Action Learning Sets and one noted: 'the programme pushed me to take more risks because I had such a strong backing, a group standing behind me if things don't work.' Leaders in organisations need to find ways of ensuring that colleagues feel they have that safety net, and need to find support for themselves.

3. Have we properly explored the possibilities that digital approaches offer?

As technology becomes increasingly affordable, there is more than ever to be gained from being curious about and willing to try using digital or technology based ways of doing things, whether it's collecting onsite donations, managing event bookings or giving access to collections.

4. What more could we do to help people who work here to be innovative?

Speaking at a Hallmarks event, Traci Dix-Williams (then of Ironbridge Gorge Museum Trust and now Chief Executive of the Dudley Canal and Tunnel Trust) reflected on IGMT's investment in staff development, which includes annual events when the museum closes to allow all staff to contribute to developing new ideas and shaping future plans. The days are planned according to the principle that 'if you want creative people, you have to let them play'. What might it mean in your organisation to allow people to 'play' and what benefits might it bring?

Tips & tools



- Innovation is about adapting and improving what you do already as well as about completely new activities or services. Think about how you can encourage innovation in both areas.
- Getting people from different departments or volunteer teams to think about a challenge together can be a way to spark new ideas by bringing together their different expertise and perspectives.
- Use low cost ways to try new ideas out and reflect on them straight away to see if they are working so you don't spend a lot of time on something that won't work but can learn from it. This idea is sometimes called 'fail fast' and there are lots of resources exploring it online.



In practice: Innovation

The Royal West of England Academy was funded by an AIM Hallmarks Award to develop a new corporate training offer, giving clients the opportunity to spend a day working with artists, as an alternative to the existing 'team building' activities market.

The new activities aim to create a new income source for the museum, but have also offered the opportunity to work in new ways, with new partners, and to see the value of what the museum has to offer through a different lens.

Read more about the process of developing and testing out a new way of working on the AIM website.

Awareness & Networks

The organisation constantly looks ahead, including outside of itself to the broader heritage and tourism sectors. It is aware of trends and anticipates challenges. It makes itself well-known, relevant to and visible within its immediate community and has a range of other, wider networks.

Measuring up against the Hallmarks

- How effectively do we identify external developments that might affect us?
- How well do we know our community?
- How well known are we by our community?
- How good are we at making connections with wider networks? Visitor experience?



Some further questions you could ask...and why they matter

1. What would a good network look like for our organisation?

In considering what organisations you could work with, keep an open mind. An important principle of the Hallmarks development programmes was that they drew on good practice from outside the heritage and cultural sectors, encouraging participants to look for inspiration from the broader community and voluntary sectors. Many participants found inspiring parallels to their own work, and new ideas and approaches.

2. Which organisations do we know of that might be facing the same challenges as us?

Colin Vallance, Director of Wheal Martyn Museum and a participant on the AIM Hallmarks Leaders programme reflects on the value of networks: 'It's good to understand the challenges of people in similar position. Sometimes in isolation you feel that other people don't have the same challenges – and it's good to see you are not alone. A strong network means there are people you can go to for advice straightaway rather than search around.'

3. How do we get our ideas and inspiration?

Kate Edwards, Chief Executive of Seven Stories notes: 'There's a lot of stuff out there; we should be like magpies – there are things from all sectors – the wider third sector and the business sector. So it's about keeping your eyes open for ideas and resources that are relevant and challenge you, make you think critically or affirm what you're doing'.

In particular, visiting other museums, heritage organisations and visitor attractions as a team (whether a group of staff, volunteers or trustees) can be an effective and low-cost way of seeing your own organisation with new eyes.

Tips & tools

- Networks are a long-term investment. Remember that if you need support in a crisis, it is too late to build the relationships that could help.
- Leaders of successful organisations look beyond their immediate sector for developments which might affect them. A PESTLE analysis can be a useful tool (with guidance widely available online)
- Strong networks, and knowing how to use them, are vital to fundraising, as is the ability to understand how what you are offering compares with other things people might be thinking of supporting (which may not be in the cultural sector at all).

