

Big questions? Big answers.

SCOTTISH
MUSEUMS
COUNCIL



A guide to issues surrounding
heritage development



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SCOTTISH MUSEUMS COUNCIL



The Scottish Museums Council is the national agency for central government support to Scotland's local museums and galleries.

SMC's mission is to improve the quality of museum and gallery provision in Scotland for the public benefit.

SMC combines strategic leadership for the sector, developing national policies and initiatives, with practical advice and services for members.



Highlands & Islands Enterprise is the government-sponsored multi-purpose development agency for the northern parts of Scotland, which sets the strategic background to the services which its Local Enterprise Companies deliver.

Local Enterprise Companies are locally-based organisations, involving public and private interests, which HIE contracts to deliver its programmes and pursue development in a way that matches local needs.

This publication is the result of SMC and Highlands & Islands Enterprise working together in partnership. SMC would like to express thanks to Karen Fraser, Highlands & Islands Museum Development Officer for her valuable input.

SMC is very grateful to everybody who contributed text for the case studies and images for the illustration of this booklet. Most of the case studies are from small charitable organisations, usually run by volunteers with, in some cases, part-time, seasonal or full time paid staff.

1. Introduction

This booklet is intended to guide and advise anybody who is thinking about getting involved with a heritage project. It is aimed at both those starting new projects (individuals, local history societies, community trusts) as well as those who may be in a position to support or advise new projects (local enterprise companies, local authorities). The advice in this booklet is based on the Scottish Museums Council's experience of working with organisations initiating heritage projects in recent years, mainly new museum developments, and usually initiated by small-scale charitable organisations throughout Scotland.

The Scottish Museums Council is aware of a strong interest in heritage development, as witnessed by the number of enquiries we have for advice and membership. We already have over 200 members running about 350 museums. The climate for development is difficult. Public money is not easily available: existing museums are finding it increasingly hard to meet revenue costs. The Scottish Museums Council is keen to recognise the enthusiasm for, and importance of, heritage development but also urges anybody undertaking new projects to consider how they can be sustained over time and to anticipate hurdles and disappointments along the way.

New heritage projects tend to come from community groups, either community groups that share geographical place or a common interest. These groups are keen to preserve something that they perceive to be of special historic significance.

They are made up of volunteers who hope to create a new resource or facility which will be of benefit to their immediate community and others. If this sounds like you, then *Big Questions, Big Answers* is for you.

In 1999 the Scottish Museums Council produced *The Big Questions*, guidelines intended to help those at the very start of a heritage development project. It suggests, through a questionnaire format (see appendix), a number of areas of responsibility which must be considered before starting out on a project. *Big Questions, Big Answers* replaces this document and explores the issues it raised in greater depth before leading you to arrive at your own answers.

2. How to use *Big Questions, Big Answers*

Often, when people are thinking about developing a heritage project, their first consideration is to open a museum. In this document we highlight particular implications for running a museum and what the major difference is between a museum and any other heritage facility.

Museums enable people to explore collections for inspiration, learning and enjoyment. They are institutions that collect, safeguard and make accessible artefacts and specimens, which they hold in trust for society. (Museums Association, 1998)

This definition, arrived at by consensus amongst the museum profession, is currently used to differentiate a museum from any other type of facility. Museums have one unique function – the collecting of artefacts and preserving them for the future. But is a museum the only option? In fact, the definition above is open to interpretation and there are a host of other ways in which you can achieve your aims.

In *Big Questions, Big Answers* we use the term ‘heritage project’ to mean any short or long-term project (not just museums) which explores, celebrates and marks what people feel to be important to the history of people, places and ways of life. There are many varieties of possible projects; for example interpretive trails, oral history recording, visitor centres, publications, websites, digital archives, CD-ROMs, temporary exhibitions, new museums, retaining traditional craft skills.

Museums are often thought of as centralised buildings with a variety of functions emanating from within. This notion is increasingly being challenged as it is becoming clear that such museums are difficult to maintain and develop in the long-term and also, in some cases, a building can create a barrier (both physical and psychological) to potential visitors.

Throughout this document, we refer to case studies which illustrate a range of projects which reflect the reality of current heritage development, offering a range of interpretations of the museum definition given above. Solutions are endless and only limited by our imaginations. This booklet is intended to encourage a creative response to demand in a climate where resources are severely limited.

Think first, act second

In section 3, we map out the choices and tools which relate to developing a heritage project. In section 4, each of these is illustrated by a case study and the advantages and disadvantages are discussed. (It is essential to read and consider these before defining your project.) The choices you make need to be based on a clear understanding of their short and long term implications. Section 5 outlines the steps for planning your project and section 6 offers useful websites to visit.

By the end of this booklet you will:

- be able to state clearly what you have, what you want to do with it and who you want to do this for
- be aware of the choices that face you and understand their implications
- be able to weigh up the pros and cons of your choices
- be able to draw up a feasible project based on the choices you have made.

3. Getting started

Choices

Tools

A. What do you have?	B. What do you want to do with it?	C. Who do you want to do it for?	D. What do you need to make it happen?
a collection? genealogical information? archives? oral records?	volunteering? research? borrowing and lending? create a community focus? create employment? exhibit? interpret?	tourism? visitor services? education?	a building? an organisation? information technology? fundraising? marketing?

What do you want to do and who do you want to do it for?

In this section we ask you to think about what you have, what you want to do with it and who you want to do this for. The table lists a variety of choices; there may be others that you wish to add. It is unlikely that any one project would embrace all these choices. Instead, it is important for you to consider each one and think about whether or not it will help you attain your overall purpose and will be relevant to the people your project is designed to reach. It is crucial therefore that, before you begin, you have a clear idea of the purpose of your project and who it is aimed at.

A combination of the choices above will form a project concept. Whether a building is necessary to contain this project is a decision which has important consequences which will be explored in more detail in section 4, Choices and their implications. To help you think about the choices that lie ahead section 4 consists of a variety of case studies. Learning from the experiences of others will help to inform your own decisions.

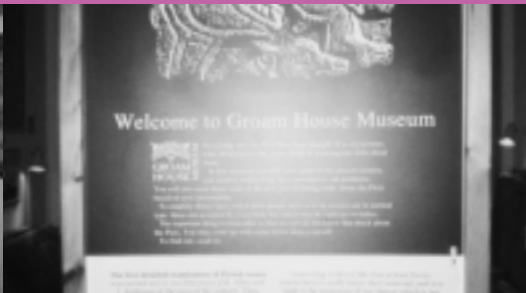
The tools – what you are going to need in order to make it happen – are not choices. Setting up an organisation to run the project, raising funds to pay for it and marketing it to let people know about it are absolute essentials. Buildings and/or information technology can provide the infrastructure for delivering your project.

4. Choices and their implications

In this section, we give an explanation of each of the choices listed in section 3, before going on to outline the implications attached to each, which in turn should influence the decisions you make when developing your project. The choices you make now will have implications for the future. It is important to think through the consequences before planning your project.



Groam House Museum



Groam House Museum



Kilmartin House

A. Making choices: what do you have?

A collection

You may acquire a collection as the result of an accumulation of historically significant or interesting objects which has taken place over time, such as the private collection of an individual. Or a collection may result from changes in the community, for example the loss of an industry or a way of life. This collection could be complete in which case your priority is to provide a safeguard for it. Or collecting may

continue, through donations, and or purchases in which case you will need to think about developing a policy for collecting, based on the geographical area and time period from which you want to collect and the limitations of your storage space and resources. You must also think about whether your collecting intentions will compete with those of existing museums.

The MacDougall Trust, Oban

The MacDougall Trust was formed in 1996 to take care of a collection of Scottish highland and island folk life gathered by Miss Hope MacDougall of MacDougall. The Trust initially considered opening a museum in Oban. A feasibility study was carried out and the whole plan looked marvellous. However, it became depressingly clear that the climate was wrong for an expensive project, and the Trustees were left with two options: a) invest months of effort into a longshot lottery application, or b) get pragmatic.

Having opted for pragmatic, the MacDougall Trust applied to the Heritage Lottery Fund for the bulk of money for a £89,900 project to document and fully organise the collection, plus an extensive outreach programme working in schools principally but also using the rural 'network' to give talks, have displays at coffee mornings and highland games etc. Two part-time members of staff would run the 3-year project.

Partnership funding fell into place immediately and the HLF gave every penny asked for. The MacDougall Trust has rearranged its administration, forming a management committee to run the project, and an active 'Friends of the MacDougall Collection' (including new volunteers) as a vehicle for fundraising, dispensing information, and helping out with the Collection in the store and at public events. The original Trustees remain as the policy makers.

The MacDougall Project is not a museum, but it will achieve important goals:

- the collection will be set in good order
- schools, local people and interested parties will have access to it
- the profile of the collection will be raised immeasurably
- it will provide a base from which other projects (i.e. SCRAN*, a research post, a touring exhibition) can spring.

Each point strengthens the case for subsequent funding applications, and the project will allow for clear thinking when choosing the exact route to take in the future, based on knowledge of local demand and national priorities. It is also, quite simply, less daunting for a local Trust than the prospect of a multi-million pound development. The MacDougall Trust can grow up slowly, and hopefully make fewer mistakes when the big day comes.

*Catherine Gillies,
Trustee*

* SCRAN – Scottish Cultural Resources Access Network – an electronic collection of over one million records contributed by museums, galleries, archives and media, including images, moving pictures and sound (see the website www.scran.ac.uk).



