

Capturing the outcomes of Hub museums' sustainability activities

Case Study Report

March 2011

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1 Sustainable Museums at London Transport Museum

Aims and activities

The London Transport Museum recently underwent an extensive refurbishment of its Covent Garden site, reopening in late 2007. The major overhaul included several interventions to reduce the museum's carbon emissions. These interventions included:

- Natural ventilation to reduce dependence on air conditioning;
- Enhanced roof insulation to reduce heat-loss;
- Installation of photo-voltaic cells, which generate 16% of LTM's electricity during summer months;
- 'Lutron' energy management system which reduces energy consumption by automating the lighting systems and feeding back information on consumption;
- Improved building management system to control heat, air conditioning and ventilation systems.

The Renaissance-funded Sustainable Museums project builds on these improvements to further reduce carbon emissions at the LTM. The project has a particular focus on back office spaces, complementing the earlier lottery-funded interventions which primarily involved the LTM's public spaces. Following the development of an action plan, the main interventions which are now either implemented, or being implemented, with the aim of reducing carbon emissions are:

- Redesign of the back of house offices to improve the working environment with better ventilation, lighting and heating – whilst enabling greater energy efficiency. The redesign is known internally as the 'One Office Concept', and features open-plan layouts and hot-desking. The environmental benefits of the open-plan layout include the ability to use fewer air conditioners to regulate the air of each space, and the more efficient use of space. For example, the redesign has freed up space for a new education room for public use, in a part of the building previously used for offices. The new education space will complement the LTM's existing lecture theatre by providing a space suitable for more interactive learning.
- Replacement of existing HVAC air-con and heating units (which are soon to become illegal due to new regulations on greenhouse gases). The HVAC units will be replaced with centrally managed Air Handling Units connected to a high efficiency gas boiler.

- Changing domestic hot water system from the current electric immersion system to a new hot water cylinder again powered by the high efficiency gas boiler.
- Other improvements including the replacement of a variety of sky-lights and windows with double and triple glazed units, and the improved insulation of parts of the roof.
- Installation of energy efficient LED lighting across all LTM sites.
- The extension of the existing photo-voltaic array with 56 new cells.

All improvements are underway and are due to be completed by March 2011, drawing on the Renaissance funds. Further works (not funded by Renaissance) will involve new toilet facilities, and the fit-out of the new education space. LTM is currently seeking a sponsor to support fit-out of the education room.

In addition to the above capital investments being made, a 'Green Team' was formed to empower LTM staff to change their behaviour and reduce energy consumption. The Green Team is led by members of the LTM's Environmental Group and meets every few months to discuss issues such as reducing waste and switching off equipment and lights, as well as wider issues around climate change. Films such as 'Age of Stupid' have been viewed during meetings and close links have been developed with Transport For London (TFL) enabling knowledge sharing between the two organisations on the subject of energy efficiency, and visits from TFL staff to the museum.

Stakeholders and value

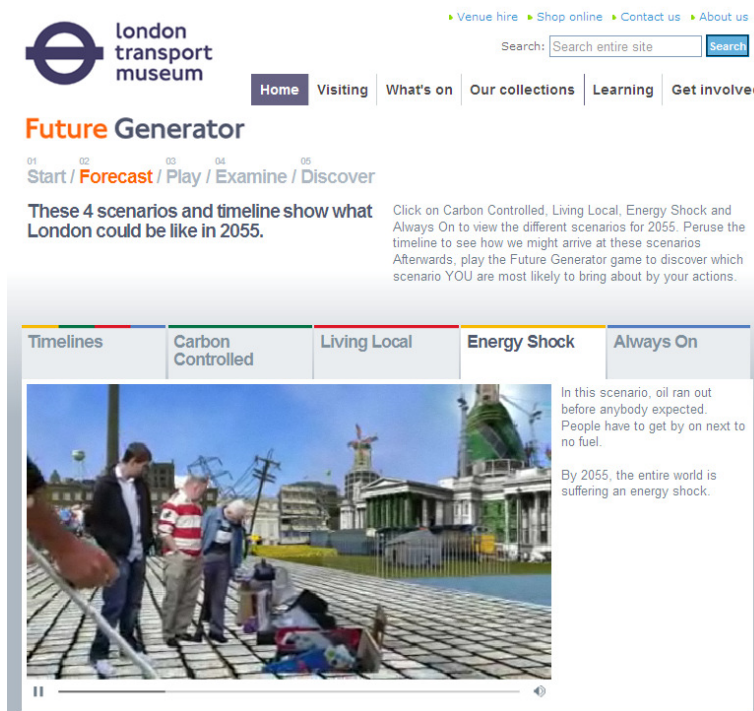
TFL pays the LTM's utility bills, so TFL rather than the museum itself benefits from reduced utility bills resulting from the energy efficiency measures being implemented. As a result, the benefits of increased energy efficiency to LTM itself primarily relate to the museum's desire to be perceived as a green institution by the general public.

Increased environmental sustainability provides the LTM with the credibility that enables it to educate visitors about the importance of protecting the environment. For instance, the LTM's permanent exhibitions include a Future Zone area featuring an interactive exhibit called the Future Generator which explores climate change scenarios for London in the year 2055. The scenarios are built around visitors' responses to a series of questions, and a 3D city environment represents the future the visitors choices would make. The goal is to raise awareness of environmental issues through encouraging visitors to reflect on the long-term environmental implications of the transport and other lifestyle choices they make today. Future Zone highlights the LTM's own commitment by displaying and

explaining the green features of the museum building. Digital read-outs show the current solar power output of the installed photo-voltaic cells and the total amount of CO2 saved. CO2 savings amounted to 37,000kg at the time of writing.

The LTM's environmental achievements are also visible to the public via the LTM's Display Energy Certificate (DEC) rating, which has improved from a rating of 'E' to a rating of 'C'. In addition LTM hopes to upgrade its existing bronze award on the Green Tourism for London scheme, to a silver award at the museum's next assessment. (Green Tourism for London is based on the Green Tourism Business Scheme and is run by Visit London.)

LTM's Future Generator – online version



Challenges, successes and legacy

A particular challenge for LTM on this project was a disagreement with the building's landlord over how roof space should be used. Despite existing plans for the LTM to use the roof to install photo-voltaic cells, the landlord wanted to use the space to fit chillers that would cool a commercial kitchen in a neighbouring property, also owned by the landlord. The problem stemmed in part from the fact that since the landlord doesn't pay the electricity for the building, the landlord does not stand to benefit from energy savings resulting from the installation of photo-voltaic cells. The negotiated solution was for LTM to build a steel framework that could support both the photo-voltaic cells and the chillers. This solution was

favourable for LTM as it enabled installation of a greater surface area of cells than was originally planned.

Furthermore, because TFL rather than LTM pays the utility bills, the museum is unable to directly reinvest energy bill savings into its operations. However this has not prevented improvements from being implemented. For example, despite incorporating as an independent charity in 2008, LTM can still bid into the central TFL budget to fund building improvements. LTM secured funding from this source to install energy efficient lighting following the 2005-07 renovation.

Cost benefit analysis

Cost benefit analysis has been used to capture the financial benefits associated with the energy efficiency measures, as these benefits are straightforward to define and measure. Of course, in addition to financial benefits, the energy efficiency measures result in environmental benefits through carbon emissions. Furthermore, the project delivers educational and brand-related benefits for the LTM due to the role that the project plays in raising awareness amongst visitors about environmental issues and in improving the green credentials of the museum. Such non-financial benefits cannot be easily or robustly quantified and are not included within the cost benefit calculation, but they exist and indeed they could be argued to be the principal benefits of the project.

Stakeholders

The stakeholders for this project are fourfold:

- London Transport Museum;
- Transport for London;
- Museum visitors.

Inputs

The inputs include all up-front financial investment in the project and the staff time committed to the project:

- Renaissance funding of £232,000 which was spent on capital works, equipment purchase and installation, and consultant fees;
- 81 hours of LTM staff time, valued at £1490.

Outputs

- Capital improvements comprising redesign of back office spaces plus suite of energy efficiency fittings and measures;

- Formation of a Green Team to change staff behaviour and reduce energy consumption.

Outcomes

- Improved energy efficiency of museum building
 - 129,600 kWh / year of electricity saved
 - 43,600 kWh / year of gas saved
- Improved credibility and profile for the museum as a green institution
 - Improved DEC rating from category E to category C
 - Possible Green Tourism for London silver award
- Improved staff awareness of green issues and engagement
- Improved visitor awareness of green issues and engagement (particularly understanding of building-based energy efficiency measures and fittings)

Impact Map pt 1: stakeholders to outcomes

Project Sustainable Museums, at London Transport Museum			
Stakeholders	Inputs	Outputs	Outcomes
Transport for London	£232,000 Renaissance funding; 81 hours of other LTM staff time, equivalent to £1490.	Capital improvements to redesign back office space & introduce energy efficiency fittings; Green Team to change staff behaviour and reduce energy consumption.	Improved energy efficiency of museum building.
Museum of London			Improved credibility and profile for the museum; improved staff awareness and engagement.
Museum visitors			Increased visitor awareness and engagement.

Cost-benefit calculation

The cost benefit calculation focuses on the direct financial returns of the project: utility bill savings. Over their lifespan the interventions will yield **£1.02 of benefit for every £1 invested** (see Impact map pt 2). This means that in terms of direct financial return the project will in effect break even. To this must be added the very substantial (but not quantifiable) benefits of the project in terms of:

- Improved credibility and profile for the museum as a green institution;
- Improved staff awareness of green issues and engagement;

- Improved visitor awareness of green issues and engagement (particularly understanding of building-based energy efficiency measures and fittings);
- Experimentation with new approaches and lessons leading to valuable learning for the wider museums sector.