In practice: Awareness & Networks

Port Sunlight Village Trust was supported by an AIM Hallmarks Award to work with local partners to develop a new offer to the group visits market.

Recognising that the village and museum was not quite a big enough draw to attract coach parties on its own, the museum set out to work with other local attractions – including a garden centre, as well as other heritage attractions to collectively increase their pull. The project involved strengthening existing relationships and building others outside the museum's previous sphere of influence.

Read more about the impact of these new relationships on the AIM website.

Visitor Focus

The organisation actively seeks to understand its current and potential visitors, customers and supporters, and responds to the needs it identifies, when delivering the organisation's purpose. It continually measures its quality and its success in delivering a first-class visitor experience to the broadest possible audience, and seeks to adapt whenever necessary.

Measuring up against the Hallmarks

- How well do we understand our current audiences' needs and motivations?
- How well do we understand our potential audiences' needs, interests and motivations?
- To what extent does our planning and investment flow from putting our current and potential audiences' needs first?
- How effective are we in delivering a first-class visitor experience?



Image credit:
Firing Line Museum of the Welsh Soldier

Some further questions you could ask...and why they matter

1. How good are we at finding out what our visitors want and whether the experience we offer them matches up?

Because staff and volunteers know the museum well, it is sometimes hard for them to appreciate how a visitor experiences it. Low cost ways of finding out what visitors think of their experience include asking front of house staff and volunteers, or chatting with visitors. If you are planning to make big decisions about developing the museum, it is important to do more thorough research. The findings of research should be shared throughout the museum so everyone can use it to improve what they do.

2. What do we need to do differently to encourage groups of people who don't visit at the moment to want to come?

Museums that wish to attract new audiences need try to understand what the museum might seem like from the perspective of people who don't visit. They need to start by finding out what is interesting to the people they want to come and what the barriers are that stop them coming and then think about how the museum can change to meet their needs.

The Lightbox in Woking knew that people in their twenties and early thirties (so-called Millennials) didn't visit in significant numbers, but didn't know why. Supported by AIM Hallmarks award, the museum was able to undertake research to find some of the answers (younger people weren't in Woking when The Lightbox was open, they thought anything local would be of poor quality) and develop late night openings to target this audience and build new relationships.

3. In what ways do we put the visitor and potential visitor first, in our museum?

Successful museums think about the needs of and impact on their visitors in relation to every decision, from setting strategy at trustee meetings and deciding on major investments, to operational decisions about things like customer service, signage or events. The Historic Dockyard Chatham has worked to listen more closely to its visitors, actively using the answers to help plan for the future rather than assume what visitors may want. To attract new family visitors, it tests activities with a family panel, adapting them if feedback suggests this is necessary.

Tips & tools

- Gather information about your visitors and the experience they have from across the organisation, including asking volunteers.
- Understand what visitors most value from their visits and emphasise these things in marketing. Think about helping people feel comfortable at the museum, as well as what there is for them to see and do.
- In 2017, AIM initiated a project designed to help museums increase the diversity of their visitors. Working with a mix of museums across the UK, the project identified practical actions that leaders can take to improve visitor diversity in their organisation. A link to the resources produced - Open Up: Museums for Everyone - is available from the AIM website.
- Visitor Verdict offers low-cost visitor research and the opportunity to benchmark against similar attractions. There are discounts for AIM members. (See www.aimvisitorverdict.com)

In practice: Visitor Focus

Supported by a Hallmarks Award, Firing Line Museum of the Welsh Soldier undertook research to enable them to understand their visitors and non-visitors better, and to explore ways of building new audiences, to enable them to be more sustainable.

Read more about the changes the research enabled them to make on the AIM website.

Collections

The organisation understands the potential of its collection. It recognises what constitutes its heritage assets – including stories, knowledge and places, as well as objects. It seeks to fulfil its purpose through enabling the broadest possible audience to engage fully with all its heritage assets and caring for them in line with best practice.