Bressay

South Lanarkshire Museums Forum*

Background

South Lanarkshire contains several independent museums, a local authority museum and a national museum. There are therefore numerous overlaps of collecting area and subject interest. There had been a verbal agreement between museums in the past but changes in staff, volunteers and trustees at the different organisations, over time, led to confusion.

Aims of the collecting policy agreement

The museum forum set out to create a written collecting policy which all in the museums forum could sign up to. This would mean that the collecting policies of individual museums would complement each other. In the process of arriving at an agreement, museums would formally discuss how collecting areas related to each other, the ethical implications of this and ways of dealing with overlaps.

Process

1. The Agreement was co-ordinated by the Museum Development Officer, South Lanarkshire Council.
2. Following a discussion of the pros and cons, the South Lanarkshire Museums Forum voted to develop a written Agreement by holding meetings of representatives of all museums operating within South Lanarkshire. Representatives would have the authority to discuss and make decisions about collecting policies for their museum.
3. The Museum Development Officer summarised the Collecting Policy of each museum and collated them into one document and produced a map showing geographical boundaries. The summary and map were circulated.
4. Representatives of all the registered museums attended a meeting to discuss the content and terms of the Agreement. The meeting discussed several issues, using the Museum Association's ethical guidelines on acquisition and the Code of Ethics as the basis for their decisions. The main issues were overlapping geographical boundaries; overlapping subjects; Treasure Trove applications; protocol when objects of interest to another museum are offered. The meeting agreed methods of dealing with these situations, based on the Museums Association's guidelines. Some organisations agreed to clarify their geographical descriptions as a result.
5. The Agreement was drafted by the Museum Development Officer and sent to the representatives to discuss with their governing bodies. Following approval by all parties, the final Agreement was signed.
6. The Summary of Collecting Policies and a corrected map were included in the Agreement as appendices. The Museum Development Officer undertook to revise the Summary and map as necessary (that is whenever individual collecting policies are renewed).

*Anita Hogan,
Museum Development Officer*

(*Museums Forum – a grouping of museums, either by geography or by subject matter, coming together to share information, expertise and resources.)



Dollar Museum

Advantages

You are preserving for present and future public benefit. You may be retaining something in the community or possibly saving it from destruction.

Disadvantages

Collections have particular needs. They will need space, furniture and materials for display and storage, as well as people to care for them by maintaining a safe and secure environment. Objects need to be inspected periodically for signs of deterioration. Informed decisions need to be made about their needs.

The formation of a collection should be determined by a collecting and disposal policy. This is a key document. It will set the guidelines for what to collect and the circumstances when removing objects from the collection may be considered as an option. Such a policy must state the subject matter, time span and geographical area from which you will collect and when it is necessary not to collect, due to limitations of storage or lack of resources to care adequately for objects. It should also acknowledge other collections and undertake not to compete with these.

You will need to be able to account for all the objects in your collection. (Remember you are safeguarding them for future generations as well as for now.) This is done by documenting every single object: giving it a number and then attaching key information to that number and recording this, either on paper or on computer. A vast range of information can be recorded, for example who donated it, what is it, where did it come from, what condition is it in? The museum profession has fine-tuned this documentation process over the years and information and advice is freely available, from **mda** (formerly the Museum Documentation Association) and the National Museums of Scotland.

You will also need to decide on a policy for access to objects in your collection: can they be handled and by whom, should they be on display or in storage, can they be loaned out to others? Access needs to be weighed against the need to provide security for the collections and staff and the creation of display and storage conditions that will minimise the deterioration of objects.

As an organisation with responsibility for collections you would need to consider whether or not to become Accredited with MLA (Museums, Libraries and Archives Council). The Accreditation scheme, formerly known as the Museums Registration scheme, has been in operation since 1988 and has been designed to demonstrate that a museum is working to at least minimum professional standards in all areas. Entry to the scheme is voluntary and free but there may be a cost attached to the work required to meet the standards of the scheme. Accreditation is commonly used as a criterion for funding, for example by the Heritage Lottery Fund and by the Scottish Museums Council.

Genealogical information

You may wish to provide assistance for people researching family history. This would mean providing information through access to archives, maps, collections or access to people with local knowledge or directing people to places in your area.

Lismore Historical Society

'The Returned'

Achadhanard – (The High Fields) – they named this little township. There; sheltered from the prevailing 'westerlies' and as yet recognisable, stand mute memorials in stone, lasting reminders of that traumatic period in Highland history known as the 'clearances'. These abandoned homes, in their mouldering dereliction, will always kindle in us a feeling of regret for a lost people.

This was where a son they named John was born to Peter and Janet Keith in 1830, surely an unfortunate era to be born in the Islands and Highlands. The ancient loyalties which – as it were – 'ordered' society had crumbled. In a few short years, Achadhanard was no more: the people were replaced by new immigrants... the 'great sheep' had arrived.

The estate of John Campbell of Combie was sold to William Cheyney WS. Notice was served on the tenants and soon 400 of them would vanish into history... MacDonalds and Keiths, McCorquodales and Carmichaels... crofters, carpenters and fishermen... all gone, many without trace.

John emigrated to Australia, finally settling in the State of Victoria, where eventually he would farm in his own right. Aged forty, he married Margaret Munro – born at Kilmuir, Isle of Skye. Margaret was only aged 19 years. On the farm at 'Donald', Victoria, they raised seven children.

We'll now move on ... 150 years have passed: after eviction, emigration and danger, a descendant of John had returned – Karen Keith (great grand daughter). Together, we looked across the Firth, towards snow-capped Ben Cruachan – a view unchanged from the long-lost days of John's boyhood.

The wheel of fortune had turned at last!

*Domhnall Mac'IlleDuibh,
Chairman*

Dunbeath Heritage Centre

The 'return' of the descendants of emigrants to visit those places in the 'old country' associated with their ancestors is nothing new in the Highlands. A few miles from Dunbeath, just north of the Ord of Caithness, at Badbae, stands a remarkable monument. It was erected by a New Zealander, David Sutherland, in 1911, from the stones of the cottage in which his father had been born and raised. The monument commemorates a community its architect never knew, but which clearly remained important to his father, Alexander, to the end – even, or perhaps especially, after he emigrated to the other side of the world in 1839. In the 1970s, it was another Antipodean, a later descendant, who returned, this time to write the history of Badbae and its monument.



West Linton Historical Association

Today, with a booming interest in family history throughout the world, coupled with the ease of global communication via the internet and affordable air travel, it is perhaps not surprising that 'roots-tourism' has become something of a mass movement. Even in a small crofting and fishing community such as Dunbeath, throughout the summer months barely a week goes by without at least one overseas visitor arriving at the Heritage Centre and announcing that he or she has ancestral connections to the place. Such pronouncements are met with a flurry of activity as box files, photographs, maps and family tree charts are produced and, over a cup of tea or two, information is exchanged and excursions to long-deserted settlements arranged.

Because of the massive scale of emigration in the nineteenth and early twentieth centuries, villages such as Dunbeath could be said to have diasporas of their own. It is sometimes assumed that we in the old country are the sole keepers of knowledge about our local heritage, but each of those emigrants carried their stories and a few treasured possessions with them to the New World and these have often been passed down the generations.

More often than not, we know little of what happened to those emigrants as they made new lives for themselves in North America and Australasia. Thus our meetings with their descendants are tremendous opportunities for acquiring knowledge as well as passing it on, and occasions for re-establishing links with the village's far-flung progeny.

At Dunbeath Heritage Centre we are fortunate in having a dedicated research room where visitors exploring their family histories may access, among many other resources, census, birth, death and marriage, parochial, and estate records. With the help of these returnees, we have been able to compile some very detailed family histories, including old photographs, letters, certificates and so forth. In addition to genealogy-related displays in the Heritage Centre itself, we are developing a family history section on our web site (www.dunbeath-heritage.org.uk) to further encourage diasporan dialogue. Conscious of the often profound nature of these homecomings, we have avoided instituting a charge for research facilities and assistance, preferring to leave the matter to the visitors' discretion.

*Paul Basu,
Design Brief Co-ordinator*

Advantages

If you have access to the knowledge and information required, offering a genealogy service could be of great public benefit as this is an area currently generating a huge amount of interest. It is a service which could be provided via a website and which could generate income.

Disadvantages

Will you have enough staff, time and financial resources to respond to enquiries? How and where will you store genealogical records? Do you have the knowledge, or access to further records, to redirect enquiries that you cannot undertake yourself?

Oral Records

Oral history recording has become increasingly popular as a way of ensuring that individual experiences, opinions, stories, language and accents are collected and preserved.



West Linton Historical Association

The Scottish Borders Memory Bank

The Scottish Borders Memory Bank was forged on two main concepts.

The first was the idea of expanding and enriching the existing historical record with first hand accounts of life and memories associated with artefacts, photographs and buildings. For example, the Scottish Borders museums abound with material from the textile industry and although much research has been undertaken, the power and value of the first hand account has not been fully exploited. Of particular interest were attempts to record history while it is happening.

The second concept was to place the choice of what to record for posterity and the historical record with the communities and individuals themselves. Taking the choice away from curators and placing it within the communities meant that the community at large has ownership of the collecting programme and the resultant records. On a practical level, this meant that it was possible for two members of staff to galvanise the 300 volunteers or more who helped to create the Scottish Borders Memory Bank.