Impact Map pt 2: outcomes and value

Project Sustainable Museums, at London Transport Museum				
Outcomes	Indicator	Financial proxy	Value	Ratio
Improved energy efficiency of museum building.	Forecast reduction in energy bills (129,600 kWh / year of electricity saved and 43,600 kWh / year of gas saved)	Value of reduction in energy bills over equipment lifespan, as calculated by Max Fordham LLP for LTM	£237,500	1.02
Improved credibility and profile for the museum; improved staff awareness and engagement.	-			
Increased visitor awareness and engagement.	-			

Research sources

- Interviews with LTM staff including facility managers Rob Landsdown and Terry Eccles
- London Transport Museum yearbook 2009/10
- London Transport Museum yearbook 2008/09
- London Transport Museum review 2003-06

2 Sustainable Museums at the Museum of London

Aims and activities

The Museum of London's Sustainable Museums project involves a new rainwater harvesting system for the Rotunda part of the museum. This is one of the first examples of such a system being retrofitted to a UK museum: the innovative design won a Green Roof of the Year Award. Planting on roofs is not new to MOL – the garden court roof in the centre of the building dates from 1976 and is one of the oldest in London.

The rainwater harvesting project grew out of MOL's drive to improve efficiency and to modernise fittings throughout the now ageing building. MOL invested £200,000 Renaissance funding plus £50,000 from its own Capital Fund into the new system, which will collect rainwater from 852m² of roof around the Rotunda. This is a prominent public area adjacent to the main entrance to the museum. The rainwater harvester itself is supported by two storage tanks and a UV filter installed in a modified basement area underneath the rotunda, and it is serviced by new pipes and a leak detection system.

Alongside the Sustainable Museums project, MOL is investing £70,000 from the Corporation of London and from its own funds to replace other failing rainwater pipework around the rotunda. This new pipework will connect into the rainwater harvesting system where possible, thereby increasing the rainwater being collected and adding to the effectiveness of the Renaissance-funded project. MOL is also refurbishing the rooms in the rotunda that host corporate hires, incorporating new energy and water efficient features.

Earlier in 2010, the original garden court roof was refurbished as part of the £20.5 million redevelopment of the museum's Galleries of Modern London which retell the story of London and Londoners from 1666 to the present day. The garden court roof, situated alongside the museum's Sackler Hall, has been brought into the 21st century with a versatile waterproofing solution that allows the museum to change the emphasis of the landscape design to fit in with any feature display that is taking place in the surrounding galleries if required.

The driver for all of these projects is MOL's ongoing efforts to upgrade its buildings. Its Sustainable Management Plan, developed in 2009, aspires to improve all three MOL buildings for the benefit of staff and visitors, as well as to address the poor energy rating of the ageing 1970s buildings. The Plan introduced environmental sustainability into MOL. It is supported by a Carbon Trust audit that generated a long list of possible improvements, and a Water Sustainability

Strategy, which the Sustainable Museums project directly helps to deliver. The Water Sustainability Strategy consists of three strands:

- Rainwater harvesting;
- Water conservation fittings to toilets and taps and motion detector to stop urinals from flushing when empty;
- Staff education concerning water conservation.

The project managers believe that there is growing recognition among MOL trustees and senior management of the ethical arguments for environmental sustainability within the museum. The project managers secured buy-in for the rainwater harvesting project by combining these ethical arguments with a financial argument based around the need for investment and the ability to secure external funding. Gavin McCourt, MOL's Facilities and Project Manager, explains:

"We had a long list of repairs that were necessary anyway ... we worked out how to make a business case for going green rather than making straightforward replacements".

The project is expected to further boost the profile of environmental sustainability within MOL. Going green also responds to the MOL's recent change in status to an independent charity, and the consequent need to respond to the Charity Commission's environmental standards.

The museum's original garden court roof, refurbished in 2010



Source: Bauder (contractor) press release

Stakeholders and value

The beneficiary of the project is MOL itself as it gains the new equipment being invested in, and its associated benefits. The principal financial benefit is conferred by the green roof element of the system: green roofs typically increase roof lifespan from 20 to 40 years, thus saving one cycle of the £100,000 roof replacement cost.

The rainwater harvester is forecast to collect over 600 litres of water per day, which would equate to a modest saving of £404 per year on MOL's water bill. The actual amount of water harvested may increase once the additional non-Renaissance funded pipework is connected to the system. It is also dependent on rainfall, of course.

Surprisingly, the scheme has turned out to be carbon neutral. This is because the energy saved via reduced consumption of mains water (which has an energy cost attached) will be offset by the energy required to pump the harvested rainwater around the awkwardly shaped building. However, there is a definite environmental benefit in terms of contribution to flood prevention and to drought prevention. So, despite not being able to deliver the carbon savings that were originally hoped for, the project is helping MOL to meet funders' environmental aims and therefore may help to unlock future investment.

MOL's parent body the Corporation of London aims to install green roofs and / or rainwater harvesting on all their own buildings and has helped to fund to MOL's own efforts. The rainwater harvesting system has also generated interest from Drain London, which focuses on surface water management across London. MOL has submitted a bid to Drain London for £75,000 to fund additional green roofing.

Finally, the project will help to boost public awareness of MOL's growing environmental credentials. The project managers hope in due course to interpret the rainwater harvesting equipment via an external interpretation panel or an internal read-out. MOL has just joined the Green Tourism Business Scheme: the rainwater harvester may help it to upgrade from the anticipated Bronze award, to a Silver award.

The MOL secured the Mastic Concrete Council's Green Roof of the Year Award 2010, due to the innovative design solutions necessitated by the unconventional building. Rachel Williams, MOL's Corporate and Business Planner, sums up the project:

"The project shows you can have the strangest and most awkward building but can still creatively do things".

Challenges, successes and legacy

MOL has delivered a highly visible project that will raise awareness of environmental sustainability within the museum and among its funders, and catalyse further projects. There may be some challenges around communicating the value of the project to the museum due to the modest water savings achieved and to the carbon neutral position. However one of the virtues of the project is its experimentation and the learning it represents: in particular, it demonstrates that the challenge of retrofitting equipment into museums is not restricted to listed historic buildings. The project therefore offers important lessons for the museum sector in general.

The two project managers certainly believe that they have gained re-usable knowledge and competency through the project. Gavin McCourt outlines his approach:

"I'm not looking at current [sustainable buildings] regulations. I'm trying to future proof and look four or five years ahead."

Each London Sustainable Museums project will hold a session to share learning and information from their project once completed with the other regional Hub Museums. The MOL's session is scheduled for early 2011.

The project managers hope to undertake an internal advocacy push that changes staff behaviour staff once the rainwater harvesting is operational – with the ultimate aim for MOL to pull together all its green projects to make a compelling case for environmental sustainability to the museum's visitors, funders and sponsors.

Cost benefit analysis

Stakeholders

The principal stakeholder benefitting from the project is MOL itself, as it directly recoups the water bill savings, and benefits from the defrayed roof replacement costs and from improved profile as a green institution.

Inputs

- £200,000 Renaissance funding;
- £50,000 from the MOL Capital Fund;
- 266 hours of management time supporting the project, equivalent to £8,252 in salary costs;
- Total value of inputs = £258,252

Outputs

- Rainwater harvesting system with supporting infrastructure.

Outcomes

- Water bill savings (equivalent to 232m3 water per year);
- Contribution to flood prevention and drought prevention;
- Increased longevity of roof;
- Improved profile as a green institution.

Impact Map pt 1: stakeholders to outcomes

Project Sustainable Museums, at Museum of London			
Stakeholders	Inputs	Outputs	Outcomes
Museum of London	£200,000 Renaissance funding	Rainwater harvesting system with supporting infrastructure	Water bill savings
	£50,000 from MOL Capital Fund		Increased longevity of roof
	266 hours of management time, equivalent to £8,252		Contribution to flood prevention and drought prevention
			Improved profile as a green institution

Cost benefit calculation

The cost benefit calculation focuses on the direct financial returns of the project: water bill savings and the increased longevity of the roof. Over a 40 year period these will create **£0.45 of benefit for every £1 invested** (see Impact map pt 2). The 40-year time period used in the calculation reflects the long lifespan of equipment fitted: 25 years minimum for mechanical elements of the rainwater harvester, 40 years for the pipework, and 40 years for the green roof.

Impact Map pt 2: outcomes and value

Project Sustainable Museums, at Museum of London				
Outcomes	Indicator	Financial proxy	Value	Ratio
Water bill savings	232m2 water saved per year forecast by ECH2O, consultants to MOL	£404 saving per year over 40 years	£16,160	0.45
Increased longevity of roof	Defrayed roof replacement costs over 40 years	Cost of one replacement roof	£100,000	
Contribution to flood prevention and drought prevention	-			
Improved profile as a green institution	-			

£0.45 of benefit for every £1 invested is not a high ratio, which demonstrates the challenge of achieving major financial returns through retrofitting new equipment into awkward buildings. The ultimate benefit of the project will not be direct financial returns. It will be in terms of:

- Contribution to flood prevention and drought prevention, which are not yet financially rewarded but are nonetheless important;
- Delivering a highly visible project that raises improves the profile of MOL as a green institution, with visitors and funders;
- Subsequent opportunities to source further funding for green projects – for example the current application to Drain London;
- Experimentation with new approaches and lessons leading to valuable learning for the wider museums sector.

Research sources

- Financial and project information from MOL
- Interviews with:
 - Rachel Williams, Corporate and Business Planner, MOL
 - Gavin McCourt, Facilities and Project Manager, MOL
- Ech2o (2010) *Rainwater harvesting at the Museum of London*, scoping report

3 Museums and Sustainability in the East of England

Aims and activities

The project represents a further stage on the journey into sustainability undertaken by the four museums in the Rural Museums East network: Gressenhall Farm and Workhouse, the Farmland Museum and Denny Abbey, Stockwood Discovery Centre and the Museum of East Anglian Life (MEAL). The project builds on the pioneering work which has already won these four museums recognition as sector leaders in terms of sustainability. It demonstrates how similar museums can fruitfully collaborate over the long term to develop sustainability, whilst generating a large volume of learning from the wide range of project activities funded.

The project activities during 2009 to 2011 comprise:

- Gressenhall continues to focus on environmental sustainability: actioning an advanced green audit by Centre for Alternative Technology (to include a new biomass boiler and insulation, low energy lighting, staff behaviour change), a biodiversity push and event programme. Gressenhall is hard to reach by anything other than car, but is experimenting with car sharing, cycling and coaches. Refurbishments to the rooms for hire aim to increase income generating capacity. A parallel capital project (not funded by Renaissance) is creating a new 'Green Gateway' visitor centre.
- MEAL continues to focus on social sustainability with a particular focus on increasing happiness and well-being. Two exhibitions were created with local schools: *Happy Days* and *Trust*, which examined the ties which have historically bound communities in Suffolk. The *Happy Meal* event was aimed at 14-19 year olds, promoting volunteering and considering how to make your life happy.
- Stockwood Discovery Centre developed an evaluation booklet to share its experience of commissioning an advanced green building (the Discovery Centre reopened in July 2008 following a £6 million redevelopment), and of communicating green messages to visitors. A 'Green Champions' group is leading staff behaviour change.
- The Farmland Museum used the Green Museums Step by Step Guide that was developed by the East Midlands region to identify improvements, which it is now implementing: initiatives include loft insulation and introduction of a green policy for volunteers and staff.

