



Association of Independent Museums

The National Body Connecting, Supporting
and Representing Independent Museums

AIM Research Study: Examples of Successful Practice

November 2012

Black Radley

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Table of Contents

1	Introduction	3
2	Examples of Successful Practice	4
2.1	Co-location	4
2.2	Commercial approach	7
2.3	Developing a more enterprising approach	10
2.4	Licensing and Product Development	14
2.5	Links with educational/academic organisations.....	16
2.6	Micro businesses	19
2.7	Museum start up	22
2.8	Partnerships and Consortia	25
2.9	Partnerships with Local Authorities	28
2.10	Social Enterprise	31
2.11	Social Media.....	34
2.12	Taking on Services from Local Authorities	37
2.13	Volunteering	40

1 Introduction

During the autumn of 2012 Black Radley Culture (BRC) was commissioned to identify, summarise and briefly review successful business ideas or strategies as exemplars for museums, galleries and related organisations for Organisational Resilience. BRC worked closely with AIM and other representatives of the sector, as well as utilising its own extensive experience in the areas of enterprise and resilience to identify topics which were of most relevance to independent museums. We then carefully sought out pertinent case studies which illustrated these key resilience topics, from across the sector and beyond, based on recommendations of others and our own knowledge.

We have been able to draw together thirteen case studies which highlight the successful practice going on across the museum, heritage and voluntary sectors. The studies demonstrate that innovation is thriving across the sector, and museums are using a range of strategies to move to resilient positions. The purpose of the work was not to identify the “best” or “most successful” example (although we have a number of very high quality examples) in a particular area, more to illustrate practice that had delivered effectively, had applicability elsewhere in the sector and identified a range of useful learning points for museums and those working in them. We believe the examples we summarise in the document cover such areas well and provide the sector with much food for thought.

2 Examples of Successful Practice

2.1 Co-location

Organisation: Bradford on Avon Museum - Bradford on Avon, Wiltshire
<http://www.bradfordonavonmuseum.co.uk/>

Contact: Mervyn Harris, Chairman

Background (What were the reasons for change?): The Museum originated in 1986, when a local pharmacy shop owner planned to retire in Bradford on Avon. Many people in the town wanted to preserve the pharmacy shop, and there was a drive to set up a museum to commemorate it.

A brief summary of the activities/work involved: A number of options were considered, but when it became apparent that Wiltshire County Council wanted to build a new library in the town, the volunteers associated with the pharmacy shop approached the Council at an early stage, and asked if a museum could be included in the new build.

The Council asked for a contribution of £30,000, The Volunteers formed themselves into a museum society and launched a fundraising campaign. They had to source the money very quickly from a variety of sources, including a contribution of £10k from the Town Council.

The Museum Society entered into meaningful discussions with WCC about the scale and nature of the space that might be allocated to the museum. Whilst a space was found for the museum by the Council, the Society was disappointed with it, being situated on the first floor of the building and somewhat tucked away.

The new building was opened in 1990, with the museum an integral part of it. During that early period the premises suited the museum. However, the museum has continued to develop and grow, it has broadened and strengthened its collection, and now, more than twenty years after the building originally opened, the existing co-location arrangements no longer suits its needs.

The Museum Society is actively looking for a new base, as the original 25 year lease, agreed with WCC, ends in 2015. The Society, along with the Tourist Information Centre and Preservation Trust, is currently investigating the possibility of being part of a campus site operation in the town, which will involve discussions with other local community organisations and Wiltshire Council

What resources were involved (Staff/cash/time)? Initial cash requirement of £30,000 by the County Council.

Who did you work with (Partners/Stakeholders/Friends)? Wiltshire County Council/Wiltshire District Council

What were the timescales?

What were the benefits/achievements/successes for the organisation? Being located in the Council-run library building, the museum has benefited from a peppercorn rent since 1990. Other utility costs, such as heating and lighting, have also been absorbed by the Council.

Moving in with the Library also gave the public and other stakeholders more confidence in the future sustainability of the Museum Society.

There have been other specific benefits from being located in the library, such as increased visitors from library events and general library footfall.

What were the lessons learned, challenges and barriers? Sometimes you do not get all you wish for when sharing a building. The Museum Society would have liked a larger more accessible space, but had to compromise at the time.

Co-locations may well be time limited; the needs of one or other of the partners may change; one may grow and expand, and the partnership may need to change radically, or come to an end.

The Museum Society in Bradford on Avon took the opportunity offered by the County Council in the late 1980s. Other opportunities were explored, but each had its drawbacks and the option of co-location in the library building was chosen as being the best one available at the time.

Applicability of the project to the Independent Museums Sector – The building share between the Bradford on Avon Museum and the local library has similarities

with a range of other co-locations independent museums are currently involved with. Such partnerships present opportunities, like increased footfall and low rent in Bradford's case, but they will also present challenges, such as limited space and access. Those involved with Bradford Museum have coped admirably with these types of challenges and they have adapted their expectations to suit their shared home. They have maintained strong links with the local community and keeping focused on their long term ambition to grow and develop the museum. The museum is an important asset in the cultural life of Bradford on Avon and in assisting tourist development in an historic town with a rich cultural heritage. This ambition is likely to result in another form or partnership and/or co-location, yet the volunteers at Bradford on Avon will go into such a venture with their eyes wide open understanding both the strengths and weaknesses of this type of development. Their approach has many transferable learning points.

2.2 Commercial approach

Organisation: Galleries of Justice Museum - Nottingham,
<http://www.galleriesofjustice.org.uk/>

Contact: Nicola Burley

Background (What were the reasons for change?): The Galleries of Justice Museum was founded in 1993 by the Museum of Law Trust and opened as a Museum in 1995. Housed in the Grade 2 listed Shire Hall there has been a court on site since at least 1375 and a prison since at least 1449.

In 2000 there was a redevelopment of the education department to focus primarily on Citizenship and Crime prevention using the Museum's courts. Since that time the Museum has acquired many awards including the inaugural Gulbenkian Award in 2003 and been successful in achieved major funding for its programmes.

Under the leadership of Tim Desmond the charity was redeveloped in 2007 to become the Egalitarian Trust comprising of the Galleries of Justice Museum, The National Centre for Citizenship and the Law (NCCL) and the City of Caves. As well as in Nottingham the educational team (NCCL) now also operate from the Royal Courts of Justice and UK Supreme Court in London and the Sessions House in Northampton.

As independent museum running costs had always presented a challenge. Therefore in 2008, the Chief Executive, took the step of appointing a senior officer with direct responsibility for profitability of the organisation, the brief being to increase turnover and reduce costs whilst maintaining the excellent reputation and social purpose of the trust.

Nicola Burley was appointed, her previous role has been as a corporate bank manager, and she had a strong commercial background, with a wide range of contacts and networks in the business sector. She set about, working closely with Chief Executive, developing an effective and sustainable commercial approach across the Trust, building on good work already taking place in the organisation, but commercialising the model to get the best out of it. They further recognised the impact the recession would have on the sector and realised they needed to get a step ahead of other funded and non-funded organisations if they were to become resilient.

A brief summary of the activities/work involved: A three year forward plan was put into place with the aim to become sustainable by the end of the plan.

The services provided by the Galleries of Justice Museum and its associated costs at the time were analysed, and a focus on diversifying income streams was introduced. The organisation went through a process of using a forensic accountant to analyse the business and draw up priorities, which in turn led to rationalising the senior management team then restructuring the board.