The project was adopted by the Scottish Borders Council in 1998 and was funded until October 2001. Grants were also forthcoming from Leader II and SCRAN. The objective was to create a community-generated archive of living memories and contemporary stories of people linked to the Scottish Borders. The memories were to be recorded in people's own words in their own way, be it through audio or video recordings, text or pictures. The recordings, catalogue and storage were all undertaken using digital technology so that all the issues of holding original material did not arise.

The use of digital technology from the outset meant that the development of a dynamic and searchable website became a logical requirement as soon as funding was secured. An application to the Heritage Lottery Fund was made and a grant was awarded in September 1999. Without this funding from the Heritage Lottery Fund, the website would not have been possible. The Scottish Borders Council provided the matching funding.

Using digital technology has many benefits that outweigh the difficulties. The technology allows preservation of originals by creating working copies; copies can be made without perceivable degradation of quality; material can be shared without threatening the loss or ownership of the original; the digital origination can allow the creation of many resources and income generating by-products. The use and approach to the new technologies is now maturing; the digital environment does not offer a replacement to existing worlds but a place of new and very exciting possibilities.

The legacy of the Scottish Borders Memory Bank is now a permanent digital archive on CD, housed in the Local Archive Centre; several resource packs; a multi-media CD-ROM; and a unique and ground breaking interactive web archive. This is in addition to having had a positive effect on numerous people's lives through volunteer work and professional involvement.

Visit www.memorybank.org.uk

*Wendy Ball,
Project Co-ordinator*



Dollar Museum

Advantages

Recording people's histories, as told by themselves, is a way of safeguarding material that would otherwise be lost. Preserving these records for public benefit is a useful service which creates a resource for future research. Taking part in oral history projects can also help develop stronger links with your community and partnerships with other organisations, such as social services or community education. It can also be of great benefit to the individuals who take part, contributing to their own feelings of self worth.

Disadvantages

Recording oral history is a specialised activity which requires training. Asking people to speak about their past experiences is something which needs to be handled very carefully. The cost and time attached to purchasing recording equipment, documenting and preserving recordings, and making information accessible for research need to be considered.

Archives



West Linton Historical Association

An archive is a collection of documents, photographs, maps and plans collected for preservation for future reference. This can be offered as a resource for research with provision for access and study.

West Linton Historical Association

The West Linton Historical Association started up about twenty-five years ago. Its aims are

- to stimulate a wide and active interest in local heritage
- to encourage care for the environment
- to collect and conserve local archive material and to make it available to the public
- to engage in research of the Lynedale Valley
- to provide an education resource for local children.

The Association arranges a series of winter meetings and lectures with temporary exhibitions in the summer months. These take place within a small room rented from the local authority (who pay for all overheads). The Association also runs an archive containing slides, photographs, maps and documents relating to West Linton and its surrounding communities. The archives are available for consultation by the public, by appointment. Items from the archive often form the basis for temporary exhibitions, with associated privately owned artefacts borrowed for display from local individuals.

The volunteer archivists in the Association seek advice on storage and handling of original material from a curator from the local authority museum service. The small amount of storage space available is now almost full and the Association has reached the point of considering the way forward; exploring the idea of finding larger premises to allow the archive to expand and to offer improved facilities to villagers and visitors.

*Tony Hitt,
Chairman*

Advantages

An archive is a resource for research, preserving historic books, maps, photographs and documents. This can be publicly accessible and can be used as material for researching publications or for interpretation.

Disadvantages

You need to be able to provide adequate space for storage, care, handling and public access. The archive will have to be catalogued in order to be accessible and staff will be required to care for the collection and handle public enquiries. Creating an archive may be a duplication of an existing local authority service.

B. Making choices: what do you want to do?

Exhibit

Exhibitions, both permanent and temporary, are the most immediate way of presenting collections to the public. You may wish to do this through the display of objects, written material and photographs. To avoid opening and maintaining a building in which to display exhibitions, you could collaborate with other existing venues: museums, libraries, local halls.



Kilmartin House

Helensburgh Heritage Trust

Helensburgh Heritage Trust was formed as the result of the actions of one woman, Mrs Betty Humphrey, who gradually built up an interest and support for a project to develop a new museum for Helensburgh. A charitable company was formed in 1995. Early investigations into a suitable building led the Trust to realise that it would not be able to generate enough revenue to cover the costs associated with the upkeep of a building. Instead, they embarked on a series of projects including exhibitions in local halls and churches, the restoration of a commemorative cairn in a local glen, the publication of a book, 'Around Helensburgh' (part of the 'Images of Scotland' series), and the rescue and restoration of stained glass windows from a demolished church. In 2000, the Trust raised money from the Heritage Lottery Fund and

Dunbartonshire Enterprise to install a semi-permanent exhibition on the life of John Logie Baird in the local library. This partnership is being continued with plans for a further temporary exhibition in the library interpreting the development of the town of Helensburgh over the past two hundred years.

The Trust also holds lectures, runs guided town walks and responds to public enquiries. The history of the development of the Trust, articles from previous exhibitions and useful contacts are available on the Trust's website, www.helensburgh-heritage.co.uk

*Dr Anne Gray,
Trustee*

Advantages

Exhibiting is the most direct way of offering public access to collections or information. This is an opportunity to interact with audiences and tell a story. You can raise your profile and increase access through hosting a series of temporary exhibitions, either of your own making or brought in from elsewhere.

Disadvantages

Exhibitions take up a lot of space which is costly to maintain. Creating exhibitions is time consuming and expensive and needs a lot of planning and people power. Space for storage and handling will be required if you want to hire in touring exhibitions. Thinking about who the exhibition is for, and creating displays to suit, is a complicated process. Consider collaborating on an exhibition in somebody else's venue to discover what is involved in setting up and running an exhibition.

Research

You are in a position to research information and share it with others, through displays, publications, websites. You can also provide research facilities for others.



Dollar Museum

Nairn Museum

The Museum collection was started in 1858 when a local doctor, John Grigor, encouraged local people to donate varied and interesting items, housed in various premises on the High Street. It moved to Viewfield House, a Georgian building owned by the local Council, after World War II and was exhibited in four small attic rooms. The Council upgraded the building in 1985, giving the collection the use of larger rooms, and a chairlift was installed to improve access.

In 2000, the Fishertown Museum, which began in 1977, added its collection to Viewfield. At the same time, the local arts group moved from the building, freeing up a large room, and the Council caretaker vacated her flat. With help from a local trust fund, this was converted to offices and workshops, which now include a

family and local history research room, which focuses on Nairnshire. This very popular facility has been run for eighteen months by museum volunteers, and by members of the local heritage group, who have spent the last ten years computerising local records, including census returns and old parish records.

The children's area was an innovation in 2000 and is very much appreciated by all generations, and our monthly exhibitions, introduced in 2001, are very successful and improved our visitor numbers by almost 20%. Looking ahead, we are improving our sales area and hope to have a café.

Visit www.nairnmuseum.co.uk

*Jenny Rose-Miller,
Curator*

Advantages

Research forms a sound basis for everything else you do: from fundraising to exhibitions, dealing with public enquiries and developing an education service. Offering a research facility can add to the public benefit of your project.

Disadvantages

Offering research facilities can be time consuming for staff and requires space and possibly a computer. Having the time to undertake your own research often becomes a luxury when faced with the demands of other priorities.

Create a community focus

Your facility can become a focal point for community activity: volunteering, events, temporary exhibitions, celebrating local events, providing meeting spaces, sharing information, fundraising events. Over time, this focus can help generate a sense of identity for a community.



Granttown Museum

Cordale Housing Association, West Dunbartonshire

This organisation has been active for the past ten years and represents the community of Cordale in the village of Renton. Renton itself dates back to 1715 when the first bleachfields in Scotland were established as part of the textile industry in Argyll. At one stage, up to a dozen firms were based in the area, bleaching, dyeing and printing cloth which was exported to India and West Africa. The demise of the industry caused mass unemployment and today around 75% of the Housing Association's tenants are on benefit. The Association is actively promoting community development and social inclusion on a number of fronts including developing a museum with the Turkey Red Trust, named after a type of dye used in the printing process. This is being done in consultation with the local council and the Social Inclusion Partnership.

The idea for a museum came originally from the community who wanted to see a disused church in the village put to some use and to find a way of remembering the textile industry that had been so important. The Turkey Red Trust was born and received £8,000 from West Dunbartonshire Partnership to carry out a feasibility study for a museum. The aim of the museum will be to raise the awareness of textiles in the Vale of Leven and to create employment and volunteering opportunities. Although a permanent collection is not yet in place, members of the community have been donating material, photographs and stories. The Trust has already secured funding from Awards for All for an exhibition to take around libraries and schools in the area giving the people of Renton an opportunity to see their lives and heritage represented.

*Stephen Singer,
Community Development
Project Worker*

Advantages

Your project can bring a wide range of benefits to your local community, especially if it provides new, needed, facilities. It can foster a sense of identity and pride within a community. Having a strong community focus means it should be easier to find willing volunteers to help. A vibrant, locally supported project is also more likely to be attractive to funders.