The RME museums disseminated their experiences and knowledge to the wider museums community through the *Museums, Sustainability and Growth* conference

in 2010 (funded and coordinated through this project), and by hosting training sessions as part of the parallel Renaissance-funded programme, SHARE.

Inspired by the experiences of the RME museums, 11 further museums were supported in the creation of detailed audits and action plans using the Green Museums Step by Step Guide. The 11 museums were Bishop Stortford Museum; Fakenham Museum of Gas and Local History; Henry Blogg Museum; Hertford Museum; Lowestoft Museum; Mill Green Museum; Nelson Museum; Orford Museum; Stotfold Mill; True's Yard Fisherfolk Museum; West Stow Anglo-Saxon Village.

A series of small grants (up to £2,000) will be made available in late FY2010/11 to support five of these museums to realise the actions.

Green stream' event at Gressenhall Farm and Workhouse



Photo credit: Gressenhall

Stakeholders and value

The four RME museums themselves have been the main beneficiaries from the project, gaining a mix of positive outcomes ranging from reduced utilities bills and carbon emissions, to increased income from hires (at Gressenhall). All four museums have communicated sustainability messages to their staff and to their visitors, gaining their buy in and helping to encourage further sustainable behaviour. Gressenhall's approach to public dissemination is particularly interesting: their current approach is to incorporate green messages into the 'mainstream' events programme and therefore to reach a wide range of visitors. The previous 'stand-alone' green events programme successfully attracted those with an existing interest in environmental issues, but this was felt to be like "preaching to the converted".

The incorporation of all three strands of sustainability into one project makes this unique among Renaissance funded projects; and enables knowledge transfer on a broad range of topics between the museums, and beyond to the wider museums community. The process of knowledge transfer within the RME network is facilitated by the close working relationship that pre-existed between the

museums: for example Gressenhall partly secured Norfolk County Council funding for a new biomass boiler, by being able to cite data from Stockwood.

Although the RME museums' journey into sustainability preceded Renaissance funding, the RME museums credit Renaissance funding with enabling them to go further and deeper into sustainability, achieving a further step change on each site. For instance, Gressenhall staff credit Renaissance's support with assisting them to secure £295,195 matched funding from Norfolk County Council for this project, as well as £620,000 from the Heritage Lottery Fund for a parallel 'Skills for the Future' project. Renaissance funding has also hugely accelerated the dissemination of RME-trialled approaches throughout the East of England museum sector. Renaissance support made the 2010 *Museums, Sustainability and Growth* conference possible and thereby boosted awareness of best practice in sustainability for museums, and of the possible actions that museums could take.

One of the 11 museums being funded to use the Step By Step Guide testifies to the value of this part of the project (and to the involvement of project manager Hannah Jackson):

"We really appreciated the toolkit and Hannah's time... It was good to push through with follow-ups – so many courses are inspirational but you don't get around to doing anything about it."

Site for green build at Stockwood Discovery Park



Photo credit: Stockwood Discovery Park

Challenges, successes and legacy

According to the project leads at the RME museums, the key success factors for the Renaissance project include:

- Progressing capital works, initiatives to boost staff awareness and behaviour, and enhancements to the visitor experience in parallel – thus allowing each element to reinforce and read across to the others;
- Leadership and close involvement by senior management coupled with an inclusive approach based on wider staff 'green' groups;

- Appealing to staff's latent environmental awareness (which is not always put into practice in the workplace) and to the bottom line;
- Regularly feeding back on progress to staff and thus creating a sense of achievement ("We're ahead of the curve");
- Mainstreaming environmental messages into the visitor experience rather than treating them as an add-on.

The project leads believe that the four RME museums are now well positioned to benefit from new pressures and opportunities arising from carbon reduction targets trickling down from national to local government: for example they might access new funding to achieve carbon reduction (which Gressenhall already has) or they could become local 'showcases' for green interventions as their major capital works to date are already generating a lot of public interest and discussion.

Underpinning this optimism is the belief that museums offer a good setting for disseminating messages about the environment as museums are trusted and authoritative, yet neutral with no 'agenda'; and the belief that the agricultural topics that RME museums explore are becoming relevant again in the face of food scarcity and crop biodiversity issues.

SROI analysis

The Renaissance project packages together multiple interventions during the 2009-2011 period, delivering diverse outcomes that range from energy efficiency to earned income and public awareness.

While the incorporation of all three strands of sustainability into the project (and thus the ability to maximise crossover between strands) is clearly beneficial, unfortunately this – along with logistical and capacity issues – also makes it difficult to isolate the data needed for robust project-wide SROI or cost benefit analyses. In brief:

- The majority of funding is allocated on a site-by-site basis and supports multiple activities on each site. It is difficult to separate out the funding and time committed towards achieving each outcome;
- There is limited scope to apply the cost benefit analysis used in this report to assess capital projects, as over the 2009-2011 period only Gressenhall has initiated and completed a capital project, and this project was funded by Norfolk County Council, not Renaissance;
- RME museums have insufficient capacity to survey enough event attendees for a robust analysis of the outcomes for their attendees;

- The environmental audits and the conference do not easily suit a cost benefit or SROI analysis.

The following analysis goes as far as possible within these constraints. It defines the overall project inputs, outputs and outcomes within an impact map; and it cites specific examples of achieving outcomes based on the data that is available and useable. It draws on the specific evaluation work that the RME museums are undertaking for certain project activities.

Stakeholders

- The four Rural Museums East network museums: Gressenhall Farm and Workhouse, the Farmland Museum and Denny Abbey, Stockwood Discovery Centre and the Museum of East Anglian Life;
- The estimated 16,981 participants at RME museums' events and educational activities aimed at raising awareness of sustainability;
- The 11 museums who underwent environmental audits to identify improvements: Bishop Stortford Museum; Fakenham Museum of Gas and Local History; Henry Blogg Museum; Hertford Museum; Lowestoft Museum; Mill Green Museum; Nelson Museum; Orford Museum; Stotfold Mill; True's Yard Fisherfolk Museum; West Stow Anglo-Saxon Village;
- The wider East of England museums sector as represented by the attendees of the Museums Sustainability and Growth conference 2010, and by the 17 attendees of the SHARE training session.

Inputs

- £144,000 Renaissance funding over 2009-2011;
- £295,195 Norfolk County Council funding under its Carbon and Energy Reduction Fund, for capital works at Gressenhall;
- 8,922 hours input by the Renaissance-funded project manager plus 32 hours by the Renaissance Hub manager;
- 293 hours input by project staff at the four RME museums;
- Total financial value of all inputs = £454,114

Outputs

- Capital improvements to increase environmental sustainability and (at Gressenhall) to renovate rooms for hire;
- 11 audits leading to action plans;
- Museums Sustainability and Growth conference and SHARE training session;
- 32 events and educational activities around sustainability issues.

Impact Map: stakeholders to outcomes

Project Sustainability and Museums, in the East of England region			
Stakeholders	Inputs	Outputs	Outcomes
The 4 Rural Museums East network museums	£144,000 Renaissance funding; £295,195 Norfolk County Council funding for Gressenhall; 8,922 hours input from the Renaissance-funded project manager and 32 hours input by the Renaissance Hub manager;	Capital improvements to increase environmental sustainability and (at Gressenhall) to renovate rooms for hire	Reduced utilities bills and carbon emissions, and (at Gressenhall) increased income from hires
The 11 museums undergoing environmental audits and improvements	293 hours input by project staff at the four RME museums	11 audits leading to action plans	Awareness of the specific on-site actions necessary to improve environmental sustainability at these museums
The wider East of England museums sector		Museums Sustainability and Growth conference, SHARE training session	Increased awareness of sustainability issues in general for museums, and possible actions
The 16,981 participants at RME museums' related events and educational activities		32 events and educational activities around sustainability issues	Raised public awareness of and engagement with sustainability issues

Outcomes

- (For RME museums) Reduced utilities bills and carbon emissions, and (at Gressenhall) increased income from hires;
- (For the 11 museums undergoing environmental audits and improvements) Awareness of the specific on-site actions necessary to improve environmental sustainability at these museums;
- (For attendees at the Museums Sustainability and Growth conference and the SHARE training session) Increased awareness of sustainability issues in general for museums, and possible actions;
- Raised public awareness of and engagement with sustainability issues.

Cost benefit calculations

A project-wide cost benefit analysis is not possible, for the reasons above. However some indications of the financial return achieved by parts of the project are provided by:

- Gressenhall saw a 50% increase in takings from room hire in 2009 as a result of the refurbishments of its rooms for hire.
- Gressenhall's capital works are forecast to save £66,538 per year on electricity, gas and water bills, with the majority of these savings due to persist for 20 years due to the long lifespan of the biomass boiler that was installed. This equates to **£3.86 of benefit for every £1 invested** in the capital works, which is a very favourable return. The Project Manager advises that the original forecast may be over-optimistic as it does not include the cost of fuel pellets for the boiler, or take account of possible increases in energy demand around the museum estate. Using the much more conservative assumption that the boiler is cost neutral over its life, the capital works still delivers £1.15 of benefit for every £1 invested. The high variance between the upper and lower estimates demonstrates the challenge of predicting how relatively new and untested equipment will perform in situ, and over the long term.