Activities included renting out further parts of the extensive buildings at the Galleries of Justice, renovation of its sister attraction, the City of Caves, improving its conference and events delivery by improving its offer from room hire and ghost tours to include weddings and medieval banquets, Nicola and Tim work hard to increase the profile of the organisation by attending and speaking at local business clubs as well as national conferences, Nicola also holds her own regular networking events, not only raising the profile in the local area of the charity but also raising sponsorship and donations. In addition they have drawn on the organisation's strengths to create Education Syndicates and Commercial Syndicates to deliver services on behalf of other organisations. A review of tax status and the assets of the business was also conducted resulting in improved income and Balance Sheet values.

What resources were involved (Staff/cash/time)? The museum has a team of approximately 30 people plus a team in London and Northampton. This team was restructured to centralise front of house and administration roles and new staff were appointed from the commercial sector.

The sales team has also been reorganised with further appointments from the broader business sector. This team service the Museum, the City of Caves, NCCL in Nottingham, London and Northampton. The Museum also recruits a pool of volunteers to help out in the busy seasonal periods. Furthermore the attractions continue to remain open 7 days a week

Who did you work with (Partners/Stakeholders/Friends)? Nicola, and the team, have worked closely with a range of key partners. These include Trustees, Experience Nottingham (the local Destination Management organisation), Tourist Information Centre, other heritage and arts sites, as well as local hotels and restaurants, and the business sector including national Accountancy firms, Solicitors, Banks, Coach companies .

What were the timescales? A three year plan was introduced in 2009 and the next 3 year plan has been agreed.

What were the benefits/achievements/successes for the organisation? In 2011/12, the organisation actually achieved a small profit with little project funding and a small bonus was paid to the staff for the first time.

Visitor numbers at the museum have increased by 15% since 2007/2008 and ticket income (including gift aid) for the museum is predicted this financial year to increase by 71% compared to 2007/2008 and across the two visitor attractions by 51% compared to the same time.

The three year plan has worked well, the next three year plan will look at developing further income streams so that profits can be fed back into the organisation to review and improve the visitor product at the organisation and invest in its staff. There will also be a continued focus on improving the profile of the organisation and its charitable work at a regional and national level.

The Galleries of Justice Museum and NCCL are now seen as a centre of excellence in a range of areas, these include Education Syndicates and business development, and are often approached by other cultural organisations for advice and guidance.

What were the lessons learned, challenges and barriers? When organisations appoint to roles which require specific expertise, they need to ensure the successful applicants have that particular expertise, and that their attributes match the job description. Museum professionals are excellent in many areas but it should not be assumed that they are experts in commerce, fundraising or project management.

The value of bringing in others from the commercial sector cannot be underestimated, it can result in a balanced workforce of private, voluntary and public sector employees.

Organisations need to have the courage to take calculated risks and challenge the norm, this allows innovation, and develops a more enterprising and sustainable approach. Organisations need to ensure that they meet their charitable objectives and maintain their heritage sites whilst giving equal weighting to the commercial management of the business.

Applicability of the project to the Independent Museums Sector – The Galleries of Justice Museum is a sizeable organisation and therefore has the capacity to bring an experienced individual into a senior post. Many other organisations in the independent museums sector may not be able to do the same. However a number of the basic principles applied by the Galleries are transferable; the development of a robust forward plan, a stronger focus on enterprise and income diversification and regular access to good quality business advice are all within the grasp of the majority

of medium sized organisations in the sector. The approach of bringing in specific expertise to deal with a particular challenge is also one to be acknowledged, all too often museum professionals are expected to be the jack of all trades, and this has risks associated.

2.3 Developing a more enterprising approach

Organisation: Sir John Moore Foundation -Appleby Magna, Leicestershire
<http://www.sirjohnmoore.org.uk/>

Contact: Deana Wildgoose

Background (What were the reasons for change?): The Sir John Moore Foundation and its Grade I listed building built in 1697, provide support and a home for the local primary school. The foundation has four areas in which it works - Heritage (& conservation), Learning (for all), Community (& social wellbeing) and Enterprise (& innovation).

The Foundation had been on the edge of crisis for a number of years leading up to 2002, the organisation was running at break-even – and was not able to fund ongoing repairs to the building. The Educational Charity faced severe difficulties, they were responsible for the site and all its buildings – and there was also the prospect of the resident primary school moving out.

The relationship with the primary school which is located on the Foundation's premises had often been challenging, it was difficult to get the school to accept its responsibilities for maintaining the building.

The Trustees in 2002, with School Governors and local residents, spearheaded a campaign with the help of the local and County Councils and English Heritage to raise the funds to rescue the historic school building and site. This eventually led to a £2m project – the largest restoration project for Heritage Lottery in the East Midlands at that time.

A brief summary of the activities/work involved: Part of the rescue involved creating a sustainable income stream from 4 offices and 2 apartments. A Heritage Centre was also created along with community spaces and new facilities for the primary school.

Following the rescue the Foundation started opening up the building for the community and joined the rural touring scheme (bringing professional theatre and music to rural venues). Staff at the Foundation quickly realised that the range of facilities needed to be improved. Therefore, with their own funds, the Foundation

converted half of the redundant cellars in the building into a licenced bar, this then allowed the Foundation to firstly broaden their events programme and then target the weddings and parties market, which they did successfully now regularly hosting more than 20 weddings a year providing a significant income stream as well as local jobs.

The Foundation also set up a youth club, which increased access to the Foundation but also acted as a way of the Foundation identifying the needs and expectations of young people in the locality. This led to staff at the organisation securing money to firstly build a recording studio in another part of the cellar, and then a radio booth, both of which are used regularly by young people.

A range of other activities and events are now hosted and organised by the Foundation, these include comedy and music nights, an annual festival, a film club for children, as well as IT courses for the elderly.

More recently, building on the expertise of one member of staff, the Foundation has also developed an alternative curriculum, providing targeted learning opportunities for young people who struggle with main-stream school for a variety of reasons. The curriculum has been a great success with local schools many of whom are buying in the service. This programme currently generates sufficient income to cover all of its costs and is due to make a surplus this coming year. In addition it enables the Foundation to bid for grants from a range of organisations and funders.

The relationship with the resident primary school has been much improved with both parties working together to ensure the building is properly maintained and the shared use of the building runs as smoothly as possible. Issues still remain over the costs of planning for long term works and for the school to ensure the needs of the building are met when there are IT and other educational resource requirements to make demands on the limited funds available.

What resources were involved (Staff/cash/time)? The move to this more enterprising approach has involved a large amount of vision, time and effort, however staff saw this as their key priority.

There was also significant financial investment in the initial rescue which allowed for a solid sustainable income stream to be generated from the offices and apartments which created a sustainable role for the Manager.

What were the timescales? The initial rescue took place in 2002, and since then there has been a gradual increase in the range of activities and income streams by the Foundation.

The focus for the Foundation now is to become the host for a range of smaller Social Enterprises, giving such community focused activity the freedom and opportunity to operate in a unique environment.

What were the benefits/achievements/successes for the organisation? The process of becoming more entrepreneurial has enabled the Foundation to move from a situation where it wasn't able to afford day to day repairs to a situation now where it is generating significant revenue annually in order to meet its responsibilities, and has a reserve of £100,000 to fall back on.

At a practical level not only has the approach generated a much broader range of revenue, but it has also brought a much wider, range of people into the Foundation, raising its profile and confidence.

In 2010 the Foundation worked with the School to develop a Conservation and Sustainable Development Plan, this enabled funds to be raised from Community Builders to work with professional architects to put together a Master Plan for the site. This is crucial in generating confidence from key funders such as HLF, English Heritage and ACE and has given the foundation a strong platform on which to tackle the future development of the site. It has provided a joint focus for both the school and the Foundation and different parts of the Master Plan can be tackled at different times depending on the needs and wishes of the school and Foundation and the availability of funds at that time.