Disadvantages

Can you provide a service for everybody in the community? How do you know if you are achieving this? Do you know who your community is? How will you communicate with them? Can you be open at hours which suit your visitors? There is a risk of appearing to be a clique that will actually put others off or you can find that you get diverted from your purpose into other causes, for example local politics.

Create Employment

Sometimes a heritage development is seen as a way of creating new employment. In fact this is very problematic as most struggle financially with no paid staff whatsoever. However, it is possible that in areas targeted for regeneration that employment can be created.



Granttown Museum

Timespan Heritage Centre and Art Gallery

In 1982, the Helmsdale and District Action Committee was formed to address the problem of the deteriorating economy of Helmsdale which had resulted from the declining fishing industry and the partial by-pass of the village by the new A9 road bridge. Helmsdale Heritage Society, and subsequently Timespan Heritage Centre, grew out of a sub-committee formed to consider the possibility of establishing a visitor to encourage tourists to visit the village. Existing local property was acquired by lease from the District Council and Timespan Heritage Centre opened in 1987. The art gallery was added in 1997.

Helmsdale Heritage Society is a registered charity and a company limited by guarantee. It is run by a voluntary board of directors. The Society exists to promote the history of the area and preserve its culture, heritage and artefacts. Another of the board's main constitutional aims is to improve employment and boost the economy of the area.

The board appoints a full-time manager who has responsibility for the day-to-day running of the building and who provides the link between the board and the employees. Investment in the training and management of its staff, board, and volunteers, is on-going and Timespan is preparing to be assessed for the Investor in People award.

Since opening in 1987, Timespan has brought many visitors to the village and this has been of great benefit to the village's economy. More money is spent in local shops and this increased trade creates more employment, which in turn leads to more spending within the area. A more direct benefit has been the employment of people within Timespan itself. A wide range of jobs, both full time and seasonal have been created. Once again, the increased spending power has had knock on benefits for the local economy.

Visit www.timespan.org.uk

*Kari Moodie,
Centre Manager*

Advantages

Your project could keep people and skills in the community. Seeing a heritage project at work can give an alternative role model and options for career development for local people. It can bring new skills into the area through creating training opportunities.

Disadvantages

You will need to be able to comply with relevant employment regulations. The cost of employing staff may be a danger to the long-term stability of your organisation. Before creating paid posts, you must be absolutely clear about the purpose of the post and how (and by whom) it will be managed. You will need to invest in your staff by providing training and opportunities to progress professionally.

Volunteering

Your new development may provide opportunities for volunteering in a wide range of activities supported by a variety of tasks: front-of-house documentation, caring for collections. Your project may be entirely managed and operated by volunteers or there may be a combination of paid and volunteer staff.

Volunteers at the Smith Art Gallery and Museum

The Smith was first opened in 1874. A century later, due to the dwindling funds of the original Trust, the Friends of the Smith was formed with the remit of rescuing and restoring the organisation. Volunteer help and contribution has been an important element in the operation of the Smith since then.

Among the museum's most frequent visitors and users are groups and individuals with much skill and talent, who have been willing to help with projects and tasks which are beyond the Smith's limited resources. For example local societies, which use the museum for meetings, often help out when asked. Student projects are always first rate, and with some pre-planning, can be tailored to the needs of the museum. The knowledge bank of our visitors is large, and those with specialist knowledge have been generous in sharing it. Much of the voluntary work which is undertaken is quite mundane. One volunteer has worked most Fridays for the past two years to index the Smith's contemporary ephemera, housed in twenty volumes of Stirling Notes. Others have catalogued and indexed slides and pamphlets. There is nothing which is beyond the talent and means of our volunteers, from driving vans to painting lampposts, delivering posters and leaflets and providing some of the best finger food in Scotland for Smith openings.

The value of the voluntary contribution to the Smith was brought sharply into focus through the necessity of attempting to quantify it in advance for the purposes of a Heritage Lottery Application in 1999. The valuation came to a significant sum. As the project progressed, contributions of volunteer labour came from all quarters. We ended with a contribution four times the original estimated sum. This was not allowed under HLF's rules, but taught us a valuable lesson in how to recognise, value and evaluate the voluntary contribution, without which the Smith cannot, and does not, function.

The contribution by our volunteers is now identified in our Service Level Agreements with Stirling Council, and in our Forward Plan. The recognition and reward to which they are entitled is highlighted in our Education and Access Policy. Their contribution is so big in every way, that we are about to set up a register, in the style of our museums accession register, to record for posterity this input which makes the Smith function as well as it does.

The opportunities offered by Volunteer Development Scotland through Volunteers' Week for publicising both the volunteers and the museum are welcomed, and will be in our annual events programme for the foreseeable future. These events create their own momentum. Visitors new to the Smith, seeing acknowledgements for display work, paintwork, information and floral arrangements, or met by one of our



Bressay

volunteer gallery guides, are given encouragement to come up with proposals of their own to add to our rich cornucopia of voluntary contribution.

*Elsbeth King,
Director*

Advantages

Encouraging volunteers to support your project has benefits for both sides. For the volunteer, this could be an opportunity to give something back to the community, learn new skills or enjoy the company of others. For your organisation, it is an opportunity to create stronger links with the local community and access a wider pool of knowledge and expertise.

Disadvantages

Volunteers need to be managed just as paid staff; that is recruited, given clear roles and responsibilities, offered training and protected by the same health and safety regulations, legal requirements and insurance.

Borrow and Lend

You may wish to be able to borrow or lend items for the purposes of research or temporary display. If you are doing this, you need to put in place written agreements between borrower and lender setting conditions which will ensure that items are properly cared for during the period of loan.



Grantown Museum

Bressay Heritage Centre borrows items owned privately by local individuals for temporary exhibitions. Displays at Kilmartin House are augmented by loans of archaeological material from the National Museums of Scotland. The Museum of Communication Foundation based in Bo'ness has a large collection in storage, parts of which are loaned to other institutions for display or are put on temporary display by the Foundation at open day events.

Advantages

Borrowing objects from other museums or from private collectors can enhance your own collection by adding depth to it or by filling gaps. It can also be a way of involving the community by displaying items that belong to them and therefore have an immediate relevance to their lives and interests. Lending objects to other institutions can raise your own profile and can lead to additional research which you might not be able to undertake yourself.

Disadvantages

When borrowing or lending objects, you have to be able to ensure that you can provide adequate insurance and security and that items will be handled, stored and displayed in appropriate conditions. Some organisations will only lend if you are an Accredited museum.

Interpret

This term can mean different things to different people. Think of it as using various techniques and media to give meaning, offer explanations, tell stories about people, places, events or objects. The information which you can provide will be available from a variety of sources: the knowledge of people donating objects, local knowledge,

your own expertise, academic research. The techniques for interpreting a collection are many and varied; labelling objects, written guides, guided tours, virtual tours via a website, computer interactives, interpretation boards, live interpretation, artworks, drama.



Groam House Museum

Kilmartin House

Kilmartin House Trust, set up in 1994, runs the Museum of Ancient Culture, the Centre for Archaeology & Landscape Interpretation and is supported by the Kilmartin House Trading Company. After 3 years of volunteer effort the museum, shop and café opened in 1997. Five years on, approximately 40% of the costs of Kilmartin House Trust is supported by the Trading Company and the remaining 60% is made up by short-term grants.

The Kilmartin valley with one of the richest prehistoric landscapes of Scotland, has from the late nineteenth century onwards been subject to numerous excavations of many of its monuments. Many of the artefacts associated with these monuments left the region following excavation to become part of the British national collections. In addition, changes in land-use brought changes to the archaeological landscape, with monuments removed, altered or marooned. The local communities were left with scattered shells of monuments in a dislocated landscape.

Kilmartin House was set up specifically to interpret the landscape and its monuments for both the local communities and visitors to the area. It aims to provide a focus for the interpretation of the area and its history, a place of learning and discovery and a tool for socio-economic development in the local area through job provision, economic revenue generation and local confidence building.

The museum of ancient culture uses interpretation panels, artefacts (most on loan from the national institutions) replicas, models and sound as tools to interpret an entire landscape. The approach is to bring the prehistoric landscape to life, looking at the everyday detail and focusing on activities central to human life, food, music, religion and belief, alliances and war.

A museum ticket is valid for the entire day and from the museum, the visitor is encouraged to go out into the landscape and return to the museum later for further clarification or study. The museum experience is supported by the café, where the menu is based around native and local foods, again extending the themes of the museum, and the bookshop, where visitors can delve into those issues that interest them particularly.

However, this central aim to interpret a landscape has not come without its own problems. The landscape of Argyll, by its very nature rural and isolated from the urban centres, means that the museum suffers problems of extremely skewed visitor numbers, with significant impacts on cash flow. Kilmartin House, as a community development tool, is committed to a year round operation, offering a full time service and full time jobs. To continue to do this, the museum has to devise strategies for coping with fluctuating incomes.



Helensburgh Heritage Trust

The rural location of the museum and the small size of the local communities also mean that development programmes and funds are not always forthcoming. The Kilmartin House response to this lack of revenue funding is to aim for financial sustainability through developing the Trading company and its activities outside Kilmartin House. Financial independence for Kilmartin House looks like one of the best ways to financial stability.

More information on the Trust and its work can be found at www.kilmartin.org

*Dr Deborah Long,
Research Programme Manager*

Advantages

This is your chance to tell a story or to introduce people to new ideas, inspire a sense of wonder and encourage learning by providing people with the means to explore a subject. There is the potential to connect with audiences by involving them, for example by asking people to contribute information or to lend material or to test out your ideas for interpretive media and techniques.