Detailed cost benefit of Gressenhall capital works

	Metric	kWh or m3	£	Life span
Roof insulation and draught proofing (Quattro seal)	Water saved			Quattro seal 10 yrs; insulation 25 yrs
	Electricity saved			
	Gas / oil saved	203,846	10,192	
	Over 10 years		101,920	
Biomass Boiler	Water saved			20 yrs
	Electricity saved			
	Gas / oil saved	480,769	50,038	
	Over 20 years		1,000,760	
Low energy lighting for display areas	Water saved			5 to 7 yrs
	Electricity saved	52,567	£6,308	
	Gas / oil saved			
	Over 6 years		37,848	
Value (original forecast for Boiler)			1,140,528	
Value (Boiler cost neutral)			339,768	
Investment			295,195	
Ratio			1.15 to 3.86	

Forecast saving p/year by Norfolk Property Services, via Gressenhall

Some indication of the effectiveness of RME events and educational activities in raising public awareness and engagement is provided by the evaluation of Gressenhall's Apple Day event. This found that:

- 9 of the 17 under-16s who responded to the survey would be more likely to buy local as a result of attending the event;
- 16 of the 36 over-16s who responded to the survey felt they would change their behaviour as a result of attending the event including: to buy local, prioritise flavour, eat more apples, and plant an apple tree.

Research sources

- Focus group with:
 - Hannah Jackson, Sustainability Project Officer, Gressenhall Farm and Workhouse;
 - Robin Hanley, Western Area Manager, Norfolk Museums and Archaeology Service;
 - Philippa Laurie, Rural Life Curator, Stockwood Discovery Centre;
 - Jo Rooks, Sustainable Learning Officer, Museum of East Anglian Life
 - Amanda Burke, Evaluation Officer, Renaissance East of England.
- Financial and project information from Hannah Jackson;
- Additional information and quotations sourced from:
 - Jackson H (2010), An integrated approach: the Greening of Museums in the East of England, chapter for forthcoming book Green Museums: sustainability, society and public engagement;
 - Laurie, P (2010) Stockwood Discovery Centre Project Evaluation: Building an environmentally sustainable museum and interpreting it for visitors;
 - Evaluations of specific project strands by RME museum staff.

4 Green Museums, in the North West

Aims and activities

The Green Museums programme is being run directly by Renaissance North West with Collections Care Liaison Officer Kaye Tetlow acting as project manager. As a programme, it is “*part of a nationwide fabric of initiatives and projects*” developed in answer to increasing (legislative) pressure, which is forcing the museum sector to reduce energy use, costs and carbon emissions in order to become more sustainable.

The overall aim of the programme, which runs from February 2010 to February 2011, is:

- To assist museums to become environmentally sustainable by focussing in particular on empowering members of staff to bring about organisational change.

In order to achieve this, the programme was divided into three strands:

- Green Museums Leadership & Development (GML&D)
- Big Energy Saving Initiative (BESI)
- Survival Strategy

In preparation for the first strand, *Green Museums Leadership & Development*, five initial workshops were held in each sub-region of the NW to determine which issues the programme needed to address, and in which shape the programme should be run to make it possible for museums to participate. The three main issues these workshops revealed were (i) museums often do not know what needs changing, i.e. lack of knowledge of environmental issues, (ii) lack of confidence and (iii) lack of time. Consequently, GML&D aims at educating staff on how to enhance the environmental sustainability of their museums by addressing both environmental knowledge and leadership skills to support the implementation of measures. Furthermore, Renaissance

North West's goal is to establish a sustainable museum network in which ideas can be tested, findings transferred, and best practice and learning shared.

Rachel Madan, Director of sustainability company Greener Museums, was commissioned to help develop and run the GML&D strand. Together, Renaissance North West and Greener Museums developed a CPD programme with a rich, blended learning approach which included:

- Access to the Greener Museums Mentor online community, featuring a network forum, case studies and monthly 'tele-seminars',
- In-depth online learning courses on environmental topics developed specifically for the programme (online learning making it easier for museums to take part without travelling and in their own time),
- Three live workshops focussing for example on leadership, communication and making a business case,
- Monthly individual coaching tailored to specific challenges.

The aim of the programme is that each museum would not only be able to conduct environmental audits, but have established a specific sustainability strategy and associated policies/ projects as well as governance, communication and funding plans to put these into action. The developed strategies were based on benchmarking exercises and carbon footprint/ cost assessments completed with the help of a Greener Museums toolkit. Museums provided Greener Museums with data, who in turn supplied the museums with customised Carbon Footprint Charts, Carbon Assessment results and Costs charts.

Starting with an initial 25 museums, this strand will end with 20 participating museums, including large (national) museums such as Liverpool Museum or Manchester Art Gallery, as well as smaller (volunteer-run) museums such as The Wordsworth Museum or Port Sunlight Museum. Although some of the participants were at a senior level, the participants came from various backgrounds including managers, curators and facilities managers, and even encompassed some volunteer staff as well as paid staff.

The second strand, the *Big Energy Saving Initiative*, provided in-depth support for a smaller group of participating museums with the aim of significantly reducing their carbon footprint/ energy usage. The participating museums were also represented on the GML&D strand, resulting in considerable cross-pollination between the two strands.

Lastly, the *Survival Strategy* is an extensive document which was developed by Kaye Tetlow, the Regional Development Steering Group and Arup to build on the Green Museum Step-by-Step guide previously produced by MLA/ Renaissance East Midlands. It aims to provide a "crucial tool for museum staff to use to make immediate and long-term changes towards environmental sustainability" and, to this end, comprises five steps to guide institutions through their development process, assisted by a number of case studies. The Strategy encompasses fully 205 upgrade initiatives, ranging from low cost, quick-win solutions to longer-term schemes. After having been tested by six institutions taking part in the GML&D

strand, it was launched at the MA conference in late September, and was published in October 2010. It is now available to download from the Renaissance North West website.

As both BESI and the Survival Strategy were linked to GML&D – in BESI's case focussing on the implementation of different energy saving measures at a number of selected GML&D museums, and in the Survival Strategy's case, providing a handbook of tools and (GML&D) case studies for wider distribution – the following evaluation will focus in particular on the GML&D strand of the programme.

Stakeholders and value

As the overall programme has taken the approach of bringing about organisational development on the basis of the personal development of participating museum staff, the main stakeholders of the programme are not only the museums as organisations, but also the representatives of each museum themselves. Here, the aim is to develop a cadre of museum professionals who will carry the knowledge and learning that they have gained through the scheme as they progress through their careers, working across a number of institutions.

Professional development of the participants

The programme's approach, in which not only the museums, but also the participants themselves are stakeholders, was implemented particularly through GML&D's dual focus on providing participants with environmental sustainability skills and assistance in the establishment of museum-specific environmental policies, as well as leadership skills to help them put these policies into action. It is clearly visible in the introduction to the GML&D Welcome Pack handed out to participants. Here, it is claimed that:

"We place emphasis not only on the development of skills and knowledge, but also on how these can be used to bring about positive change in your own organisation. If the knowledge only stays with you, we will not have achieved our mission. We are passionate about enhancing your practical skills, your knowledge and your personal and professional growth and development."

Enhancing internal and external communication skills

As part of the leadership skills training, during a workshop that BOP attended – on how to get colleagues on board to assist in the successful implementation of environmental projects – participants were presented with and discussed the value of different communication techniques for framing environmentalism, and their likely effects on staff motivation. The success of adding this focus to the taught knowledge on environmental issues was clearly represented by conservator

Pierrette Squires, who took part in the programme as representative for Bolton Museum:

"Including the savings due to not installing air conditioning in Archives (I don't know that I'd have had the confidence to push for this without being on this course), Bolton Museum has saved approximately £50,000 capital plus, at a guess, at least £10,000 annual energy savings on running costs for air conditioning. My understanding has improved particularly in procurement and carbon footprinting. I am much more confident to argue for change. This has hugely benefited my professional development, persuading me to take a risk and push the accepted standards in the argument against air conditioning."

However, communication skills not only looked at how to get colleagues on board, but also at how to communicate measures to visitors. To this end, the workshop also looked at how museums could communicate their ideas to the public in a creative way (especially where visitors might feel that measures reduce visitor enjoyment) – as an example, the Wordsworth Trust has taken extracts from Wordsworth's work (which has a strong connection to the natural environment) and linked them to messages such as 'switch off the light'.

Steps towards attaining museums' environmental sustainability

For museums, the main value – and motivation for SMT to let staff participate in the programme – appears to have been development towards environmental sustainability (in line with legislative changes). However, Kaye and Rachel conceded that economic considerations also played a large role, with museums realising that investments now made might well lead to reducing running costs (i.e. electricity and water bills) in the future.

According to Edward Kellow (who led the workshops together with Rachel), the individual Carbon Footprint Charts, Carbon Assessment results and Costs charts produced with the help of the Greener Museums toolkit highlighted museums' key questions and problems, thus forcing them to think about how to address these and implement changes. Interestingly, it appears that during this process, several participants discovered valuable existing skills amongst their colleagues, which had never been put to use before, and have now set up 'Green Teams' within their organisations. At the time of BOP's initial meeting with the project manager in September 2010, Kaye and Rachel expressed themselves amazed at the changes that some museums had already been able to make. One of the participants, The Beacon Museum, for example, took on a project in which they reduced lighting costs by 18% within 3 months. Museum manager Sue Palmer, who represented The Beacon Museum on the Green Museums programme, said:

"I learned useful current information that even the Council Sustainability Officer doesn't know! I now have a good working relationship with the Properties Section because I understand what they are trying to do - they also know that they don't have to talk down to me. I can't imagine how hard it would be to try to tackle these issues without the Greener Museums support."

Development of a museum network

In addition to meeting and exchanging ideas during the workshops, which the participants clearly appeared to value very much, the creation of a sustainable network of 'green museums' also seems to have taken off successfully. Whilst networking and information sharing appears to have been relatively sporadic prior to the programme (Rachel mentioned that with sustainability actions still being in their infancy, information sharing has often been neglected and poorly executed), participants on the GML&D programme have already started privately networking with each other. For example, two participants mentioned that they had visited each other outside of the Greener Museums workshops to see and discuss each other's projects. The idea of sharing and exchanging ideas – as well as empowering and enthusing colleagues – seems to have made such an impression that one participant from Liverpool Museums has come up with a space on their website in which staff can log new 'environmental' ideas – these are then gathered, monitored and processed by the communications team.