What were the lessons learned, challenges and barriers? The change in approach takes time to bed in and succeed across an organisation.

Some of the activities and innovations tried by the Foundation have not succeeded, but this should not dissuade individuals and organisations from continuing to be innovative.

Having a robust and long term plan is crucial in developing positive relationships with funders.

A fundamental challenge the Foundation has had to deal the perceptions of disadvantaged young people both from governors and parents at the resident primary school, and local people themselves. Staff have worked very hard to dispel what have mostly been poorly informed misconceptions and, for example, are due to undertake a joint presentation at a forthcoming Parents evening at the School to ensure they are well briefed.

Being adaptable and opportunistic when funds or advice become available

To share plans, successes and failures with others – you never know where help may come from in the future

Having focus, vision and commitment from staff and the Board that is flexible but that doesn't waiver!

Applicability of the project to the Independent Museums Sector – The Foundation undertakes a wide range of educational and heritage based activities however the approach it has adopted has real applicability to the wider independent museums sector. It involved building on the Foundation's assets to build and diversify income streams, such enterprising work was based on a clear understanding of the needs and expectations of local audiences. They were not afraid to invest their own resources try new initiatives and push the boundaries on the sort of services and activities the organisation could offer. Linking high quality education activities to a previously identified gap in the market is also an approach to be applauded. The manner in which the Foundation has dealt with a challenging co-location issue should not be down played either, taking a long term approach, identifying issues of shared interest and responsibility, and ensuring regular communications.

2.4 Licensing and Product Development

Organisation: The British Postal Museum and Archive - Phoenix Place, London
<http://www.postalheritage.org.uk/>

Contact: Dr Adrian Steel

Background (What were the reasons for change?): When the British Postal Museum and Archive (BPMA) separated from the Royal Mail (RM) it was set up as an independent Trust, whilst it received a funding settlement, there was also a strong expectation that other income was secured. BPMA focused on two main areas, charitable fundraising and trading.

BPMA set up a trading subsidiary to channel this work through, and the Royal Mail actively encouraged the BPMA to utilise the assets and products it had passed onto the Trust and a number of options were explored by the Trust. This included researching and developing a range of BPMA product lines, however it quickly became clear that despite the products being of good quality and relevance, the BPMA could not secure the necessary routes to market on its own. This situation was not helped by the fact that the BPMA did not have a significant museum building present at the time.

A brief summary of the activities/work involved: Therefore Trustees and staff decided to focus much of their efforts on exploring the potential licensing opportunities provided by the Intellectual Property owned by the BPMA. It soon became clear to the BPMA that the Licensing world is heavily dependent on contacts and networks, and that appointing an agent would be necessary.

BPMA appointed Licensing Management International (LMI) to act as their agent because they could deal with BPMA and RM IP together, making a more compelling offer, and gave them the responsibility for marketing all of the Trust's intellectual property (IP). LMI targeted the key brand fairs and, despite being fairly small scale in the licensing sector, BPMA have secured a number of licensing contracts which have resulted in related images being used on mugs, books, gifts etc.

BPMA are now in the process of concluding a new IP agreement with the Royal Mail which should ensure there is a clearer divide between the Licensing work of the Trust and that of the Royal Mail, giving the Trust greater opportunity to work

independently. The BPMA are also now considering increasing their focus on the development and sale of higher end product lines where they feel there is an opportunity to generate increased income.

What resources were involved (Staff/cash/time)? The work around Licensing has been very intensive and used a significant amount of staff time at BPMA.

Who did you work with (Partners/Stakeholders/Friends)? The Royal Mail

What were the timescales? BPMA's initial work around licensing started in 2004/2005, it is only recently that larger contracts have been secured.

What were the benefits/achievements/successes for the organisation? At a practical level it has resulted in some agreements with significant minimum guaranteed royalties for BPMA.

The Licensing approach has also been useful at a strategic level with Trustees, the Royal Mail and other stakeholders to demonstrate that BPMA can indeed secure sizeable external income.

What were the lessons learned, challenges and barriers? Working with the Royal Mail around Licensing has been challenging at times, and it has been a time consuming process to secure their approval for individual deals – something we hope to avoid the need for in future.

It is important to realise your position in the market. Working through the agent, it became apparent to BPMA that, even within the Cultural Sector, they were a relatively small player compared to the likes of the National Museums.

It has also become clear that while large numbers of people see products and images related to BPMA through the licensing deals, they often do not appreciate the links to BPMA.

Organisations need to have a realistic expectation of the large amount of time and effort required to make Licensing work.

Applicability of the project to the Independent Museums Sector – The British Postal Museum and Archive is blessed with some highly recognisable and significant intellectual property and assets. Nevertheless many museums, small and large, may well have collections, buildings or other types of assets that are not only unique, but might be of value to a particular audience or customer. The avenue which BPMA took of bringing in an agent (or perhaps another individual with a proven expertise in the area) to understand better the value of the intellectual assets and to assist them

in getting to market, is one to be followed. The world of franchising and licensing seems to be a complicated one, and having the right networks is key. The amount of time required to move this sort of thing forward is also important, and needs to be borne in mind if an organisation is considering dipping their toe in the water.

2.5 Links with educational/academic organisations

Organisation: The Boleh Project - Portsmouth <http://www.bolehproject.com/>

Contact: Chris Austin

Background (What were the reasons for change?): Boleh, a historic junk-yacht of unique design, is being restored in Portsmouth and turned into the perfect vessel for providing inspirational training to disadvantaged young people. Boleh was built in 1949 and its original owner, Commander Robin Kilroy, always hoped the boat to be used for training purposes once in UK waters. The boat was brought to the UK in 2008 by two of Kilroy's nephews, Henry and George Middleton, to be fully restored and with an ambition for it to be used for Sail Training again, but this time for disadvantaged school children in the Portsmouth area.

A brief summary of the activities/work involved: It was clear to Henry and George that significant work was required to fully restore the boat and provide training opportunities, and other partners were required to enable that to happen. The first major partner involved in the restoration was the Meridian Sailing Trust, a training focused organisation, however challenges quickly arose and Meridian went bust shortly after forming the partnership. Therefore the Boleh Trust was formed, Henry and George, along with a small band of volunteers, decided to undertake the project themselves.

Members of the Trust already had strong links with Portsmouth City Council, and they were able to secure a site on the Old Pump House workshops, Eastney, at advantageous rates. The City Council were anxious to attract heritage related activities to the site and the Boleh Trust complemented the other activities already taking place.

The Trust began fundraising, and brought in a number of apprentices from the local training centre. However it soon became apparent that it would not be possible to restore the Boleh fully on that basis, more resources were required. Therefore discussions with the HLF began, it was clear that the HLF were interested in the

project from the outset, however not only did they want to see the boat restored and heritage skills invested in, they also expected active involvement with the local community in order to promote the appreciation of Heritage activities.

Therefore the Trust targeted developing a strong relationship with a local secondary school. Members of the Trust already had good links with governors at The Academy, a previously failing local school which now had a very dynamic leadership team in place, and made an approach about developing a close working relationship. The governors were immediately interested, many of the children at the school had under achieved in the past, working with the Boleh Project would give these children a unique opportunity to rebuild their self-worth.

The relationship has developed and the Trust and school have recently agreed that the Boleh project will become a focal point of their curriculum, the children will monitor the development of the Boleh Project, using it in their work back in school, and it gives The Academy opportunities to reinforce key messages to the children around diligence and self-esteem. The first official visit from the School is planned for very early in 2013. The partnership with the School was a significant positive teaming which helped the Trust to secure funding from the HLF.