Disadvantages

In order to communicate via interpretation, you need to know who you intend to communicate with. Finding out about your audience or targeting new audiences is a time-consuming but essential business. What is it you want to communicate and how will you do it? What media will you use and are there costs attached to these? Be aware that by communicating with one audience you could be excluding others.

C. Making choices: who do you want to do it for?

Tourism

You may be looking for a way to attract new tourists into an area by providing a new facility or you may be attempting to attract existing tourists, who already visit other attractions in your area, to stay longer.

You may be offering entertainment through the telling of a story or you could be acting as an orientation centre, introducing people to a place or area.



Groam House Museum

Grantown Museum

Grantown Museum, a small, independent, Highland museum offering a wet weather facility for visitors and a focal point for members of the local community, opened to the public in 1999.

Strathspey is heavily dependent on tourism for economic survival and the season is a very short one, although there are various initiatives being put in place to address this problem. Many visitors arrive as part of a coach party. The majority of these groups visit the museum which maintains a good relationship with local hotel and guest house owners. The museum has had to adopt a very flexible opening policy. Group visits out of hours are accommodated whenever possible.

A varied temporary exhibition programme is essential to encourage repeat visits by locals and to attract people who might not otherwise visit. We originate displays by working with local artists or by running projects which result in a temporary exhibition and we take in touring shows such as those available from the National Museums of Scotland.

To help address the problem of the quieter winter months, Grantown Museum offers access to the internet and the use of computers to the public. This service can be used by visitors accessing e-mail etc and by local people who do not have their own computer. We work alongside the local history group who purchased a microfiche reader and printer. We have films of census, births, deaths and marriages in the local parish along with newspapers which are used by genealogists. This facility is used by both local people and visitors. There is a recognised increase in the Highlands in the demand for this facility and it is one that we hope to build on by increasing the material currently on offer.

Visit www.grantown-on-spey.co.uk/museum.htm

*Molly Duckett,
Curator*

Advantages

Positioning yourself as a visitor attraction can bring money into the area and create spin-off benefits for other local businesses. To tap this potential, it is useful to think about joint marketing and ticketing with other attractions or businesses.

Disadvantages

Custom from tourists is likely to be seasonal. You need to be able to meet the high expectations of tourists – the importance of customer care here is vital. You should be able to offer information in a variety of languages, targeted at the nationalities of people known to visit Scotland as well as meet the needs of local and UK visitors. Too much reliance on tourism as an income stream is dangerous, as trade fluctuates. Scotland has an ever-increasing number of visitor attractions without rising visitor figures to match so supply is outstripping demand.

Year 1980	Year 2000
401 attractions in Scotland	1,013 attractions in Scotland
30 million visitors	36 million visitors

(STB-Moffat Centre Visitor Attraction Monitor)

Visitor Services

You must always be ready to meet the needs of all your visitors. Public expectations are high so even if you cannot provide an extensive range of facilities, such as toilets, a café, shop, or a website, customer care must be excellent to ensure that visitors are satisfied. (You may also wish to provide additional services such as an enquiry service, crèche, internet access.) The

quality of visitor service you provide is ultimately dependent on the way staff relate to visitors; a friendly welcome and offers of assistance go a long way. Good directional signage and publicity are also vital.



Kilmartin House

Gordon Highlanders Regimental Museum

Training is central to the promotion of customer care in our business. This starts from the top, with the Curator having undertaken the Scotland's Best for Managers course. This is then passed to the staff and volunteers, in an annual pre-season Customer Care training course. All new volunteers and staff are trained in customer care. Between formal training sessions, the standards of customer care are maintained by the management talking informally to volunteers, by praising good customer care and demonstrating high standards themselves.

The Gordon Highlanders Museum is differentiated from other visitor attractions by its standards of customer care, because it is run by volunteers. Our staff, therefore, are here because they want to be, and because they are passionate about the heritage of the North East of Scotland and the history of the Gordon Highlanders. This zeal shows through at all times, and gives the Museum a remarkable atmosphere.

Being a relatively small concern, the Museum only has a limited budget to spend on advertising and other forms of marketing. We therefore rely to a large extent on word of mouth. If we exceed our visitors' expectations, they will tell their friends, and become regular visitors to the Museum.

We like to know that our visitors are happy; it is rewarding to us and in turn improves morale amongst volunteers and staff. We also have the strong traditions and reputation of the Gordon Highlanders to maintain!

The Museum is fully equipped to help our less able guests, and their needs were a primary consideration when the Museum was redeveloped in 1996/7. The Museum has a ramp entrance, a hearing loop, special toilet facilities and low level exhibitions for wheelchair users. The corridors and walkways have been designed to allow wheelchairs to pass through freely, and counters and tables are at the correct level.

Maintenance and Future Plans:

- Standards of customer care are maintained by the formal and informal training methods outlined above, and by sharing results with staff.
- Market research is continually carried out on existing customers to find out their needs and comments.
- All thank you letters are copied and distributed to staff.

Visit www.gordonhighlanders.com

Melanie Brooker,
Curator

Advantages

Good visitor services and good customer care mean that people are more likely to make repeat visits and spread positive commendation by word of mouth.

Disadvantages

Providing a high quality of service is very demanding; this includes offering suitable opening hours, having enough staff to deliver, being physically accessible, promoting and marketing your services, and knowing your target audiences and anticipating their needs.

Education

You may wish to provide learning opportunities for your potential audiences, bearing in mind that education does not have to be for schools only. There are a variety of ways in which you can do this: temporary exhibitions, outreach services, loan kits, quiz sheets, interactive displays.

The service you can provide will be enhanced the more you involve others who already have educational experience, for example your local Primary Adviser or Community Education staff.



Scottish Borders Council Museum Service

Scottish Borders Council Museum Service

From 1996, after the merger of four District Councils into the Scottish Borders Council, the Museum Service has been running a schools education service, built upon existing staff knowledge and experience. We offer a combination of visits, workshops, resource packs and handling boxes for schools. We have no dedicated education staff as such but we have made the delivery of an education service one of our priorities. Funds, additional to the core budget, are generated through grants, subscription fees and loan charges.

The key to delivering our service is that we

- consult with the audience (teachers, education advisers, and pupils)
- design services which allow teachers to make clear links to the curriculum
- inform schools well in advance of events to allow them to work visits into their forward plans
- use our collection (schools want their pupils to interact with real museum objects)
- establish partnerships with Council departments, outside organisations and other museums
- apply for grants
- buy in expertise and employ temporary staff to deliver ambitious projects.

The success of our service is leading us to expand to meet the educational needs of other users beyond schools.

*Shona Sinclair,
Assistant Curator*



Scottish Borders Council Museum Service

Groam House Museum

Pictish Loan Boxes

We knew from museum school visits that teachers felt they did not know enough about the Picts and they believed that there was no relevant literature available. To fill this gap, we sought funding from the Scottish Museums Council and Ross & Cromarty District Council to create loan boxes. The overall cost of the project (in 1995) was £1,400.

Our aim was to present teachers with 'Picts on a plate', a kit that would require no previous knowledge or much additional work from teachers. The intention was to supplement and not duplicate a visit to the museum; to encourage visits to the museum; and to create a stimulating learning aid linked to the 5-14 curriculum. Developing the loan boxes did not get off to the best start as the teacher originally charged with offering advice did not have an empathy with the museum or the subject. In the end, two other teachers provided invaluable input to the production of an activity book to accompany the boxes. Subsequent teachers using the book have commented on its usefulness.

We now have two boxes containing

- dressing up clothes (boy and girl)
- information posters
- back up notes for teachers
- activity book based on items in the boxes
- replica Pictish stones
- replica jewellery
- weaving kit with wool
- associated publications.

The loan boxes are free but teachers are responsible for collection and return - breakages are paid for by schools at cost. Loans are available for periods of 6 to 8 weeks. Both sets have been in constant use since they were launched. They are mainly taken out by primary schools but they have also been used by WRI and special needs adult groups.

After several years of use, we are finding that the contents of the kits are becoming a little tired and could do with being replaced, but we do not have the funds to do this. We have asked schools if they would be willing to pay a charge for the use of the kits but they are not willing to do so.

*Susan Seright,
Curator*

Advantages

Offering an education service is an excellent way of attracting new audiences and raising your profile. Educational activities can help you to reach people who might not otherwise consider approaching you.

Disadvantages

Time: good preparation is essential but very time consuming. You need to think carefully about who your education service is aimed at and what exactly they will need. If working with schools, you need to consider how you will offer something which matches the requirements of the curriculum. You may need to offer additional facilities or staff skills for working with people with special needs.

Collaboration with other organisations can be very beneficial, especially in identifying and developing new audiences but be aware that once you are working with others you can only go as quickly as the slowest player: always consider the time constraints of others when planning and timetabling a project.

D.Tools: what do you need to make it happen?

A building

Buildings for heritage projects must meet a variety of needs depending on what you plan to do. They might include display space, storage, workshop, offices, toilets, café, meetings room, research area, archive, security and the health and safety of visitors and workers.



Top: Dollar Museum

Bottom: Bressay

Bressay

Bressay local history group was formed in the early 1990's in response to the mechanisation of the island's lighthouse. Initially formed to protest against the mechanisation, the activities of the group raised an awareness that local history and heritage was rapidly disappearing and that with the gradual loss of older members of the community a lot of memories and local knowledge were also being lost.