Enhanced reputation with the local community and funding bodies

Although both Kaye and Rachel agreed that museums do not always realise what they have achieved and should learn to make more of the strides they have made in becoming more environmentally sustainable, a further important value that may be gained by participating museums is an enhanced reputation. Museums can become *"more trusted places to learn the truth and spread the message"*, potentially leading to increased prominence within the local community. Crucially, furthermore, the increase in reputation gained by 'becoming greener' might also have a positive influence on a museum's chances of receiving funding, as potential funders such as HLF and ERDF increasingly consider sustainability as very important. This was again witnessed by The Beacon Museum, which was awarded £65,000 in funding in 2010 for sustainability improvements.

Adaption as well as mitigation

Kaye, in her capacity as Collections Care Liaison Officer for Renaissance North West, also highlighted the link between environmental sustainability and care for museums' collections. For example, one of the participating museums assessed not only themselves but their entire geographic environment with the aim of both

reducing their impact on, and adapting to, the changing environment around them in order to better protect their collection (i.e. from floods). However, Kaye conceded that this link was less visible to the participating museums and that this was not the first priority for most in their efforts to become more environmentally sustainable.

Challenges, success factors and legacy

Challenges

In terms of the GML&D strand, Rachel and Kaye felt that the main challenges faced by museums and participants – and consequently by the programme organisers in their efforts to develop a successful programme – were:

- The organisational culture within museums: although smaller independent museums are often more flexible, these often lack the staff or finances to make changes, which are available to larger museums
- Some participants had difficulties in persuading their SMT to let them participate in the programme due to time commitments.
- Internal communication: a prevailing perception amongst participants that colleagues would not be interested in supporting environmental sustainability measures, coupled with a lack of staff engagement measures, which appear to be *“often talked about, but not always done right”*
- External communication: a need for museums to learn how to successfully communicate their vision
- An overall challenge of how to make everyone feel that sustainability concerns them and is their responsibility.

The programme's success factors

Despite the above challenges faced by Renaissance North West and Greener Museums, the programme was successfully developed and executed by consistently addressing these challenges. The main success factors then were:

- Offering a flexible programme which made it easier for participants to take the time to (and persuade their SMT to let them) take part: i.e. the inclusion of online workshops and telephone consultations,
- Linking environmental skills with leadership and communication skills to aid participants to carry out and pass on acquired knowledge. This importantly includes the ability to win buy-in from SMT and colleagues, as well as visitors.
- Developing leadership skills at all levels within a museum: the participants were all in 'high' enough positions to have a link to SMT, as well as 'low'

enough to advocate changes to the rest of the museum's staff without being considered top-down or patronising,

- Catering to the abilities of the very different museums participating in the programme, going by the idea that *"every little helps"*. GML&D participants discussed measures ranging from getting staff to walk instead of using taxis, and placing 'hippos' in toilet cisterns, to major capital investments to replace all lighting in a museum. This is also mirrored in the upgrade initiatives presented in the Survival Strategy.
- Although Rachel agreed that the holistic approach taken by the Green Museums programme might *"lead to overkill in some case"*, both Rachel and Kaye stressed that it offers a more sustainable alternative to other, more prescriptive approaches which 'might act as a good initial basis but would lead to museums considering their work done once they have achieved the required results'.

Legacy: Information-sharing through organisers and participants

- Following on the delivery of the programme, Kaye has started the process of sharing information with other project managers – both across the region, through Hub meetings with other project managers, as well as on a national level. As witnessed also in the approach of basing the Green Museum tools (Survival Strategy) on the previously established East Midlands Step-by-Step guide (i.e. taking a cross-hub approach), the programme is clearly one that Kaye and Rachel see as transferable to other regions across England. To this end, the Survival Strategy is now available to all, and Kaye additionally mentioned that she has contacted other project managers to *"see what they are doing"* and recently attended a sustainability conference in the East of England.
- Similarly, again referring back to GML&D's approach of *"developing a cadre of environmental professionals"*, the idea is that should museum staff move on to a new post in a different museum, they will be able to take the gained knowledge with them, so that not only the museum they were working for during the programme, but also any new museum, will profit from the skills they acquired during the Green Museums programme. One of the participants, for example, had recently been laid off from his post but mentioned that he was continuing to participate in the programme for his own benefit, and hoped to put the acquired skills to use in a new post in the future.
- In addition to this comes the expectation that the participating museums, due to their strong community ties, are in a position to promote sustainability and educate the local public. For example, Kaye and Rachel mentioned that in some cases, museum staff had been motivated – and able to – advocate their

ideas outside the museums, becoming “*regional green champions*” within their communities.

The programme's transferability

With regard to transferring the acquired learning, the Green Museums programme's adaptability and wide range clearly supports its transferability. Rachel stressed that even if (some of) the participating museums were already at a relatively advanced level of environmental sustainability compared with other museums, they, too, had gone through a development to reach the level they are at now (“they know how to read the meter”). This goes hand in hand with Kaye's and Rachel's statement that museums should not copy case studies, but learn from them and adapt them to their own circumstances.

Interestingly, Rachel pointed out that the programme could not only be transferred to another Hub in its present form, but could also be scaled up or down to fit different sized groups of participants, as well as be repeated both in a funded or, potentially, in a commercial format, with for example, museums themselves paying for the delivery of the programme.

SROI analysis

Stakeholders

The main stakeholders in this programme are the participating museums as well as the individual employees sent to represent the museums during the programme.

Inputs

- £225,000 Renaissance funding in FY2010, equalling 100% of the project expenditure
- Estimated 30% of Kaye Tetlow's time supporting the project: equivalent to £8,100 in salary costs.
- Estimated 5% of Renaissance NW hub manager's time supporting project: equivalent to £2,775.25
- £114,150 for contracts with delivery partners Arup (Survival Strategy) and Greener Museums Ltd (GML&D) as well as fees for delegates on GML&D programme and printing of publications
- £96,700 for contracts and equipment for pilot projects and BESI

Outputs

Two principal outputs:

- Workshop structure and learning documents

- Survival Strategy document
- Established 'green museums NW' network

Outcomes

- Staff skills/ knowledge training and empowerment (=professional development)
- Museums' enhanced internal and external communication skills
- Green Strategies developed and implemented in museums across NW with resulting reduced carbon footprint and costs (=organisational development)
- The participating museums' increased reputation with local community and funding bodies
- Adaption and mitigation

Impact Map pt 1: stakeholders to outcomes

Project Green Museums, Renaissance North			
Stakeholders	Inputs	Outputs	Outcomes
Participating museums in North West Hub	£225,000 Renaissance funding p.a.	Workshop structure and learning documents	Staff's professional development
	30% of project manager's + 5% of Hub manager 's time supporting project		Museums' enhanced communication skills
	£114,150 for delivery partners, fees for GML&D delegates and printing of publications	Survival Strategy	Museums' reduced carbon footprint and cost
	£96,700 for contracts/ equipment for pilot projects & BES1	'green museums NW' network	Museum's increased reputation and chances to attract funding
			Adaption and mitigation

Additionality

There are a number of aspects to the Green Museums project, which the participating museums would not have been able to profit from without Renaissance funding/ participation in a Renaissance-led project:

In-depth, step-by-step support from professionals leading to a structured approach to environmental development

A combination of environmental and leadership skills for participants which the programme organisers recognised the need of and successfully addressed

The development of a sustainable museum network – the project provided both the incentive (motivation) and possibility for museums to communicate with each other

Research sources

- Financial and project information from MS
- Interviews with:
 - Kaye Tetlow, Project Manager and Collections Care Liaison Officer, Renaissance North West
 - Rachel Madan, Director, Greener Museums
 - Edward Kellow, Head of Learning and Leadership, Lead International
 - Project participants from various museums in NW

5 Green Museums, East Midlands

Introduction and project aims

The current Green Museums project in the East Midlands builds on work that was carried out in the previous Renaissance business planning period 2008/09. At the time, research was carried out with museums across the East Midlands to establish a baseline of their engagement with environmental sustainability issues. In the second phase, a step-by-step guide to address these issues was developed and one-to-one support given to six museums to help them become a 'greener' museum.

The project is now in its third phase (business planning period 2009/11) and a further 11 museums were recruited onto the programme. The main aim of the project is to help museums becoming more environmentally sustainable. The project's objectives are to:

- Assist 11 flagship museum sites to implement sustainable actions including assistance through site visits, audits, monitoring tools and specialist advice
- Continue the work with the 6 museums from the previous phase and to offer further help where required, as well as to use these museums as exemplar case studies to act as an inspiration for the region's museums

The project is delivered by Groundwork Derby & Derbyshire, alongside T4 Sustainability.

The evaluation primarily focuses on Phase 3 activities with the 11 newly recruited projects. The initial six museums were excluded due to most of their project engagement having taken place in the previous business planning period. Two Hub Museums (Newarke Houses and Snibston Discovery Museum) are taking part alongside eight non-Hub museums and one National Trust property.¹ This is a slightly lower ratio of Hub museums compared to other Renaissance-funded projects.

Project activities

The project activities primarily focus on one-to-one support provided by Groundwork to the individual museums. At the beginning, a half half-day audit visit

¹ The eight non-Hub museums are: 78 Dergate Northampton Trust, Alford & District Civic Trust Ltd, Moira Furnace Museum Trust Ltd, Newark (Notts & Lincs) Air Museum, Rushden Historical Transport Society Museum, Rutland County Museum, The Egalitarian Trust/Galleries of Justice Museum, Woodhall Spa Cottage Museum; and the National Trust Property is: National Trust Sudbury Hall Museum & Museum of Childhood

is carried out, following which recommendations for implementation are made to each museum. These recommendations typically evolve around the issues of lighting, environmental control (e.g. air conditioning/heating of south/north-facing rooms), building maintenance or recycling for visitors/museum staff. Given the large diversity of sites (inc. a pumping station, railway station, modern buildings), specific recommendations are being made depending on the physical structure of the sites.

Each museum then works with Groundwork to develop an action plan and starts working on an environmental monitoring process to collect data on the museums' emissions and carbon footprint year-round.

The action plans also consider the feasibility of implementing the recommendations, including cost implications and payback periods. For example, one of the Phase 2 participants, Church Farm Museum in Skegness, is looking to get PV solar panels installed and the action/feasibility plan is exploring how to sell electricity back into the main providers' networks etc. These plans have added importance as Church Farm Museum is looking to move from its current LA-status towards a community-run/trust status and the sales of solar energy may feed into the business model.