Related to this the Boleh Trust has also worked closely with a well-respected local Training Provider, Highbury College, to identify a number of apprentices who will gain the hands on experience required for their NVQ working with the Boleh. From November four apprentices will join the Project Boleh team and work on the restoration of the boat for four days a week, with one day a week spent on their academic studies.

At a higher education level, links have also been developed between the Project and Southampton University, and this has resulted in two undergraduates using the Boleh as the basis for their Thesis.

What resources were involved (Staff/cash/time)? A huge amount of time and effort from the volunteers involved with Project Boleh. The volunteers have been the main drivers of success.

Who did you work with (Partners/Stakeholders/Friends)? The Trust has worked closely with Portsmouth City Council, Hampshire County Council, the Academy, Southampton University and Highbury College.

What were the timescales? Boleh returned to the UK in 2008, the Trust was set up in 2009, and Heritage Lottery funding secured in September 2012.

What were the benefits/achievements/successes for the organisation? The restoration of the Boleh is now moving forward and will be completed by 2014. Already two apprentices previously involved with working on the Boleh have now got jobs with local ship builders, demonstrating a tangible benefit from the project.

What were the lessons learned, challenges and barriers? The scale of Project Boleh is crucial, it is a relatively small project, therefore getting the right people involved, such as the apprentices, is very important if it is to succeed. Apprenticeship interviews become very important.

Balancing the needs of restoring a historic boat to its original design, while enabling it to be used as a sail training vessel with full MCA compliancy, has to be carefully thought through.

Applicability of the project to the Independent Museums Sector – Whilst the project is not based around a museum or a collection it has relevance to a broad range of independent museums. Schools, Academies, Further Education and High Education Establishments are all being encouraged in one way or another to generate stronger links with local and/or heritage organisations. The material culture that museums care for is a prime resource for educational establishments and one they will be keen to access. The Boleh project specifically used the links with the school to help meet the requirements, and this demonstrates a (relatively) straightforward way that museums can use such engagement to help draw in additional resources. Project Boleh has done this through a small band of volunteers, very dedicated admittedly, but nevertheless demonstrates that other small and medium sized organisations can achieve something similar.

2.6 Micro businesses

Organisation: Leach Pottery - St Ives, Cornwall <http://www.leachpottery.com/>

Contact: Julia Twomlow

Background (What were the reasons for change?): Founded in 1920 by Bernard Leach and Shoji Hamada, the Leach Pottery is regarded by many as the most influential studio pottery in the world. For decades it forged the shape of studio pottery production in the UK and beyond. Today the Leach Pottery is a living tribute to Bernard Leach and his legacy. The organisation was set up without revenue funding, therefore has always been looking to find sustainable ways of generating additional income. However the Director and Trustees were keen to ensure that these new business streams built on the uniqueness of the museum and its location, and with their belief that visitors to such museums wish to take away something which reflects why they have travelled, often very long distances to visit the Leach Pottery.

A brief summary of the activities/work involved: Soon after the Leach Pottery opened 2008 a working pottery was set up to produce tableware for sale to customers. The pottery started up with a lead potter, supported by start-up potters, however the start-up potters were self-employed, paying their own rent, which restricted the amount of direction they could be given and made management of production difficult.

Therefore this system was scrapped and a paid apprenticeship scheme introduced, led by the lead potter. This improved matters, however demand for the tableware increased, and it became apparent that production potters were required to meet the increased capacity. So the Pottery moved to employing two production potters, nevertheless the demand for the pottery continued to grow at the site, and the Museum made the decision to move into wholesale. The Museum set up a partnership with an independent gallery in St Ives to ensure it had a high street location, this has further increased the demand for the pottery, and the Museum is currently considering whether to employ a third production potter.

Increased demand also put pressure on the space available and required that additional storage outside of the main studio was created to free up work space. This was achieved through funding from West Cornwall Local Action Group.

What resources were involved (Staff/cash/time)? The process involved a high level of input from the Museum's Director as well as regular support from the Trustees of the organisation.

Who did you work with (Partners/Stakeholders/Friends)? The Director and Trustees worked closely with the employees at the microbusiness to consider the best options as the business continued to grow.

The Director also brought in the Clore Governance team to help assess the organisation's broader strategy and business model at a time when the museum was facing significant financial problems, Leach Pottery felt this was a very cost effective way of moving to a more sustainable footing.

Charities Aid Foundation provided working capital to enable the transition. Businesslink provided a small grant to support a year of financial mentoring for the director from the Clore finance advisor.

What were the timescales?

What were the benefits/achievements/successes for the organisation? The pottery, and the tableware it produces satisfies the expectations the many visitors have when arriving at the Leach Pottery around being able to take something unique away from their visit linked to Leach himself.

The business has had a sizeable impact on the income generated by the organisation, with the average spend per visitor now reaching £17.50.

This whole process demonstrated how fleet of foot a small organisation such as the Leach Pottery can be, particularly around seizing business opportunities.

What were the lessons learned, challenges and barriers? Business diversification needs to be considered carefully, and can be very time consuming with risks attached, the Leach Pottery also was determined to link any diversification to the core values and story of the organisation.

The museum also feel that the authenticity of both the business and the product is crucial, while they do sell work that is made elsewhere they recognise that most important to their business is the work that is made on site or has a direct connection to the history of the site.

The Leach Pottery also realised that any move into wholesale needs to be carefully considered. Whilst their initial foray into this market has provided them with a high street sales point, it has also impacted on their profit margins and has provided food for thought on how they develop the business in the future.

The museum is likely to target online sales in future now but has fully appreciated the particular implications of moving into this market and, for instance, has already identified spaces to store products for online sale and for packaging the material as well as staffing implications, delivery timescales and meeting customer expectations with handmade work

The buy in and support of the Leach Pottery Board has been crucial, without this things may have proved very challenging.

Applicability of the project to the Independent Museums Sector – The Leach Pottery has a context and a set of assets that are unique, and these have been crucial in allowing the museum to make a success of the micro business. Nevertheless significant parts of this process are transferable to other independent museums. The organisation, with no other revenue sources at that stage, quickly identified the significant opportunities provided by its unusual background, they tried several different ways of building on the idea, and when they recognised things could be improved they were not afraid to try something new. Many museums have a unique object, collection, building or location that can be better utilised with some creative thinking and an understanding of your audiences, as Julia Twomlow pointed out “visitors love taking away something made on site with them”.

2.7 Museum start up

Organisation: Museum of British Surfing - Braunton, North Devon

<http://www.museumofbritishsurfing.org.uk>

Contact: Pete Robinson

Background (What were the reasons for change?): Pete Robinson was originally inspired by reading early publications concerning the history of surfing. He wanted to explore the origins of British surfing and therefore started a journalistic review process in the late 1990s, he began gathering information from publications and periodicals. Pete also started building a collection related to British surfing, buying and gathered a range of material.

Pete, and colleagues with a similar passion, developed a set of touring exhibitions concerning British Surfing from 2004, based in a storage unit. The exhibitions were successful going to a range of exhibitions across the UK, raising the profile of both the topic of British surfing and of Pete and his colleagues.

A brief summary of the activities/work involved: Pete left his job in journalism in 2009, and from this point focused on establishing a permanent museum on the topic. The first action was getting key administrative issues sorted, setting up a charity, and registering the museum name.

The temporary exhibition programme was continued to ensure the profile of the campaign was kept high, and that income was steadily generated.

Pete and his colleagues looked at a series of potential locations for the Museum across Devon and Cornwall. Eventually they came across a parish council owned building in Braunton, and were able to secure a 74 year lease on the property. It included Braunton skate bowl and the local youth club run by Devon County Council. It also provided the opportunity for the museum to expand in the future if required.

The next target was to secure the necessary resources to develop an effective business plan, Pete and his colleagues looked local and were able to secure funding

from the Leader 4 Torridge & North Devon programme – part of the Rural Development Programme.