The group needed a workspace and place to gather and thought at first of trying to convert an old building. As nothing suitable was available the group tried to raise funds for a new building. Raising funds proved to be very difficult but eventually £96,000 of European funding was secured.

The centre opened in 1996 and now holds temporary exhibitions during the summer, often using objects loaned by local people, with photographs and local knowledge used to illustrate themes. The group continues to gather local history, stories and oral recordings and offers facilities for talks and slide shows in the winter. The island, which has a population of approximately 400, attracts hundreds of visitors on their way to a bird sanctuary on the neighbouring island of Ness. 1,200 of these visited the centre in 2001. The group decided at the outset not to collect objects for a museum collection (donations are directed to Shetland Museum) because they felt they could not offer appropriate storage and care but this position is reviewed periodically, with occasional advice from Shetland Museum.

*Barbara Anderson,
Volunteer*



Grantown Museum

You may be considering using an existing building. Will it meet all your needs? If considering a new one will the design meet all your needs?

The Museum of Abernethy

The Museum of Abernethy Trust was set up in April 1994 in order to create a museum by converting Mornington Stables, a Grade B listed building close to the heart of the village, near to a Historic Scotland property, the early mediaeval Round Tower, and with a character felt to be sympathetic to the display of artefacts and photographs relating to the history of the village. The Stables are leased to the Trust, in perpetuity, for a peppercorn rent.

When the Trust took over the lease of the building in July 1995, Mornington Stables was in a dangerous state of repair, and the restoration of the building structure to provide a weather-tight building shell was identified as a most urgent initial phase of the museum project. The restoration of the building was designed and overseen by Perth & Kinross District Council Planning Department and necessary repairs were carried out by Scottish Conservation Projects Trust. Perth & Kinross Heritage Trust contributed £60,865 and Scottish Enterprise Tayside £24,500 to the project.

The second phase of the project, supported by a £117,000 grant from the Lottery Heritage Fund with a contribution of £29,000 raised by the

Trust, was the fitting out of the interior of the museum. The Trust took advice throughout the development of the museum from a Curatorial Adviser from Perth Museum, in order to ensure that the museum was designed to provide all the facilities required for storing, handling and displaying collections. The project architect, selected by competitive tender, also had experience in museum design, conservation requirements and converting historic buildings.

The idea for a museum had existed since the early 1980s, but only began to take shape in 1992, when it topped a list of conservation projects in a local survey: this was partly in response to a perception that Abernethy was facing a period of major change with significant new housing developments likely to alter the character of the village, and partly in response to the gradual loss of local historical knowledge and material as the older generation of the community passed away. In 1992 it was anticipated that the project would take two to three years to complete. The museum opened in May 2000.

*Alexandra Nickell,
Volunteer*

Advantages

Being based within a building has the obvious advantage of bringing all your activities under one roof and providing a visible, physical attraction. It offers you the opportunity to create an ambience and a public image. Your project could save a building otherwise under threat and you could combine with other partners to offer other facilities needed locally.

Disadvantages

Bills have to be paid: heating, lighting and insurance at the very least. Maintenance costs have to be met – these can be high in older buildings. The building needs to suit your purpose, should be easily accessible and should have the potential to be developed as your organisation grows. Older buildings do not often meet these requirements and, if they are listed, making necessary changes may be prohibited. Finding the funding to create a new building, which would meet your needs, is very difficult.

Information Technology



Groam House Museum

Any new heritage project must plan to use information technology. IT may be the solution for your project or it may be one of many tools you can use to deliver your project.

If you are interested in gathering and sharing information it may be possible to do this by constructing a website or producing a CD-ROM (see Scottish Borders Memory Bank and Helensburgh Heritage Trust case studies) without ever taking full responsibility for the long term care and preservation of objects or archives. However, if you do form a collection you could use IT to interpret and help display the collection, for instance by using touchscreen computers, CD-ROMs or a website. Using IT to interpret collections means that you can offer different levels of information to different users and you can make links to other resources or collections. You can also use IT to hold catalogues of information about the collection. This is a much more powerful tool for staff and also means that you can make

information more easily accessible to the public. And don't forget IT can help you with the business side of your project, e.g. for accounting, marketing, keeping mailing lists and producing in-house publications.

A website can be an excellent marketing tool. You can increase the presence of your organisation by linking your website to others, often for free (e.g. www.24hourmuseum.org.uk). Increasingly information and opportunities are only available online. The ability to use e-mail and the internet improves your access to the wider world and also allows wider access to your own information, which can help overcome the limitations of space, opening hours and staffing levels.

Organisation

If you intend to set up a long-term heritage project you will need to consider setting up an organisation to run it. In the not-for-profit sector, this is likely to be a charitable organisation, either a trust or a company limited by guarantee. Advice on options is available from the Scottish Museums Council or the Scottish Council for Voluntary Organisations and ultimately you should seek the advice of a lawyer. Whatever type of organisation you

choose to become, you must think about how this will be sustained. Can you attract new people to join it as the years go by? Can you find people who have the right skills required to steer the organisation through its lifespan? Arts & Business offers advice and training in the area of board development.

Dollar Museum

Dollar Museum opened in 1988, set up and run entirely by volunteers. With a determined long-term goal of raising standards, the Dollar Museum Trust and Friends of Dollar Museum were set up in 1991. All development work at the museum has been carried out by volunteers, local tradesmen charging minimal costs and with input from a curatorial adviser.

Trustees meet four times a year. Trustees are drawn from the Friends of Dollar Museum, and representatives from Clackmannan Council, the parish church, the local school, the Local History Society, the Dollar Civic Trust and Dollar Community Council.

In addition to this, the Friends committee meets monthly. Members serve 3 years with one third coming off every year (although they can be re-elected) at the AGM. Committee meetings are well attended (12 to 15 people). Meetings are efficient but fun. We have an excellent secretary who produces full and accurate minutes which are circulated to all members (by e-mail or car) usually within a couple of days.

The Friends committee sees to the day-to-day running of the Museum. Friends staff the museum at weekends using a rota system whereby committee members take it in turns to be in charge of the museum for a whole weekend. Two volunteers must be on duty at all times and one of them must be a committee member. The system is flexible to allow people to swap times if they have other commitments.

The Honorary Curator is in overall charge of the operation of the museum and is often available in the museum during opening hours to help with problems should they arise. The Friends committee also produces ideas and manpower for setting up exhibitions, co-ordinated by the Hon. Curator.

We are lucky that as we have become established we have been supported by more than 200 Friends. On the Trustee and Friends committees we have dedicated and enthusiastic people who have given us long or short periods of their lives. It is a big commitment for members to give up perhaps two or three weekends a year to attend meetings and to help organise fund-raising events and exhibitions.

We recognise the need to keep evolving. If we were to reach a point where no new people were being attracted to the museum or where no new ideas for exhibitions or events were being put forward, the museum could lose momentum. So far, luckily, there is no sign of this happening: new ideas are continually being proposed and new committee members are elected at most AGMs.

*Janet Carolan,
Honorary Curator*

Fundraising

Fundraising is essential to keeping your project going. It is a never-ending process for everybody. It will include: raising funds for short-term projects through applications to grant giving bodies and trusts; seeking sponsorship for one-off projects or events; generating income through fundraising events, membership subscriptions, tickets at the door, running a café or shop; looking for support in kind through partnership or free advice;

running a 'Friends' organisation to help with fundraising. A combination of any, or all, of these needs constant attention, planning and sheer hard work and is inescapable as there are presently no guaranteed sources of funding to cover revenue costs.

Fundraising takes a lot of time and work. The process of raising funds from grant giving bodies is particularly demanding and requires a lot of



Granttown Museum

planning time and professional advice. Fundraising locally can be an opportunity to raise the profile of your organisation and encourage people to become involved with your work. Fundraising events can add to the social life of your community.

Crawfordjohn Heritage Venture Trust

The Crawfordjohn Heritage Venture began after a few local people purchased the Old Church (1988). It was decided to try to establish an interpretative centre, a heritage museum to explain the life of country people to the visitor and to relate the past to the present.

The Crawfordjohn Heritage Venture Trust (CHVT) does not own the building but leases it from Crawfordjohn Church Preservation Trust. The CHVT is responsible for insuring and maintaining the building and with the help of the Association of Friends of CHV runs the fundraising activities to raise the funds to be able to assist with this.

Funds are also raised by the annual membership of the Association of the Friends who are mainly people who have visited the museum and who come from all parts of the UK and abroad (lots of family history seekers).

Very few locals participate in the running of the museum but are happy to participate in social events such as the Bingo Nights, Annual Raffle Draw or other events which are thought of as 'fun' events. We try to have at least

four fundraisers per year. This year we are trying a Quiz Night. The Bingo Nights are most popular as an evening that the whole family, from Grannie to 'the weans', can enjoy. The fundraising brings another dimension to museum life but as Crawfordjohn is a small community we have to be aware of other fundraising events that take place so that we can avoid clashing. With hard work and mutual respect we have established a worthwhile fundraising 'venture' within the community.

To be able to organise such events and also to run the museum it takes volunteers and trustees with lots of commitment and time to give (the majority of our volunteers are retired folks).