Furthermore, Groundwork helps museums to achieve the Green Energy Certificate (a DEC process calculating the energy efficiency of a building) which is mandatory for buildings over 1000sqm and needs regular renewal. And for other specific issues or enquiries and additional support, a weekly helpline was recently set up for museums.

Cultural change within the organisations is also an objective of the project. Quarterly network sessions, that bring museums together to feedback on progress, share good practice and stimulate a sense of competitiveness, are taking place to achieve this. Initially these meetings were thought to happen on a cross-regional basis, but due to practical (long travel) and conceptual considerations (very different concerns for museums in say, Skegness and Derby) it was decided to set up three smaller networks: Nottinghamshire and Derbyshire, Leicestershire and Northamptonshire, and Lincolnshire and Rutland. These networks both include Phase 2 and Phase 3 projects.

Stakeholders and value

The main beneficiaries of the project are the participating museums; however, in some cases museums are planning to communicate learning from their project to visitors who may thus emerge as a long-term beneficiary group.

Participating museums

Cost savings

Although a benefit that will only occur in the long-term, the prospects of cost savings are one of the main drivers for museums to engage with environmental sustainability issues in general, and to participate in the Green Museums project, in particular. The two museums that we spoke to as part of the case study research as well as the Renaissance project manager, Katherine Wilson, all confirmed that they saw cutting down on energy bills and saving money over time as museums' primary benefit from the project. As Peter Orgill, General Manager at Snibston Discovery Museums, explained:

“Cutting costs is one of the big operational issues at the moment. There was a real desire from our side to reduce energy bills but at the same time we also need to meet the financial targets set from the County Council.”

Having said this, the Green Museums project does not offer any funding for actual implementation or delivery of energy saving measures (such as funds for new insulation, solar energy solutions, etc.). Although, advice on funding sources has been offered to participants throughout the programme, the museums are now left with the challenge of raising this up-front investment and according to Naomi Simmonds, Business Support Officer at Groundwork Derby and Derbyshire, this is the main reasons for organisations not pursuing the recommendations made as part of the project – even more so in the current climate of economic recession and public spending cuts. Nevertheless, once museums have started on the journey, they quickly become aware of the cost benefits.

An important focus of the Groundwork support has been to identify 'quick wins' for each museum, i.e. energy saving measures that require a low financial and technological investment. As Lorraine Cornwell, Collections Manager at Rutland County Museum, explains the Green Museums project has been

“a real eye opener, in particular with regards to in how many different ways you can become more environmentally sustainable – they often don't cost the earth or are quite simple things like reducing the amount of heat loss. We just hadn't thought about simple things like that before.”

Prioritising actions

In addition to the overarching aim of cost savings, there are a number of immediate benefits for the museums. For example, the audit has helped some museums to focus on the key issues and to identify the most important problems that needed addressing (e.g. heat loss through roof rather than energy-inefficient light bulbs). As Naomi points out, there are only a limited number of 'quick wins',

while solutions to most issues involve a much higher cost or require a museum-specific, tailored approach. The Green Museums process and one-to-one support has helped a number of museums to prioritise their actions. Peter confirms that writing the application for the Green Museums programme has helped them to focus on the museums core strengths and challenges, and working alongside Groundwork has helped them to make a commitment to those activities that they would implement. Similarly, Lorraine considered the session working with Groundwork to come up with a list of priorities as one of the most useful ones of the programme.

Organisational change

Only few museums see sustainability as a holistic concept and as important to their entire operations. On the contrary, according to Katherine, many of them consider it to be just a single-issue (e.g. a leak in the roof). This was the case for the Rutland County Museum at the beginning of their involvement. As a museum, they had not invested a lot of thought into becoming more environmentally sustainable. While some work had been done at their parent-local authority, this had not impacted the work of the museum. The reason for getting involved in the Green Museums project was hence mainly related to a major required change in the museum's heating equipment: all of the boilers in the museum date back to the 1970s and needed urgent replacement, including some having failed already. Given the required change of the equipment, and the emergence of the Green Museums project at the same time, *"it was obvious then, that we had to think about green issues when considering our replacement options."*

The extent to which museums as a whole are engaged with environmental sustainability very much depends on the museum leadership or key staff being personally interested and committed. One of the outcomes of the Green Museums project has been that it has helped raise environmental sustainability on the agenda of participating museums. While having had a personal interest in green issues much prior to the project, one of the main benefits that Peter perceives is that it has given him the opportunity to dedicate some focused time to such issues, *"to focus on the green agenda with a good reason, during working hours."* As a result he has been able to lead on and implement a number of environmental measures at Snibston Discovery Museum. In particular, he much improved the recycling facilities at the museum (*"we were starting off from a very minimal level"*). He feels that it has changed the attitudes of other colleagues and has raised recycling on the agenda in the museum. Recycling has also been one of the measures implemented in Rutland County Museum and Lorraine feels that the organisation's involvement in the Green Museums project has helped raise the awareness among staff for green issues.

Katherine believes that approaching the environmental sustainability issue from an 'organisational change' perspective is very useful, as she perceives long-standing preconceptions and unwillingness to change, particular in the area of collections care, as a key barrier to implementing green measures (e.g. switching of the environmental control system). While at Rutland County Museum such staff resistance was no concern, this was more relevant in the case of Snibston Discovery Museum. However, in getting buy-in and commitment by all museum departments, including curatorial staff, Peter feels that it was a real advantage being part of a museum-led initiative like Green Museums (as opposed to County Council proposals which are perceived to be further removed).

Peer learning and support

Another immediate benefit of the project has been the cross-museum learning and support given through the (sub-)regional networking meetings. There are clear differences as to the learning potential from these meetings given the different starting points of the participating organisations. Museums with little prior engagement with environmental agendas, like Rutland County Museum, found it extremely helpful to talk to other museums at these sessions. There was a very practical learning outcome in that, quite often, Lorraine felt that she was facing similar problems to other museums and she was able to almost literally take on ideas or solutions that her peers had found. She also appreciated hearing a *"set of different ideas, other than Groundwork's (very valuable) opinions."* On the contrary, for more experienced museums, there was potentially less value in these peer sessions, as shows the case of Snibston Discovery Museum. The organisation had implemented a couple of projects (e.g. oxidisation of electricity system) already and during the course of the sessions they passed on information about these to other museums. While Peter readily shared his experiences with other museums, he felt there was relatively little that he could learn from others.

One of the things he did gain from the sessions, however, was a sense of support and confirmation. While the museum had already embarked on the journey to becoming more environmentally sustainable prior to the project, meeting other museums that are engaging with these issues, renewed his commitment and provided him with encouragement to take the agenda further. Similarly, the conversations with Groundwork were of value to him as they *"confirmed the things that [he] as an amateur enthusiast knew already"*.

Both participants made new contacts through the peer sessions. Though it is too early to say what the value of these contacts will be over time, the museums are positive that the network will continue to exist beyond the project duration (and the direct support from Groundwork), thus constituting at least a potential future resource to draw on.

Leverage in strategic negotiations

Finally, some participating museums consider their engagement in the Green Museums project to have had outcomes of strategic nature. Both Rutland County Museum and Snibston Discovery Museum report that the project has benefitted their relationships with their parent-local authorities. Both museums are reliant on the central property services departments for any capital investments or changes to their museum facilities. The knowledge that they gained through the Green Museums project has enabled them to make more targeted suggestions for improvement, underpinned by evidence.

In particular, the monitoring of energy usage and the accompanying environmental tracking spreadsheet introduced by Groundwork has been a useful tool in the discussions with property managers. As Peter explains, the County Council had commissioned a number of reports already that suggested options for more sustainable technologies and ways to save energy in the museum – and had taken some decisions without much involvement from the museum (e.g. with regards to the use of a technology aiming to reduce gas usage). The monitoring data emerging from the tracker spreadsheet as well as advice from Groundwork have enabled the museum to make a case to the local authority property services that challenges the usefulness of this particular technology while being able to put forward alternative options.

Going forward, both museums will face the challenge of having to convince their parent institutions to invest in further technology to make the museums more environmentally sustainable. As Peter argues, their involvement with the Green Museums project has given them

“a bit of leverage in these discussions and expert arguments. It has also helped to raise the profile of the museum in the eyes of the relevant County Council department.”

Public image

According to Katherine Wilson, a few programme participants were partly driven by a marketing agenda, i.e. *“wanting to be seen to go green.”* Accordingly, some museums (including the Galleries of Justice and Snibston Discovery Museum) have plans to publicise their green engagement to visitors, e.g. through an exhibition. However, this will not happen until the environmental measures have been implemented and this is therefore a long-term plan. In several cases, museums have however started encouraging visitors to recycle onsite and are communicating with visitors about the steps they are taking to increase their sustainability.

While Lorraine clearly states that visitor perceptions were not a driver for Rutland County Museum to become involved in the programme, the opposite is the case for Snibston Discovery Museum. Peter explains that the museum was very aware of external perceptions of audiences. He feels that, in the whole scheme of how the County Council contributes to environmental improvements in the community, a big body such as the museum needs to take a lead in this. There are therefore plans to develop an education project around the museum's efforts to become more sustainable, while also making it part of the visitor experience long-term through creating a composting facility on the museum site which would be accompanied by interpretation.

Challenges, successes and legacy

The Green Museums programme builds on an approach tested successfully in its Phase 2. This approach combines two elements:

- targeted, one-to-one support for individual museums sites, and
- exploring more general issues (monitoring, best practice solutions in particular areas such as environmental control) on a cross-museum platform, that also allows for knowledge sharing and peer support

The approach works well for the majority of the museums, even if some of the more advanced organisations would have potentially benefitted from collaboration with comparable museums in other regions. During the lifespan of the project, a number of museums faced practical challenges with regards to data collection, e.g. obtaining electricity bills from their parent institution. However, the biggest challenge emerges after the end of the Green Museums engagement: to raise the funds required to implement the recommendations made. As in the example of Rutland County Museum, this is complicated by the ongoing or planned restructuring of funding bodies: Rutland County Council as well as the museum are currently under review, which includes a re-organisation of the council's property services. This has led to essential decisions on the replacement of the museum's heating system being stalled for the time of the review period.

It is currently unclear whether the Green Museums programme will be continued in any form after the end of the current funding period.