Measuring up against the Hallmarks

- How strong is the link between our collections and our purpose?
- How well do we realise the full potential of our collection to benefit a broad range of people including those we have not engaged with in the past?
- How clear is our picture of what constitutes our heritage assets, including looking beyond objects and specimens?
- To what extent does our collections care meet best practice standards?

Image credit:
John Ruskin's house

Some further questions you could ask...and why they matter

1. How well do we open up the potential of our collections? Could we review our collection development policy or tell different stories to make the museum more relevant to a wider range of people?

The same collections can be used to tell new stories: one museum participating in the Hallmarks programme noted that, for them, the challenge was 'to move from communicating about the object to communicating how that object links to ideas that impact the world.' Sometimes maintaining strong connections to a community will mean collecting different kinds of objects and stories. Think about the scope to include external voices in interpreting collections and gathering collections knowledge.

2. What does it mean to us as an organisation to think about our collections, stories and places as assets?

The Hallmarks framework encourages museums to look at collections as heritage assets to underline the idea that collections are an opportunity and a starting point – something to make the most of, not a burden to be managed.

3. Does our purpose shape how we use our collection? Does our collection inform our purpose?

Sometimes a renewed vision for a whole organisation can be driven by a new perspective on a collection. At the Charles Dickens House Museum, the organisation has built a new sense of purpose around the spirit of Dickens himself, aiming to be activist and outward looking. Director Cindy Sughrue notes that in looking closely at the collection, museum staff realised it was effectively 'telling them what to do'.

4. How can we improve collections management and collections care in a way that increases engagement with our collections and fulfil our purpose?

Well-managed collections are an essential requirement for any museum, but not an end in themselves. Consider how improvements to collections management might help deliver the organisation's purpose, whether through improvements to storage and documentation or review and rationalisation. Ensure there are sufficient budgetary resources to support collections management in pursuit of your purpose.

Tips & tools

Some further questions you might ask about how you use your collections:

- How might we look at our collection from new perspectives?
- What do we know about people who don't visit our museum at the moment to help us understand what they might find relevant or inspiring in our collections?
- What connections can we draw out from and around our collections?
- What are the ideas or themes that hold it all together?
- Are we being sufficiently challenging and provocative in how we use your collection? Do we offer the unexpected, or do we always play it safe? What is there in our collection that scares us?
- What new approaches can we find to telling stories about our collection?



In practice: Collections

Brantwood, John Ruskin's house in Coniston, received an AIM Hallmarks Award to help the museum tell new stories about their collection. The project offers new perspectives on Ruskin as a radical thinker, through a series of videos which use objects in the collection as a starting point for an exploration of ideas.

Read more about the way that this new approach to the collection has helped strengthen the organisation on the AIM website.



Finance

The organisation nurtures a diversity of income sources. Some of these are predictable and it has sound business planning skills. All leaders understand the key drivers of their business model.

The organisation actively identifies, develops and utilises its assets to generate income in order to fulfil its purpose.

Measuring up against the Hallmarks

- How well-balanced is our mix of income?
- How well do all leaders understand our business model?
- How effectively do we make the most of our assets to generate income?

Some further questions you could ask...and why they matter

1. To what extent does the whole team understand the museum as a business?

Ensure everyone understands the museum's business model and how it is performing financially. The whole team should feel responsibility for generating income as well as for how money is spent. One participant in the Hallmarks programme noted that few volunteers even thought about their museum as a business, which meant they missed opportunities to encourage café purchases, for example. Sharing better information about the importance of catering income encouraged them to change their approach.

2. What changes might there be in our operating environment which could have an impact on our financial position?

Museums need to be on the lookout for risks and opportunities outside the organisation as well as inside it. New TV programming or anniversaries can hugely increase interest in a place or subject. Recent structural changes such as auto-enrolment pensions or the introduction of Museums and Galleries Tax Relief have had significant impacts on museum finances. Make sure similar developments do not catch your organisation by surprise.

3. What can we learn from other heritage organisations, and from other organisations in our community?

Do we think about how we compare to others, and compare our own performance from one year to the next? Benchmarking in this way can help get pricing right and identify areas where there is most potential to improve.