The funding allowed them to complete a thorough business plan, initial design work including re-branding and the website, plus economic, environmental and project planning.

This robust planning process enabled Pete and his colleagues to secure further investment from the Leader 4 programme. In 2010 they were awarded £145,775 as funding towards Phase 2 – the physical design & build of the exhibition & event venue at The Yard in Braunton.

Match funding was sought through a vigorous fundraising campaign at a national level using social media outlets such as Facebook and Twitter, and a large chunk was secured by a grant of £45,000 in 2011 through the Section 106 fund allocated to Braunton and administered by North Devon Council.

Pete then donated his extensive collection to the Charity set up to run the museum, this generated further confidence in the future of both the museum and the charity itself amongst supporters and stakeholders and further donations both financial and to the collection came in.

During the redevelopment period a project manager was seconded from North Devon Council to support the Charity on a voluntary basis, he focused on the financial side of things and relationships with the grant holders.

The redevelopment included a strong focus on environmental issues, and so a key part of this was developing an effective sustainability strategy, with an ambition for the museum, and charity, to become carbon neutral.

The Museum opened in the spring of 2012, and has been a great success so far, attracting over 6,000 visitors. The business model is working, and the organisation is operating effectively with no external revenue support. It won a Collections Trust award 3 months after opening for the best collection on a small budget, due its sustainability work and commitment to the local community.

What resources were involved (Staff/cash/time)? The drive, passion and large amounts of time from a range of volunteers, particularly Pete Robinson.

The voluntary support from the North Devon Council Manager was very important.

Significant resources were secured from the Leader 4 Programme (<http://www.leader4.org/>), as well as North Devon Council.

Who did you work with (Partners/Stakeholders/Friends)? North Devon Council, North Devon Museums

What were the timescales? Funding for the business planning was secured in Spring 2009 and the Museum was opened in the Spring of 2012.

What were the benefits/achievements/successes for the organisation? The first achievement was the development of the successful touring exhibition programme.

The fundraising campaign was a real success, and demonstrated the benefits of using social media.

Opening the Museum was the main achievement. This was supported by a successful media campaign which Pete Robinson was able to co-ordinate using his journalistic experience.

The museum is underpinned by a sustainable business model, this includes a focus on keeping the visitor product fresh, therefore each year 80% of the displays will be changed in the museum, with those displays removed becoming further touring exhibitions to generate additional income.

What were the lessons learned, challenges and barriers? One of the key challenges for the volunteers was staying patient and resilient in difficult times.

It was important to always have contingency plans in place, for instance the volunteers had alternative locations, and alternative funding streams in mind during the course of the museum development.

It was crucial to get expert/professional support at crunch times during the course of the project, for example utilising the local Museum Development Officer. It was also vital to continually re-emphasise the importance of surfing (and particularly British Surfing) at a national and local level to key stakeholders and supporters.

Applicability of the project to the Independent Museums Sector – The process that Pete Robinson and his colleagues went through has synergies with a large number of other formal and informal groups who have considered, and in some cases gone onto, developing a new museum. The passionate interest in a subject area, location, collection or building, the dedication and perseverance of those involved and the underlying need for funding to make things happen are all common. Those involved in the British Surfing Museum have done a number of things very well. The creation of a clear vision and the development of a business plan not only gave them a clear way forward, but also helped secure the additional funding to make their dream possible. The volunteers have also used their individual skills well, building on Pete's

journalistic background to develop effective social media and PR campaigns around fundraising and the museum's opening for instance.

2.8 Partnerships and Consortia

Partnership: Marches Network – Working across the West Midlands

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

Contact: Chris Copp, Chair

Background (What were the reasons for change?): The Marches Network (formerly the Marches Curators Group) is a long-standing partnership of museums in the counties of Herefordshire, Worcestershire, Warwickshire, Staffordshire and Shropshire, and Wolverhampton Culture, Arts & Heritage Service. The partnership originally started to support the Museum on the Move project which was run across three of the counties. It quickly developed into something broader, as the services began sharing benchmarking, sharing capacity and skills, and acting as a self-help group for the senior officers.

The partnership grew with Staffordshire and Warwickshire joining later on, and more recently the Black Country joined represented by Wolverhampton.

A brief summary of the activities/work involved: At a practical level the Marches Network developed to take on a broader range of responsibilities. One of the key developments was taking on the co-ordination and leadership of the delivery of Museum Development across much of the West Midlands. It has also developed and delivered other projects and activities, including audience research and development projects, pilot activities with the social care and work sector, and specialist curatorial skills programmes.

In 2010 work started to move the informal partnership to a more formal setting, the Network had spotted an opportunity as MLA wound up and ACE took on the lead for Museums.

The Network brought in specialist advice around such areas as business planning, and it developed a memorandum of understanding. This has subsequently allowed the partnership to successfully bid to deliver Museum Development until 2015.

The Network is now considering whether to formalise its legal status in order to allow it to bid for funding from a wide range of funding agencies.

It has now become a conduit between national organisations, such as Arts Council England, and people working at the coalface in the museums sector.

What resources were involved (Staff/cash/time)? Running the network can be very time consuming for the Chief Museums Officers, particularly as the partnership has grown and its responsibilities expanded. However the value for money return on this investment is high.

Who did you work with (Partners/Stakeholders/Friends)? Beyond the six partner authorities the Network has worked closely with the Birmingham Museums Trust, Renaissance West Midlands, MLA, ACE and HLF.

What were the timescales? The Museum on the Move project started in 1996. Staffordshire, Warwickshire and Wolverhampton joined the Museum on the Move partnership in 2008-9, but were already active Marches partners.

What were the benefits/achievements/successes for the organisation? In times of difficulty for a particular museum or service, the other partners step in to take the strain for the Network, and often offer support to the service in need as well.

The partnership has been very successful at drawing in external funding from the likes of MLA, ACE and HLF.

The success of the Network has also raised the political profile for museums within the various services, Councillors are very appreciative of the achievements of the Network. The work they have undertaken has also raised the profile of smaller and independent museums within the areas represented by the Marches members.

Being involved in the Network also allows sharing of learning and skills across individuals and services. Expertise is shared amongst senior museum professionals to develop and manage major projects.

The work of the Marches Network has been a major contributor to improvements in standards of collections care, museum management and audience engagement across the region's museums sector (Fast Forward).

The work has also allowed strong partnerships with some of the largest and most successful museums services in the country such as the Birmingham Museums Trust.

What were the lessons learned, challenges and barriers? The on-going change, budget reductions and reorganisation across local government has placed real pressure on the Network, it has also resulted in regular changes in personnel which has not helped on occasion.

There have been disagreements and differences of opinion, however the honest and open approach at the network has allowed such challenges to be embraced and built on.

The Network has found it challenging to break into new markets such as Health and Tourism, however the partners plan to renew their efforts in the future.

Applicability of the project to the Independent Museums Sector – Many museums are involved in some sort of partnership, network or consortium as part of their day to day business, in most situations involvement in such groupings has become fundamental to the success and sustainability of individual organisations. However it is often difficult to pin down the tangible benefits of being involved in partnerships.

The Marches Network, despite members being local authority run in the main, has a lot the independent sector can learn from. A well-defined structure, with clear responsibilities and links back to the individual museums is vital, along with a mutual assistance approach where other partners step in if one is snowed under or facing internal challenges. The work the Network undertook around business planning and strategic development has proved very positive and had allowed the partnership to develop a more formal status. Defining the Network around an agreed upon set of objectives and projects also provides clarity and a basis on which partners can build on. All of these areas are directly transferable to the independent sector.