SROI analysis

Stakeholders

As mentioned above, the main stakeholders of the project are the participating museums. It was agreed that the SROI evaluation focuses on Phase 3 activities with the 11 newly recruited projects as most project engagement of the initial six museums has taken place in the previous business planning period.

Inputs

- Over the course of the two year project duration, Renaissance invested £80,000 into the project [need to split out work with 6 initial museums]. The project was 100% Renaissance funded.
- The full budget is allocated to delivery by consultants Groundwork Derby & Derbyshire.
- The Renaissance Hub manager spent approximately 33% and the project manager 8% of their time in-kind on the project – equivalent a financial contribution of £1,470 and £5,650 respectively per year

Outputs

- 2 Hub museums, 8 non-hub museums and 1 National Trust property participated in the project elements included in the evaluation. 3 of these museums are local authority museums and 7 independent museums
- a further 6 museums participated in the wider Renaissance in the Region project
- 11 organisations have participated in development activities
- 2 museums are planning education and participation initiatives related to their project engagement

Outcomes

In addition to the learning outcomes described above, we further interrogated museum participants' skills development through a survey of case study projects. This survey looked at the following areas:

- Ability to source and utilise new information networks and sources
- Knowledge and skills in relation to environmental technologies, legislation, monitoring or public engagement
- Confidence in driving forward organisation's environmental sustainability agenda
- Peer learning and support
- Ability to raise awareness and influence colleagues, parent organisations or funders

The aggregate findings from this survey are presented in the main report.

Impact Map pt 1: stakeholders to outcomes

Project Green Museums, East Midlands			
Stakeholders	Inputs	Outputs	Outcomes
Participating museums	1) Total income: £80,000 over 2 years [check]	▪ 11 museums participating in project ▪ 11 museums participating in development activities as part of the project	▪ Skills development ▪ Cost savings made through reduced energy usage
	2) Total cash expenditure: £80,000 over 2 years on consultancy fees for project delivery [check]		
	3) Total in-kind expenditure: £7,120 over 2 years [check]		

Monetisation

While some museums have reported baseline figures for water, electricity and gas/oil usage, it was not possible to collect the second set of data within the research period. It is therefore not possible to report on any potential cost savings that museums have made as a result of the project.

Research sources

Financial and project information from Katherine Wilson (Strategic Projects Manager, Renaissance East Midlands)

Interviews conducted with:

- Meeting with Katherine Wilson
- Naomi Simmonds (Business Support Officer, Groundwork Derby and Derbyshire)
- Peter Orgill, General Manager, Snibston Discovery Museum
- Lorraine Cornwell, Collections Manager, Rutland County

6 Green Accreditation, Yorkshire

Introduction and project aims

Yorkshire Sustainable Museums Project is being co-managed by Renaissance Yorkshire and CO2 Sense,¹ with project delivery contracted to Groundwork.² The first aim of the project is to demonstrate the opportunities and performance improvements that they can be made in becoming more environmentally sustainable. The second aim is to do this by investigating the relative merits and costs of four different approaches to achieving this goal. As such, Yorkshire Sustainable Museums Project is as much a research and demonstration project, in which the findings will be rolled out to the wider museums sector, as it is a straightforward delivery project.

Yorkshire Sustainable Museums Project builds on the delivery partner's work in the East Midlands to develop the Green Museums step-by-step guide in 2007-8, as the Green Museums step-by-step guide is one of the four approaches being examined, along with:

- use of the Green Tourism Business Scheme (GTBS)
- self assessment and action planning using Green Start (a light touch VisitEngland version of the GTBS, for smaller/less advanced organisations, who can then progress to GTBS)
- direct consultancy support from the Groundwork delivery team

One of the key aims of the research element of the project is to understand what the benefits are of approaches that include bespoke consultancy support (Green museums and the direct Groundwork support), in comparison to approaches rooted in self assessment (GTBS and Green Start). Lastly, as an added incentive to the project participants, a portion of the project funds were retained to fund implementation initiatives identified through the auditing and action planning stages of the project.

The project encompasses a cohort of 12 museums: three Hub museums and nine non-Hub museums. These provide a good breadth of both size and governance types (independent, local authority and national), though all have Museum Accreditation. This mix is represented in each sub-group in order to better assess

¹ CO2 Sense is a regional organisation that helps businesses and organisations in Yorkshire and Humber to prosper and grow in the new, low carbon economy.

² Groundwork is a group of local charities whose work is primarily concerned with local communities and the environment.

if these are important contextual variables in determining what particular type of approach might be most beneficial for different types of museums.

Project activities

The project began in summer 2010, and the first task was to select the museums to be involved. Renaissance Yorkshire managed the recruitment process to choose the 12 museums, each of which submitted a project application plan, stating why they wanted to be involved in the project and answering a short checklist of activities that establishes how advanced each museum was in terms of their existing environmental practices. The successful museums were then allocated to one of the four strands.

Museum assessment and action planning

The core project activities for the museums have been to conduct audits/reviews of their existing sites and practices and develop Action Plans for how to improve their environmental performance. However, there are differences in exactly how this is done across the four different approaches being trialled.

1. *Museums receiving intensive support from Groundwork*

- Leeds Industrial Museum at Thwaite Mills Watermill
- Sandtoft Trolley Bus Museum
- Doncaster Museum and Art Gallery

The main difference between this and the other approaches is that Groundwork has developed and agreed the action plans in partnership with the museums. The theory is that this should produce more in-depth and tailored plans than the self-assessment or 'off the shelf' tools can. Groundwork's support encompasses some resources developed by CO2 Sense on a programme of making the hospitality industry in Yorkshire become more environmentally sustainable. This includes a 'dashboard' style assessment report, which focuses on benchmarks across all categories of environmental impact, using a traffic light system to show which areas are high cost/ high risk/ high opportunity/ high impact at a glance. The action plans contain details on improvement recommendations.

2. *Self assessment and action planning using the Green Museums Step-by-Step Guide*

- Beck Isle Museum of Rural Life
- York Castle Museum
- World of James Herriot

The museums have undertaken a baseline assessment and site audit. The main difference from the other approaches is that there is a peer learning element, as the action planning will take place in a group workshop (this is scheduled for January). The idea of incorporating group working is that it stimulates networking and the sharing of ideas – which, in turn, should lead to innovation and increased confidence to implement measures. This is based on findings from workshops that have been held as part of the Envirowise Resource Efficiency project (a free Business Link-promoted programme that provides advice on environmental issues to business). The resources developed by Groundwork Derby and Derbyshire, who developed the guide for Renaissance East Midlands, are being used again in this strand.

3. *Self assessment and action planning using Green Start:*

- Fairfax House
- Leeds Industrial Museum at Armley Mills
- Bronte Parsonage

Groundwork have remotely supported the museums (via email and phone) to complete the Green Start monitoring and measurement tool and then have reviewed it once complete. As this tool is designed to be a 'cutdown' tool, the expectation is that members will go on to join an accredited scheme within two years of completing their Green Start process (e.g. GTBS).

4. *Museums on the GTBS pathway:*

- National Coal Mining Museum for England
- Rotunda, the William Smith Museum of Geology
- Shandy Hall

Similarly to the Green Start tool, Groundwork's role in the project is to support museums remotely to complete the GTBS monitoring and measurement tool, complete the GTBS self assessment and review the resulting action plans. This is the only one of the four approaches that can result in an accredited award as a result of their work, and this is done by an external GTBS advisor, who assesses performance and makes recommendations for improvement prior to grading.

As GTBS also requires museums to have quality assurance such as Visit Britain in place already, this limits the applicability of this scheme. It is also a paid scheme, with a joining fee and annual fee (which is dependent on size and activity). The costs of joining have been included within the Yorkshire Sustainable Museums Project budget. Some of the museums (e.g. Shandy Hall) have already been

visited by the external GTBS, and will not achieve accreditation to GTBS during the timescale of the project.

Recommended actions

The twelve Action Plans that have been developed for the museums encompass a wide range of suggested areas for improvement. This includes dealing with hazardous substances and other reducing pollutants, local and eco procurement, to actions to influence staff and visitor behaviour. However, the bulk of the actions are concerned with four categories:

- Energy use – from monitoring energy consumption for those museums not already doing so, through suggestions on low cost, low tech implementation solutions (reducing draughts, improving insulation, changing energy tariffs, replacing lights with low energy options), to higher cost and higher tech implementation options (e.g. exploring the possibility for on-site renewables).
- Management – actions focused on the development of internal environmental policies and structures (e.g. forming a 'Green Team' or designating a 'champion'), ensuring compliance with environmental regulation, or undertaking a strategic risk assessment of the long term impacts of how climate change and resource depletion may affect the museum's business.
- Water – similar to energy, the suggested actions range from beginning to monitor water use, through to reducing water use (primarily through toilets and bathrooms, e.g. 'hippos' in cisterns, installing timers, using percussion/self closing taps), and installing water butts to collect rain water.
- Waste – the most common actions relate to improving recycling for staff and visitors, though actions to reduce paper use (particularly in marketing and promotion), and work with suppliers to make more efficient use of packaging are also suggested for several museums.

There is no indication that the different approaches lead to different recommended actions. Therefore any important differences between the four approaches tested will presumably lie in how effective they are and how efficient.

Support to implement improvements

The baseline assessment and action planning was mainly completed at the end of November, though the group action planning for the Green Museums cohort will carry through into the New Year. The next stage of the project is the implementation support phase, and Groundwork begins this as soon as the individual museums are ready to begin their improvements.

The aim of this support is to build on the action planning and baseline assessment work to give staff the confidence to implement the actions they have identified, and to provide specialist skills and support where necessary to do this. It is felt that this confidence is critical to encouraging future commitment and activity. The Groundwork and CO2 Sense team will provide both technical and financial/grant funding advice, covering energy efficiency, waste management, behaviour change, stakeholder engagement and procurement.

The differences across the strands again centre upon the degree of one to one support. Groups 1 and 2 will receive tailored implementation support, whereas those museums working through the self assessment tools receive a small degree of telephone support.

All 12 museums will then have the opportunity to bid into an improvement fund administered by Renaissance Yorkshire with support from CO2Sense, This fund was originally £7,000 but has been boosted by CO2 Sense being able to lever an additional £14,000 from Yorkshire Forward, making an overall fund of £21,000. This fund can be used for capital investments or for additional consultancy support for issues such as behaviour change.