CHVT has a group of like-minded people who are committed to the project and with a desire to preserve a way of life for future generations, but it is not easy to find such people. Especially some younger people.

*Jess Cairns,
Trustee*

Marketing

Marketing is absolutely vital to the success of your project. Unless you publicise your activities you cannot expect people to take an interest.

Marketing is about identifying what you have to offer (your 'product'), thinking about who your 'customers' might be and then finding the best available means to promote your product.

There is a wide range of techniques you can use, some cheaper than others; leaflets and posters (production and distribution), press releases, advertising, joint publicity schemes with other organisations, events programmes, direct mail, membership schemes. Market research must be undertaken to get a better idea of who your customers are so that you can target

them more effectively and so that you can target gaps in your market. It is also important to evaluate the effectiveness of your marketing to ensure that you are not wasting time and money.

Grampian Transport Museum

The product

The Grampian Transport Museum (GTM) has grown from community volunteer roots (1981) into one of Aberdeenshire's busiest visitor/educational facilities. The museum's mission statement reads: 'The purpose of the museum is to promote an awareness of, interest in, and better understanding of road and rail transport history in its Grampian context.'

The museum's fifty-acre site has been developed to provide facilities for the staging of ambitious open-air events. It includes a licensed road circuit, 350 seat covered stand and a control tower. At least 30% of the seasonal exhibitions (April to October inclusive) within the main building (1000m²) are renewed every year to promote return visitors. The total marketing budget is pitched at 10% of annual turnover.

Market research

From the outset the museum has gathered information from its visitors. For the past eight years this has been to a common format (visitor survey) enabling comparisons to be made and trends identified. Now called 'data capture' this is an absolutely essential activity and underwrites the museum's marketing strategy.

The marketing strategy

The museum's marketing strategy was originally devised in 1987 and has been developed as the museum develops. In many cases marketing considerations have led development. The strategy's aims are:

- To enable the GTM to compete for market share by offering an enhanced range of experiences/activities.
- To adopt a planned approach to the marketing of the developing museum during the period.
- To become more systematic in gathering information in house and from external sources in order to become more market led.
- To maintain and where possible raise visitor numbers.
- To target activity and apply maximum effort to most accessible markets.
- To pitch marketing effort at a level that does not produce unrealistic expectations among visitors, but is sufficiently attractive to promote visits.

The strategy records the current range of marketing activity.

Current marketing activities

The following are only a sample of the entire range of marketing activities taking place at GTM. These are constantly under review and new proposals are examined annually.

Leaflet

The GTM produces a full colour leaflet that is seasonally revised to include all important events and exhibition changes. The leaflet accompanies all mail as routine. Print run in 2001 was 75,000.

Leaflet distribution

The distribution has always been handled 'in house' apart from an experiment in 1996 when a service company was employed with poor recorded results. Volunteer distributors are co-ordinated by a Trustee and offered a generous mileage rate to cover expenses. The distribution area coincides roughly with the perceived catchment (one and a half hours maximum drive time). Feeder Tourist Information Centres and key visitor destinations also receive leaflet supplies.

Group initiatives

The GTM contributes to packages with other local attractions via the Alford Marketing Group and the Grampian Treasures Initiative. Both groups publish a collective leaflet. Both leaflets are selectively enclosed with mailings and the Alford leaflet includes an 'in house' produced events panel.

Advertising

Advertising in the local press is undertaken only in a very small way for the core operation. The seasonal events programme has a dedicated advertising budget for each event pitched at approximately 10% of event turnover.

Press activity

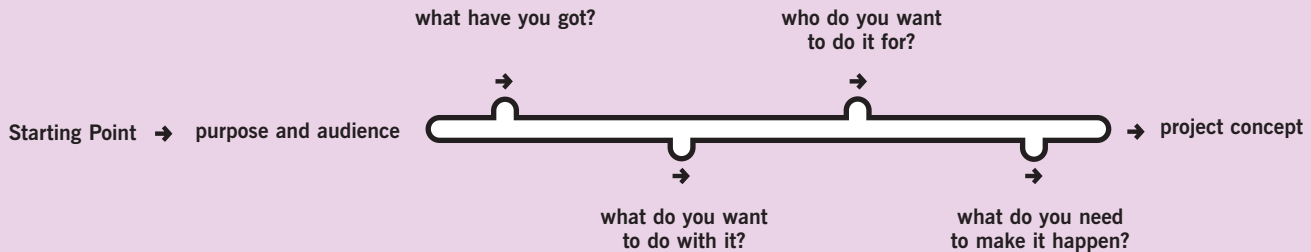
All museum developments, exhibition changes, etc. that are genuinely newsworthy are described in a press release and mailed to a regularly updated press list. The seasonal events programme is also the subject of many releases – average of three per event. Releases are always preceded by a 'phone call to regular press contacts to encourage interest and usually a photograph can be offered to key contacts. The museum also endeavours to provide illustrated articles to the editors of specialist magazines, either complete and ready to run, or in summary form for writing from information supplied.

*Mike Ward,
Curator*

5. Steps towards your project

Step 2

Defining the Project Concept



Identify the project concept

By exploring the choices and their implications in the previous section and identifying which of these best suit your own aims, you will now have a better sense of what type of project will fulfil these aims. This will be your 'project concept'. Considering the implications of each of your choices will help you to set the framework for a plan of action. How exactly are you going to achieve the concept? Do you have the resources to do it? Following the steps outlined below will help you to arrive at a carefully planned and realistic project concept.

Step 1.

Before you attempt to define the project concept, you must decide on your purpose, your ultimate goal. Why are you doing this and who are you doing it for? Whether you intend to preserve a building, create digital resources or provide a home for a collection, the ultimate shape of your project is going to depend on who you are doing it for and why you are doing it. You must have a clear vision before embarking on the project. Remember, potential funders will expect you to be able to express your purpose and the benefits of your project clearly.

Step 2.

Follow the diagram above, discuss the choices you are faced with and how these relate to your audience. Don't force yourself down a route with which you do not feel comfortable. As you go along, list what it is that you wish to be able to deliver as a result of your project and list the management responsibilities attached to each of these. Remember that fundraising and marketing are musts.

Step 3.

With your list, return to section 4, *Choices and their implications*, and consider the pros and cons of each of your choices. Remember that the most important implication for all aspects of the project will be time and money. Try to be as realistic as possible about what you think you can achieve. (You can always start small and add to your project over time.) At this stage it is very important to learn from other people's experiences, by looking at the case studies in this booklet or, even better, speaking directly to other people who have been involved in similar projects. You need to get an idea of where your heritage project fits with other similar developments. You need to get a sense of the importance of your project by comparing it with others. Are you likely to face competition?

Identify useful contacts. A good starting point is your local authority heritage officer or museum service. Seek out somebody who can give you curatorial assistance, if required, during the development stages of your project. Speaking to someone who is already involved with heritage can help for a number of reasons. It can give you an idea of

- where your project fits with other similar developments
- how others view the 'heritage merit' of your project
- the competition, that is other similar projects which may seek to attract the same users as you
- useful contacts
- what curatorial assistance (if appropriate) may be available to assist your project.

Raise awareness of your project in the local community e.g. ask if the project proposal can be put on the agenda of local community meetings such as the community council. This is a good informal way to seek local opinion.

Start seeking advice on possible sources of funding. This is not actually the time to start applying for funds but it is important to find out about the possible options available and what the funding priorities are from each of the possible sources. Funders (and advisers on funding) that you may want to contact in the first instance include Heritage Lottery Fund, the Community Fund, your Local Enterprise Company, and your local authority. The Scottish Museums Council can offer early advice on funding.

Try answering *The Big Questions* questionnaire in the appendix. The results of this will show you if you need to do more preparation before developing the project any further.

Step 4.

Make a final decision on the choices that you have made. Sum these up in the form of a project concept. Now consider how you are going to make it happen? Money is obviously important but finding people who can commit time to the project is equally important. You need to be able to show how you are able to achieve the tasks with the resources that you have. This might be best represented in a brief outline plan with proposed timescale. Decide who is going to manage the project.

At this point, we strongly advise you to seek other opinions – e.g. the Scottish Museums Council, local authority, local enterprise company.

At this stage you may wish to reconsider aspects of your project. There is no harm in this at all, in fact it will strengthen your project and probably result in something more sustainable as you can now show that you have considered other opinions and the overall context for your project development. Make sure that this is your project and not something built on other people's visions.

Step 5.

You now need to gather some extra evidence that your proposal can work. Why not give your proposal a 'test run'? For instance, you might want to try staging a temporary exhibition. This could give a valuable opportunity for feedback from the local community and visitors from further afield. It will also help you gain some experience which may add to your credibility or track record when funders come to consider your application.

Alternatively, you could commission a feasibility study from independent consultants. You may think that this seems an unnecessary expense but there are many reasons why this exercise is in fact worthwhile:

- funders may expect or even require it (that is they will look for an independent survey / opinion)
- this may seem very obvious but it can demonstrate how feasible your project is (that is can the necessary investment in resources be justified in terms of the benefits the project will bring – is there a demand for the project, are there sufficient potential visitors, can the project break even?)
- it can give you an independent and objective view as to how your project could or should develop

- it can highlight areas that you have not yet considered
- it may give pointers as to the weak areas of your project and how these can be addressed
- you may get a better idea of the demand for the project, that is who the potential users are and how many visitors you might expect
- the completed study can act as a very useful guide to your future forward plan
- the process of commissioning and managing a feasibility study will be useful planning experience and can help your group clarify further your purpose.