2.9 Partnerships with Local Authorities

Organisation: The Royal Welch Fusiliers - Caernarfon, North Wales

<http://www.rwfmuseum.org.uk/>

Contact: Kevin Mason

Background (What were the reasons for change?): The Royal Welch Fusiliers Museum has been located at Caernarfon Castle for more than fifty years and is governed by the Royal Welch Fusiliers Collections Trust (RWFCT). The Trust's reserve collections and offices were located in the Caernarfon Barracks which is remote from Caernarfon Castle and owned by the Ministry of Defence (MoD).

The Trust's occupation of the Barracks was on an informal basis and the MoD suggested a number of years ago that the Trust may need to consider moving out, matters came to a head in 2007 when it became clear that the MoD were seriously reviewing the future of the Barracks. The RWFCT began looking at other sites, but the cost of acquiring or renting an alternative building would have left the Trust having to make huge cutbacks elsewhere.

A brief summary of the activities/work involved: Wrexham is considered by many to be the spiritual home of the Royal Welch Fusiliers and the Trust was aware that Wrexham County Borough Council (WCBC) was undertaking the redevelopment of its museum service. Therefore the RWFCT approached the Council and entered into discussions.

The Trust worked closely with both officers and members of the Council, who were relatively easy to persuade because of the long-standing associations between the Regiment and the town and the opportunity it afforded to bring such a prestigious collection to Wrexham, this fitted well with Council's ambitions to develop a museum service of regional, if not national, significance.

While continuing to maintain the exhibitions at Caernarfon Castle, the Trust offered to loan the Reserve Collections to WCBC, allowing elements to be put on display as long as the Trust could regularly swap items with those currently on view at Caernarfon. In return the Trust would ensure the documentation of the collection was of a suitable standard.

Agreement was reached, and the process of transfer is moving ahead. WCBC have already undertaken a first phase of work at the Wrexham Museum thanks to HLF support. The loan of the reserve collection will strengthen the Council's discussions

with HLF and others as they look to secure funding to carry out a second phase of redevelopment at Wrexham Museum. The reserve collection is now located at a temporary site in Wrexham, formal transfer will take place in January 2013 on completion of a schedule of items to be loaned.

What resources were involved (Staff/cash/time)? WCBC and RWFCT have worked together to share costs during the transition phase, especially in terms of the current temporary housing of the collection. RWFCT also received grant funding from CyMAL (Welsh Government) to support the employment of a cataloguer to deal with the documentation backlog as a precursor to developing a schedule of loan.

Who did you work with (Partners/Stakeholders/Friends)? Wrexham Borough Council, CyMAL and Cadw

What were the timescales? Discussions started in 2007, the formal transfer of objects will take place in January 2013.

What were the benefits/achievements/successes for the organisation? The Trust secured a site for its reserve collection free of charge. Access to the collection will also be enhanced through displays in the current Wrexham Museum which will be improved further as and when the next phase of redevelopment is completed.

The Council has secured a high quality collection of significant local and regional interest.

Because Wrexham has a long standing association with the Royal Welch Fusiliers, the number of volunteers offering to work on the Reserve Collection has markedly increased.

The RWFCT often received a range of enquiries concerning the collection and the Regiment, responsibility for answering such enquiries will transferred to Wrexham Archives who will be applying their standard search charge to any enquiry.

Previously the Curator of the Museum (based at Caernarfon) would spend at least 80% of his time focused on Collections Management issues and enquiries, the transfer means that much of those issues have now been removed, and much more of the Curator's time can now be focused on the public service and education side of the role.

It will also allow the Curator and the Trust to ensure the partnership with Cadw, the Welsh Government's historic environment service, who run Caernarfon Castle, can be strengthened.

The MoD have asked all Regimental Museums to work more proactively with local authorities to reduce the burden on MoD, this fits the bill very well.

What were the lessons learned, challenges and barriers? The nature of a regimental collection meant that the RWFCT had to contend with a wide range of views and concerns as it considered the relocation of the reserve collection. The fact that this plan involved only the reserve collections was a bonus as the Caernarfon Castle display will remain in place, and indeed enhanced as a result of the greater availability of staff resources.

Undertaking such a transfer also places a strong focus on the management of the collections, the Trust quickly realised that they needed to undertake a significant documentation exercise before any move to Wrexham took place. This did require staff time and resources but attracted grant support.

Applicability of the project to the Independent Museums Sector – Developing effective working relationships with local authorities is crucial to the success of many independent museums. To be successful these relationships need to be two way, where benefits accruing on both sides. The Royal Welch Fusiliers project is an excellent example of this, the museum had an immediate set of challenges, but recognised that there was a local authority they already had links with, who has particular ambitions which could assist the museum in overcoming its challenges. Sensitive negotiation was required, and some compromise, but ultimately it has been a success, museums of all sizes can learn from the approach taken by the Fusiliers.

2.10 Social Enterprise

Organisation: Norton Priory Museum and Gardens - Runcorn, Cheshire

<http://www.nortonpriory.org/>

Contact: Lynn Smith

Background (What were the reasons for change?): In 2008 Norton Priory decided to review its catering provision. During some of the winter months, footfall meant caterers struggled to make ends meet. Norton Priory opened up discussions with the local authority, Halton Borough Council, who quickly identified that Norton Priory, and the café site specifically, provided a positive setting for adults with learning difficulties in which to work.

A brief summary of the activities/work involved: Norton Priory already had a long tradition of working with adults with such difficulties and therefore it was a natural transition for the café as well. Country Garden Catering, part of the Council's Adult and Community services department agreed to set up a café, working with a range of adults with learning difficulties. The café was a great success, both with customers and with those who worked in the café. The adults thrived, and were able to blossom in their new working environment.

In 2010 an opportunity emerged to create a separate tea room at the Walled Garden, also part of the Norton Priory site. The approach taken in the café was replicated with the team room, with the majority of the staffing made up of adults with learning difficulties. Again the model has proved to be very effective.

In 2011, after an off the cuff conversation between staff at the Museum about the possibilities of brewing, a Micro-brewery was set up on site, led by a member of staff with brewing experience, but again employing adults with learning difficulties. Also in 2011, Country Gardens Catering set up an Ice Cream Parlour supplying their cafés with homemade ice cream with the potential to utilise produce from Norton Priory's gardens, notably quince for which Norton Priory is the home of the national collection. The developments in the Walled Garden, specifically, the courtyard also included the laying of attractive flagstones, transforming what had been a working yard into a pleasant visitor space.

What resources were involved (Staff/cash/time)? Much of the investment in equipment has been funded by Country Gardens Catering with rental agreements set

in service level agreements with generous terms as business develops, to account for the significant investments made.

Who did you work with (Partners/Stakeholders/Friends)? The main partner has been Country Gardens Catering, part of Halton Borough Council. A steering group with representation from HBC and Norton Priory was set up to oversee the enterprises, and this has worked effectively.

There are Service Level Agreements arranged separately for each of the different services.

What were the timescales? The social enterprises have emerged over a number of years since 2008.

What were the benefits/achievements/successes for the organisation? The work has further improved the relationship between Norton Priory and HBC, allowing the local authority to see Norton Priory as much more than just a museum. It has also provided Norton Priory with a reliable service provider where a private franchise would likely struggle in the winter months. The microbrewery and ice cream parlour are also innovations led by Country Gardens, ideas that were a product of the positive, entrepreneurial attitudes of both organisations.

The new developments have enabled Norton Priory to stretch its season, and improve the product available to the visitor.

What were the lessons learned, challenges and barriers? There were initial concerns amongst some staff and visitors that there would be an impact on the quality of the café and the products and foodstuffs it delivered. However this has not been the case, the visitors are very receptive to the café staff, and the other enterprises more recently set up.