4. Are there ways in which we can both fulfil our purpose and generate income?

The organisation's purpose should help determine which types of income generation to focus on, whether this is stocking the shop with items relating to the museum's subject matter, or taking opportunities to combine income generation and visitor experience: for example, the Black Country Living Museum, offers the opportunity to buy fish and chips in a historic shop.

Image credit:
Ditchling Museum of Art and Craft

Tips & tools

- Ensure that trustees consider finances at every meeting, and that all trustees know that finance is not just the Treasurer's job.
- Make sure you know which income generation activities are really profitable – it's a common mistake to pay too much attention to turnover, without taking full account of the costs involved to the organisation, including staff costs.
- Use AIM's Guide to Successfully Setting Admissions Pricing and Policy to consider whether your admission policy and pricing is working as well as it could.
- AIM has a range of other Success Guides to aspects of income generation, including catering, retail and venue hire.
- From mid 2018, AIM members will be able to access free resources from the Charity Finance Group to help them understand and manage their businesses more effectively. For more information, see the AIM website.

In practice: Finance

Having completed a major capital project in 2013, Ditchling Museum of Art + Craft is looking ahead to its next steps.

AIM has supported the museum through the Hallmarks programme to carry out research into potential different business models for the museum, reviewing their current operational model and suggesting changes and improvements for the future.

Read more about the findings of the research on the AIM website.

Resources

Highlights of AIM's other resources and a few key publications, particularly those which offer practical support for making change in your organisation.

Key resources

AIM website

The AIM website has a section for each of the AIM Hallmarks with further case studies, ideas and articles, to add to those outlined in this guide. To find out more, visit www.aim-museums.co.uk/aim-hallmarks

Building Resilience

Building Resilience offers a series of three courses, supported by Arts Council England, which cover defining your purpose, reviewing your business model and developing your organisational culture. The series of courses can be accessed from www.a-m-a.co.uk

Some of the ideas from the Building Resilience Programme about developing purpose are also included in a free course called 'The Secret Power of Brands'. This course can be accessed from www.futurelearn.com

Making Adaptive Resilience Real

When they were developed in 2015, the Hallmarks drew on the work of Mark Robinson, particularly his report for Arts Council England, Making Adaptive Resilience Real. Additionally, Mark's 2011 report The Role of Diversity in Building Adaptive Resilience (co-written with Tony Nwachukwu) remains a strong argument for how diversity contributes to resilience. To download either, visit www.thinkingpractice.co.uk (downloads page)

Increasing your organisation's diversity

Art's Council England's Culture Change toolkit: developing diverse talent, workforce and leadership explores how your organisation can develop a diverse workforce and leadership. To download, visit www.artscouncil.org.uk (advice and guidance page).

Working with Consultants

If you are new to working with consultants, a guide called 'Working with Consultants' from Power to Change offers helpful pointers. Download from www.powertochange.org.uk

Open Up: Museums for Everyone

This is a guide to increasing and diversifying audiences, produced with museums involved in a project initiated by AIM in 2017. As well as ideas about audiences, it also includes exercises to help museums think about developing their organisational culture. Find out how to access the guide at www.aim-museums.co.uk

Environmental sustainability

Greater environmental sustainability can contribute to your organisation's resilience, in many ways. For case studies and a framework to assess your museum's performance in this area, download the free 'Museums Framework' from www.juliesbicycle.com

For trustees

Practical support for trustees is available on the AIM website at www.aim-museums.co.uk/resources/for-trustees/

Resources include:

- Successful Governance in Independent Museums
- Successful Away Days for your Board
- An introduction to the museum sector for new trustees
- A guide to better trustee meetings
- A guide to reviewing your governance
- A guide to running a trustee recruitment process
- AIM Golden Rules for Good Governance

We also recommend these longer reads from the Association of Chairs:

- A Question of Balance: A Guide to the Chair and Chief Executive Relationship
- A Chair's Compass: A guide for chairs of charities and non-profit organisations

Download either from the Resources page at: www.associationofchairs.org.uk



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