Based on the experience of others, the following are hints on how to get the most out of working with consultants:

- be as objective as possible (do question the consultant and his / her findings)
- don't let the consultant run you, you are employing him / her
- take time in setting the brief (the Scottish Museums Council can offer advice on preparing a brief)
- speak to others who have worked with consultants previously – ask for references / recommendations

- lastly, make the most of the opportunity! It may well be that others are funding your feasibility study. Make sure that you get the most out of this chance. This study may well form the basis of your forward plan so you need to be happy with it, as you will be working to/with it for many years after the consultant has gone.

Step 6.

The results of your test run and feasibility study will prepare you to write a business plan, an essential for any fundraising. Unless you are already experienced at business planning, we suggest that you carry out background reading, look at online information, and seek Local Enterprise Company and Heritage Lottery Fund advice. It is a good idea to look at funding application forms to see what funders will expect from you. Speak to others about their business plans.

Step 7.

Approach funders. If your planning process so far has been thorough and well thought out, you will be in a far better position to convince funders to support your project.

6. Useful organisations

Background information and useful resources, such as guidance sheets and publications, are available from the following organisations. If you are unable to access the internet, you can contact the Scottish Museums Council's Information Centre for addresses and phone numbers.

Tel 0131 538 7435

Arts & Business

www.AandB.org.uk

Association of Independent Museums

www.museums.org.uk/aim

Convention of Scottish Local Authorities

www.cosla.gov.uk

Links on this website will give you contact details for individual local authorities

Group for Education in Museums

www.gem.org.uk

Heritage Lottery Fund

www.hlf.org.uk

Historic Scotland

www.historic-scotland.gov.uk

Interpret Scotland

www.interpretscotland.org.uk

mda

www.mda.org.uk

Museums Association

www.museumsassociation.org

MLA (Museums, Libraries and Archives Council)

www.mla.gov.uk

Scottish Council for Voluntary Organisations

www.scvo.org.uk

Scottish Cultural Resources Access Network

www.scran.ac.uk

Scottish Enterprise

www.scottish-enterprise.com

Scottish Natural Heritage

www.snh.org.uk

VisitScotland

www.scotexchange.net

Volunteer Development Scotland

www.vds.org.uk

24 Hour Museum

www.24hourmuseum.org.uk

Scottish Enterprise Network

Scottish Enterprise

www.scottish-enterprise.com

Highlands & Islands Enterprise

Cowan House

Inverness Retail & Business Park
Inverness IV2 7GF

Tel 01463 234171

E-mail hie.general@hient.co.uk

www.hie.co.uk

SE Ayrshire

17/19 Hill Street
Kilmarnock KA3 1HA

Tel 01563 526623

E-mail ayrshire@scotent.co.uk

SE Borders

Bridge Street
Galashiels TD1 1SW

Tel 01896 758991

E-mail seb-enquiry@scotent.co.uk

SE Dumfries & Galloway

Solway House
Dumfries Enterprise Park
Tinwal Down Road
Heathall
Dumfries DG1 3SJ

Tel 01387 245000

E-mail sedg.enquiries@scotent.co.uk

SE Dunbartonshire

Spectrum House
Clydebank Business Park
Clydebank G81 2DR

Tel 0141 951 2121
E-mail dunbartonshire@scotent.co.uk

SE Edinburgh & Lothian

Apex House
99 Haymarket Terrace
Edinburgh EH12 5HD

Tel 0131 313 4000
E-mail lothian@scotent.co.uk

SE Fife

Kingdom House
Saltire Centre
Glenrothes KY6 2AQ

Tel 01592 623000
E-mail Fife@scotent.co.uk

SE Forth Valley

Laurel House
Laurelhill Business Park
Stirling FK7 9JQ

Tel 01786 451919
E-mail forthvalley@scotent.co.uk

SE Glasgow

50 Waterloo Street
Glasgow G2 6HQ

Tel 0141 204 1111
E-mail glasgow@scotent.co.uk

SE Grampian

27 Albyn Place
Aberdeen AB10 1DB

Tel 01224 252000
E-mail segrampianenquiries@scotent.co.uk

SE Lanarkshire

New Lanarkshire House
Strathclyde Business Park
Bellshill ML4 3AD

Tel 01698 745454
E-mail selenquiry@scotent.co.uk

SE Renfrewshire

27 Causeyside Street
Paisley PA1 1UL

Tel 0141 848 0101
E-mail renfrewshire@scotent.co.uk

SE Tayside

Enterprise House
45 North Lindsay Street
Dundee DD1 1HT

Tel 01382 223100
E-mail set.reception@scotent.co.uk

Appendix: *The Big Questions*

Preparing for a new museum

The Big Questions

The Scottish Museums Council has designed a set of questions, to help you to see whether or not you have considered all the implications – not only of setting up a new museum, but running it successfully in the long term.

How to answer *The Big Questions*

The tables group these questions into headings which relate to the definition of a museum plus a section examining the sustainability of the museum.

This exercise is best undertaken as a group with somebody keeping note of any points which arise from the discussion. Don't worry if you find that you are ticking lots of 'don't knows'. There are lots of sources of advice and information available for you to follow-up. The point of the exercise is not about scoring highly but it is to find out for yourselves how far your preparations towards a new museum have gone.

1	Public Benefit - museums exist to offer a service to the public.	Yes	No	Don't Know
	Has any local consultation been carried out with other organisations and local people?			
	Are you able to outline the cultural/historical value of the project?			
	Does this duplicate or overlap with something already being dealt with in other museums or visitor centres?			
	If so, have you discussed your project with them?			
	Have you made contact with your local authority museum service to discuss your project?			
	Does the project relate to local, regional or national strategies or plans, e.g. local tourism plan?			
	Is your organisation aware of the Accreditation scheme for museums?			

2	Institution - the 'institution' is the organisation established to own a collection and operate a museum.	Yes	No	Don't Know
	Organisations running museums need to have a legal constitution which states what the museum will do. Have you made progress towards such a constitution?			
	The museum will need a governing body, usually Trustees, which will operate according to the rules of the constitution. Are you aware of all the responsibilities attached to being a Trustee?			
	Will you be able to attract voluntary support to continue the operation of the museum in the future across the full range of its activities, for 5 or 10 years into the future?			

3	Collect - most museums collect actively, either by receiving donations or by purchasing. The type and quantity of objects to be collected must be decided at an early stage.	Yes	No	Don't Know
	Has a collection been formed yet?			
	Will the organisation own the collection?			
	Has your organisation defined what the future collecting policy should be?			
	Have you discussed with others whether this will impinge on collecting undertaken by other museums?			
	Do you have the resources to document the collection (i.e. to gather, store and manipulate information relating to objects in a museum collection)?			

4	Preserve - it is the duty of all museums to ensure that objects on a collection are stored, displayed and handled in a way that promotes preservation.	Yes	No	Don't Know
If you have an existing building in mind do you know if it is adequate for all museum activities, e.g. storage, display, education?				
Does your organisation have, or have access to, the expertise necessary to protect and care for the collection, in the long term?				
Does the building contain suitable storage and display areas with conditions which will not be detrimental to the collection?				
Have you considered the annual costs required to maintain and secure your building with the special conditions which your collection will need?				

5	Exhibit and Interpret - museum collections can be used to illuminate an incredibly wide range of ideas. Time for research, display and publication are vital to successful communication.	Yes	No	Don't Know
Does your organisation have access to knowledge and information about the collection?				
Have you thought about who will be using your museum and what their needs and interests will be?				
Do you have plans for interpreting and displaying the collection?				
Will the museum have room for temporary exhibitions and educational activities?				

6	Visitor Services and Access - visitor expectations are high. It is important to consider who the museum visitors are likely to be and how their expectations can be met.	Yes	No	Don't Know
Has an assessment of the museum's visitor potential been carried out?				
Are your estimates of visitor numbers realistic?				
Have you considered what services you can offer to the local community?				
Are you aware of the Disability Discrimination Act and its requirements to provide access to your museums and services?				
Are there good transport links?				

7	Sustainability - there are a wide range of costs and responsibilities associated with running a museum and maintaining visitor interest. Before setting up a museum, it is important to examine how these will be met in the long term.	Yes	No	Don't Know
Can your organisation generate enough income to run the museum from year to year and into the long term future?				
Does the project have a written Feasibility Plan or Business Plan?				
Have you contacted your Local Enterprise Company?				
Have you contacted your local Tourist Board?				
Have you considered links that your organisation might make with others to increase activity/audiences?				

**If you would like to discuss your results with the
Scottish Museums Council, you are welcome to contact**

Museum Development Manager
Scottish Museums Council
County House
20-22 Torphichen Street
Edinburgh EH3 8JB

Telephone (Switchboard) 0131 229 7465
Telephone (Information Service) 0131 538 7435
Fax 0131 229 2728

E-mail inform@scottishmuseums.org.uk
Web www.scottishmuseums.org.uk

Contact

Scottish Museums Council
County House
20-22 Torphichen Street
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Published by the Scottish Museums Council
May 2002 (reprinted in April 2005)
A large print version of the text is available on request.

A company limited by guarantee No 74264,
recognised as a charity No SCO 15593.



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