As part of a local authority there is a less business orientated focus, but this has been countered by the steering group ensuring high standards, the stability offered by the alternative working model and by the entrepreneurial attitude of Norton Priory and of Country Gardens.

Country Gardens have also had to learn much in terms of health and safety and environmental health in the production of the beer and ice cream, but again, their success has been a tribute to their positive approach.

Applicability of the project to the Independent Museums Sector – The good work carried out by staff at Norton Priory here is less about the size and scale of the organisation and more about innovation, partnership building and an open mind.

The organisation faced a challenge with its café, its good relationship with its local authority allowed it to develop an innovative solution, and when this proved a success, it expanded and diversified to exploit the opportunity further. Norton Priory was happy to move out of its comfort zone to explore a new way of working and therefore the project is potentially applicable to a wide range of museums in the sector, particularly mid-sized organisations.

2.11 Social Media

Organisation: Shakespeare Birthplace Trust - Stratford upon Avon

<http://www.shakespeare.org.uk/home.html>

Contact: Diana Owen

Background (What were the reasons for change?): More than half of the Shakespeare Birthplace Trust's (SBT) 800,000 visitors every year are from overseas and the collections contain translations of Shakespeare's works in over 100 languages. It is the headquarters of the International Shakespeare Association and has set itself an ambitious vision: to lead the world's enjoyment and understanding of Shakespeare's works, life and times. However SBT was faced with the challenge of developing relationships with actual and potential national and international audiences, to promote 'in every part of the world the appreciation and study' of Shakespeare's works.

A brief summary of the activities/work involved: In 2009 the SBT was fortunate to attract the attention of two social media entrepreneurs and Shakespeare enthusiasts from New York. With the support of Misfit Inc SBT been able to embed the use of social media and blogs across the organisation allowing a huge amount of information to be made available for the first time and releasing the creativity of staff, students and volunteers.

SBT made a strategic decision at the outset to build these skills across the organisation rather than create a specific 'digital' department: the aim is that everyone becomes a 'digital native'. It also chose to create communities of interest around key activities to build audiences for its work .

It has been an organic process reliant on the enthusiasm of individuals rather than driven by a central strategy. SBT also enlisted the support of others as bloggers and participants in its on-line campaigns and exhibitions e.g. staff and postgraduate students at a range of UK and international universities, actors & celebrities, visitors and participants in SBT's education programmes, the RSC and the universities of Warwick and Birmingham amongst others.

SBT now has 11 social media platforms plus a website, Facebook, google + and twitter accounts. Some blogs are related directly to specific sites (e.g. <http://livingshakespeare.com/> at the Birthplace), others are campaigns (<http://60-minutes.bloggingshakespeare.com/>) and others are platforms through which to share research, record and discuss contemporary Shakespeare productions and events (e.g.

<http://yearofshakespeare.com/>). SBT's teams post daily and weekly on the main blogs, www.blogginshakespeare.com and www.findingshakespeare.co.uk. They also use Yammer as an internal facebook-style intranet, saving a significant annual cost. All corporate policies and processes are accessed through Yammer and staff share information events through this platform.

What resources were involved (Staff/cash/time)? . The biggest resource was staff time to learn how to blog, develop and post content, learn what works and what doesn't.

SBT had minimal cash resource to support these projects and much of the technical support has been provided pro bono by Misfit Inc. It was able to secure a Technology Strategy Board grant in partnership with Coventry University Serious Games institute & Hewlett Packard which has resulted in an iPhone app – Eye Shakespeare - and the digitisation of a significant part of our collections.

Who did you work with (Partners/Stakeholders/Friends)?

What were the timescales?

What were the benefits/achievements/successes for the organisation? These activities have enabled SBT to reach many more people in all parts of the world than ever before (see example below).

It has allowed SBT to mount international campaigns and raise its profile significantly e.g. the campaign in response to the film Anonymous in 2011 which reached 25 million people and has won media awards. It has resulted in new partnerships and projects with Shakespearians around the world and opened up collections and the knowledge and expertise of SBT's staff for existing and new audiences.

What were the lessons learned, challenges and barriers? SBT realised it had to engage with these new technologies as they are now all-pervasive in people's lives.

Staff and volunteers need to be trained and supported continuously to continue to produce content and access the platforms.

Early enthusiasm can wane without encouragement and support. Access to computers and camera and video equipment is a real barrier as is time to create content. It needs to be seen as part of the day job and not an 'extra'.

As a small charity, SBT relies on the support and goodwill of technology experts and the enthusiasm of our teams and collaborations with partners. Increasingly the

organisation needs to provide a route through all its on-line activities so that they can be accessed easily and so that they are integrated within an overall framework.

Most significantly SBT has created a family of new on-line communities: its next task in to bring that family together around the Trust's table.

Specific Example - Blogging Shakespeare

Since www.bloggingshakespeare.com was launched in June 2010, SBT has published 623 posts across 18 categories including, 'Acting', 'Books and Film', 'Poetry', 'Real Lives', and 'Theatre'. From 1 June to 30 September 2012, SBT has had 25,392 site visits and 71,444 page -views, compared to 10,714 site visits and 31,383 page-views for the same period in 2011. 138 countries have engaged with the site between 1 June and 30 September 2012, the top ten being: U.K., U.S.A., Canada, Australia, India, Germany, Spain, France, Argentina, and Italy.

The main site for major SBT projects including:

www.60minuteswithShakespeare.com

www.shakespearebitesback.com

www.gettingtoknowShakespeare.com

www.yearofShakespeare.com

Five webinars, four sponsored by publishers: Arden Shakespeare, Cambridge University Press, and Oxford University Press. SBT has 93 occasional contributors.

Applicability of the project to the Independent Museums Sector – The Birthplace Trust is a large organisation and has developed a wide range of social media platforms. The organisation was also fortunate to secure the help of experts in this field, other independent museums may not be able to secure such help or quite have the resources the Birthplace Trust has. However the approach adopted by the Birthplace Trust should be applauded and there is much to learn. The organisation realised that effective use of social media and the web was crucial to the delivery of its broad objectives, the same is likely to be true for many other museums. The Museum has been prepared to try out innovative new virtual initiatives, building on those that succeed, dropping those that didn't. The approach of building skills across the organisation also sounds profoundly sensible, it is crucial that the use of such technologies is embedded and not seen in a silo both to improve the way that museums operate as well as engaging effectively with a wider range of audiences.

2.12 Taking on Services from Local Authorities

Area of Practice: Woodhorn Museum and Northumberland Archives – Ashington, Northumberland <http://www.experiencewoodhorn.com/>

Contact: Keith Merrin

Background (What were the reasons for change?): Woodhorn Museum and Northumberland Archives (WMNA) had already moved to trust status when Northumberland County Council went through local government reorganisation in 2009, resulting in seven local authorities being reduced to one. The new Northumberland County Council had inherited three museums (Berwick Museum, Hexham and Morpeth) during the reorganisation and because it had recently divested its museums and archives function to the Woodhorn Trust it had little capacity to oversee the museums effectively. There was also a strong driver at the Council to secure further financial savings.

A brief summary of the activities/work involved: WMNA approached Northumberland Council in 2009 offering to take over the running of the three museums. WMNA were able to offer both the expertise in running museums, and financial savings because of the critical mass and services Woodhorn already had in place. Northumberland Council agreed to WMNA's offer in February 2010 and, because they had already been through the legal and financial mechanisms of transferring Woodhorn to trust, were able to finalise the transfer of the three smaller museums by August 2010.

WMNA was quickly able to secure additional funding to support aspects of the new sites' delivery

What resources were involved (Staff/cash/time)? Senior level negotiation input in the first instance.

There were also some one-off investments made to put in place new IT equipment etc to enable Gift Aid ticketing which has paid back over time.

It required having a track record in delivering effective museum services, and other services such as Northumberland Archives. It has obviously increased the administrative burden on the core team at Woodhorn.

Who did you work with (Partners/Stakeholders/Friends)? The success of the project needed successful high level engagement with senior offices and members of Northumberland Council, this involved time and effort from Woodhorn's Director

and a number of trustees. WMNA already had very strong links with the LA which helped significantly.

What were the timescales? Initial approach to the Local Authority in 2009, the museums were transferred over by August 2010.

What were the benefits/achievements/successes for the organisation? In the first instance it was important just to stabilise the three museums, and to ensure they were running effectively. This was achieved relatively quickly. There are now visible signs of improvement across the three new sites.

There were straightforward financial benefits, such as savings on the business rates of the three inherited sites, as well as other budget reductions, because WMNA already had most of the front and back office structures in place.

Woodhorn has also been able to bring its wider capacities to bear to assist the three new sites in their day to day development, in such areas as programming, as well as in other less predictable scenarios such as when Berwick flooded recently.

The profile of WMNA with Northumberland Council as a trusted supplier of services was increased further by the successful transfer, this has resulted in WMNA recently taking on the delivery of an events programme across Northumberland's libraries with additional funding.

What were the lessons learned, challenges and barriers? There were some specific issues with the three museums which needed dealing with, such as the need to bring Berwick up to accreditation standard which involved input of resources.

There was also a need for a cultural shift at WMNA as it went from being a one site organisation to a multi-site service.

It was important to agree the parameters of WMNA's role in relation to certain services that had been delivered previously from the museums i.e. community usage of rooms and oversight of other historic properties nearby which the Council took for granted would continue. In these grey areas there can be assumptions made which could have been onerous on WMNA and necessitated further discussions to avoid unrealistic expectations.

Applicability of the project to the Independent Museums Sector – Clearly not all independent museums can take on the running of other museums or groups of museums in the way that Woodhorn did, however the manner in which Woodhorn engaged with Northumberland Council has transferable aspects to many museums. Woodhorn had an existing close and proactive relationship with the local authority,

and identified a challenge for the Local authority which it could help with. By offering a solution to the challenge the museum has further raised its profile with both officers and members, emphasising its position as a trusted deliverer of services, smaller and medium sized museums could adopt a similar role in other local authorities, particularly with the assistance of museum development officers.

2.13 Volunteering

Organisation: National Maritime Museum Cornwall – Falmouth

<http://www.nmmc.co.uk/index.php?/aboutus/content/volunteering>

Contact: Linda Frost

Background (What were the reasons for change?): The National Maritime Museum Cornwall (NMMC) opened in October 2002. Involving volunteers was part of the plan right from the start. NMMC wanted to engage with the local community and knew that it would never be able to run a modern museum in Cornwall with a fully staffed operation. The Museum had grown out of a small volunteer-run museum and so there was a dedicated core on which to build.

Whilst the majority are retired people, NMMC also welcome volunteers who want to gain skills and confidence before returning to work, long term unemployed people in need of experience or students looking for a good line on their CV. There has been a growth in the number of students seeking voluntary work in recent years. Some stick it out better than others and NMMC's investment has a correspondingly short or long payback. Those that give the museum two or three years, or a short-sharp shock of several months, get a real first-hand grounding in the work of a museum, often one-to-one with a member of staff.

A brief summary of the activities/work involved: NMMC has established a series of volunteer roles in six main teams corresponding to areas of work:

- At the front of house, welcoming visitors and carrying the essential processes of orientation and explanation. This often appeals to those with a lesser knowledge of boats but a strong sense of customer service
- In the galleries, chatting to visitors, doing talks and demonstrations, providing a relaxed security and being on standby in case of a crisis
- In the Library which is fully Volunteer-run where the books are bought and catalogued by Volunteers and where hours are spent answering queries and plugging data into databases to support research projects
- In the workshop, helping to repair boats or managing the fleet, they also assist with the installation of exhibitions when required.
- In the education team, working with school and other parties

- We have since added in a book conservation team courtesy of our local branch of NADFAS. The NADFAS team have volunteered since the museum opened and before. Plus...
- A looser group who work on specific projects alongside members of staff

NMMC believes that volunteers are part of the Museum team and need to feel useful, fulfilled and informed. The Museum attempts to do this by being open with our communication and effective in our appreciation. It provides:

- Monthly reports from the Director
- Monthly volunteer breakfast meetings
- Annual presentation by the Director and exhibitions team
- An e-newsletter with contributions from staff and volunteers
- Copies of press releases before publication
- Volunteer lounge
- Discount card
- Cornish Heritage Volunteers Scheme
- Annual party
- Five and Ten Year Awards
- Uniform

What resources were involved (Staff/cash/time)?

Who did you work with (Partners/Stakeholders/Friends)? Falmouth is fortunate in having a relatively large population of retired people within its catchment area as well as a growing population of higher and further education students. The subject – the Sea, Boats and Cornwall – appealed to local people and there were thought to be plenty of sailors – especially men – who would be happy to help out over the winter, talking about boats or avoiding winter work on their own craft.

What were the timescales? The programme has been in place since the museum opened in 2002.

What were the benefits/achievements/successes for the organisation? Volunteers contribute about 45% of all working hours in the Museum and well in excess of 30,000 hours each year. They have become eyes and ears, having the time to travel around the world, visiting other maritime museums.

What were the lessons learned, challenges and barriers? One of the big tasks in the early days was to ensure that the Volunteers stuck with the organisation after the Museum had opened. There was a real danger that the enthusiasm of setting up the

Museum would wane once it became 'business as usual' and that support would fall away.

An early 'them and us' atmosphere was broken down by a relentless communication programme which focused on personal contact and pastoral care rather than pieces of paper. Many of the elements of this programme are still in use today.

NMMC continues to support volunteers who become ill or leave for health reasons by keeping in touch with them. The museum ensures they continue to feel part of the Museum team by keeping them up-to-date with Museum information. NMMC provides those volunteers who have become ill with an Honorary Membership card, so they can visit the Museum if and when they are well enough.

Throughout the programme there is an implied contract: NMMC provides a social context for some – gossip is a key part of the day - a routine for others; we provide an interesting topic and opportunities to share experience with others.

NMMC's registration form and interview help to ensure that the volunteer's hopes, expectations and skills are a good match for what the Museum needs. The museum has volunteer roles for each department but new roles are constantly evolving, not only to meet the needs of the Museum but to match the skills and experience of a new volunteer, for example, exhibitions research, databases, photographic projects.

NMMC ensures that all volunteers have a clear understanding of their role and the Museum's expectation; they are provided with a task description, induction training, department training and a 'buddy'. It also encourages volunteers to take up offers of other training e.g. book handling, cleaning model boats, archive database.

Applicability of the project to the Independent Museums Sector – The National Maritime Museum Cornwall is a sizeable museum which utilises a very large range of volunteers. Its location, in Falmouth, provides the museum with some fairly unique opportunities to draw in volunteers from a diversity of backgrounds. However there is still a lot that can be learnt from what NMMC is doing by small and medium sized museums. The sector has always acted as a magnet for volunteers, and the manner in which NMMC proactively makes individuals feel part of the workforce, communicating with them at a variety of levels, and ensuring effective pastoral care can be applied at organisations of all sizes. NMMC's effective and targeted induction and training programme is also an excellent example, and having a member of staff dedicating much of their time to volunteer management is also very important. Such a post may be seen a luxury that other museums cannot afford, however there are a range of funding streams currently that might cover the costs of such a post.