Impact monitoring and project evaluation

The important evaluation across the project, looking at the costs and benefits of how the four approaches have worked for the twelve museums, will take place in late February and March. Groundwork will visit all twelve of the sites and discuss with staff their views on the methodologies used and the key successes and challenges they have identified, using evaluation material developed through their previous projects (e.g. in the hospitality sector).

Stakeholders and value

The main beneficiaries of the project are the participating museums, though a few, such as York Castle Museum and The World of James Herriot, are also looking to the project for support and ideas to help educate visitors, and (ultimately) change their behaviour to be less carbon and waste intensive.

Participating museums

Cost savings

As with most of the other environmental projects within the evaluation, the most frequently mentioned value that the projects anticipate deriving from their participation in Yorkshire Sustainable Museums Project is to reduce the amount of money they spend on utilities, principally energy but also water. The following are examples of specific cost savings that some participants are hoping to see from the project:

- Doncaster Museum and Art Gallery's budget allocation for fuel and electricity does not always cover the cost of its energy use, *"this money is taken away from other museum activities in order to balance the budget."* In particular, they suspect that the air handling system within their 1960s building is fuel inefficient.

There is also downward pressure on Doncaster Museum and Art Gallery to make cost savings on its utilities bill as the Council Culture & Leisure department has a current target to reduce utilities costs by 10% across the board.

However, this cost pressure is not just a feature of local authority-run museums, but also applies to independents,

- Bronte Parsonage are participating in the project as they feel that looking at *"resource efficiency in a systematic way"* has been a key missing element of the work that they have already put in to-date to make themselves more financially sustainable in the long term.
- The Rotunda in Scarborough, while part of an independent Museums Trust, still has to contribute to the local Council's sustainability targets as part of their funding agreement.
- Shandy Hall report that, as a small charitable trust, they are always on a constant drive for efficiency savings and expenditure on utilities is one of their largest expenditure items. The difficulty before participating in the project has been how to realise any savings given the particularities of their site (see section 0 below on Challenges and Successes).

Securing a sustainable future for historic/specialist buildings and collections

In a number of cases, the museums see a key value in participating in the project to be access to dedicated expertise that will allow them to give the historic sites and buildings that they are custodians of a sustainable future. That is, it is not a knowledge of how to become more environmentally sustainable *per se* that they have been lacking, but the added knowledge of how to apply it to listed buildings and take account of other site-specific heritage factors.

The National Coal Mining Museum sum up many of the museums concerns: *"As a historic site with older buildings, it is not always obvious how energy-saving methods and devices can be adapted to our needs without compromising the site's historic integrity"*. Shandy Hall's problems relate not just to being a Grade 1 listed building, but also to its wider environment, as the village in which it is based, Coxwold, has no gas supply, and the property is not connected to mains-drained sewage works. Further, as Coxwold is located within a National Park, Shandy Hall

also has to be mindful of additional restrictions that curb the opportunity for action, such as a National Park stipulation that bans on-site wind generation.

Doncaster Museum and Art Gallery's concerns relate more to the specialist function of their building – i.e. looking after a collection for which there are stipulated environmental standards regarding light, temperature, relative humidity, and (occasionally) vibration. So, although they had previously had a Carbon Trust report on the building, they felt that there were more elements to address, particularly regarding the alternatives to the current inefficient air handling system, but were unsure that the Carbon Trust had the museum expertise to understand these specialist issues and solutions.

Better alignment of museum activities with overall mission

A number of the museums report that a key value that they will derive from the project is to further align how their museums operate with their founding mission or vision.

In some of the sustainability literature, there is a normative assertion that this will always be the case: museums are the custodians of collections for future generations, ergo they should also be looking after the planet for future generations (and proselytising about how to do this). In reality, museums' relationship to the environment is more equivocal than this suggests, both at a fundamental level,¹ and at the more obvious level of the practices of individual organisations.

The World of James Herriot, as a relatively new museum (established as recently as 1999), has put measures in place to reduce their carbon footprint and communicate to their visitors about the impact of climate change since their opening. They see their participation in the Yorkshire Sustainable Museums Project as the next stage in their journey to “*set the benchmark for becoming an eco friendly attraction.*” Similarly, the Bronte Parsonage Museum believe that there is a link between “*the Brontes, landscape and ecology*” – meaning that the Museum should be striving to embody these values in its own operations, by reducing its environmental impact.

¹ *At a fundamental level, museum conservation is essentially working against the laws of thermodynamics, in that all systems and structures in the universe are becoming increasingly disordered (i.e. entropy increases). Fighting this natural tendency to disorder, as in museum conservation, requires the input of energy.*

Embedding environmental sustainability within the organisation

The contribution that the project can make to organisational change is not a commonly expressed value by the museums in the Yorkshire Sustainable Museums Project. However, one of the reasons why The World of James Herriot is participating in the project is that it is in the process of reviewing its organisational structure. In this context, the museum is keen to be the instigator and owner of its own Sustainability policy and they see the Yorkshire Sustainable Museums Project as an important support mechanism in preparation for the coming transition.

In other cases, wider organisational change and developments has opened up the opportunity to pursue more holistic environmentally sustainable practices and solutions. For instance, York Castle Museum is embarking on a significant capital project for the first and second floors of its Debtors Prison, and this has provided the stimulus for them to think anew about how to improve all areas of sustainability. Similarly, the wearing of their 1970s-installed central heating system has provided an opportunity for them to explore greener solutions, not just for the heating system, but for all aspects of their building and site.

Development of skills and knowledge among staff

A clear outcome that most of the museums are hoping to gain from their participation is to increase their understanding and skills in being able to make their organisations more environmentally sustainable.

Non-participating Yorkshire museums

Three of the museums in the project (Thwaite and Armley Mills in Leeds and the Rotunda in Scarborough) aim to share their learning with other museums and, in the former of the two Leeds Industrial Museums, with any individual or organisation interested in environmental sustainability. Clearly this is a longer term value that may or may not arise from the project.

Wider sector

There is a dissemination phase of the project planned (see below), from which one of the outcomes will be the observations regarding which approach/tool is most efficient and approach for which museum context.

The environment

Many of the museums mention that the value of their participation in the project will be reducing the negative impact of their organisations on the environment. This is expressed as an intrinsic/ethical outcome, aside from any resulting cost savings.

Challenges, successes and legacy

The outcomes of the project are documented below in the SROI analysis. This section focuses on the process of the delivery of the project.

Different museums are at different stages of their projects at the time of writing. In addition, the four different approaches being trialled through the overall Yorkshire Sustainable Museums Project make generalisations about challenges and successes difficult. The following challenges and successes are therefore based on two examples from the two most 'opposite' approaches being trialled: the GTBS (the most 'off the shelf') and the bespoke Groundwork approach.

Green Tourism Business Scheme

As one of the three museums using the GTBS self assessment process, Shandy Hall report the following benefits of having gone through the process:

- Identified specific areas for improvement (*"made us aware of where we could do better"*)
- Encouraging/reinforcing of existing practice that they had already embarked upon – for instance, using eco brands for cleaning products
- Providing an impetus to taking difficult action(s) – they have known for some time that the 1960s insulation in the loft needed to be replaced with a more efficient alternative, but going through an improvement process gives them the spur and process in which to actually address it.

Although helpful, the above three actions could all be achieved by any of the four approaches being tested through the project. Shandy Hall thought those that are specific to an accredited self assessment tool are that it:

- Provides a framework with clear steps for where to go next – as the GTBS is a graded scheme, there is an explicit improvement pathway laid out for organisations.
- Improves their ability to apply for grants (e.g. to the Energy Saving Trust, or to CO2 Sense in the future).

The main challenges of the approach concerned the timing of the visit by the GTBS advisor, as the visit was scheduled relatively early in the timescale. This meant that most of the improvements that were identified through the assessment and action planning stage, such as the installation of a removable Quattro seal system to stop draughts for sash windows (English Heritage approved), or the free trial of 'warm coat' paint that they will take– up (brokered by CO2 Sense), had not been achieved by the time of the visit. Consequently, Shandy Hall were only awarded the 'Going Green' status within the GTBS scheme. However, they are

confident that by the next visit in 2012, if they are able to go ahead with most of the identified actions, that also include replacing the loft insulation (for which they are bidding for a Yorkshire Sustainable Museums Project implementation grant) and a jet system to be fitted to the Aga, they are confident of achieving at least Bronze status. Another challenge identified with the GTBS was the initial dauntingness of the framework (which has categories that are simply not relevant to museums, e.g. sections on showers and towels – reflecting the Scheme's hospitality roots). This was eased by being able to consult with Groundwork about how to work through the tool.

Bespoke Groundwork Support

Thwaite Mills was one of the museums chosen for the bespoke Groundwork approach. Thwaite is perhaps unusual among the Yorkshire Sustainable Museums Project museums in terms of how advanced they are in tackling environmental issues. The Mills already monitor their energy, water and waste consumption, work (as far as possible) with suppliers with green credentials, advise staff on green transport methods, and provide interpretation on environmental issues for visitors. The Mills have also begun initial work to investigate how to generate hydro power on the site via an Archimedes Screw.

Contrary to Shandy Hall, Thwaite Mills have found that participating in the project has been disappointing. This is because the level of support offered by Groundwork was not, actually, in the end, bespoke enough. The suggestions that Groundwork made during and after their site visit were all suggestions that Thwaite Mills have incorporated already, or are unable to do so according to a peculiarity of their site/governance arrangements etc. There was some frustration, then, that the bespoke support was in reality an 'a la carte' choice and that if a museum wanted something that was not on the pre-set menu of options, it was not possible to provide this within the project parameters. In particular, Thwaite Mills would have appreciated more specialist advice on developing hydro power at the site. Also, as there was no networking dimension to the project, Thwaite Mills had no opportunity to learn from the other museums or to pass on their existing knowledge.

SROI analysis

Stakeholders

As discussed above, the main stakeholders are the participating museums. We include the non-participating Yorkshire museums and the wider sector below in the stakeholder map for completeness, but as any effect on these stakeholders will be deferred and contingent entirely upon the dissemination activities of the museums and the project team after the completion of Yorkshire Sustainable Museums

Project, they are excluded from the second stage of the impact map. The impact on the environment is, however, included in both stages of the impact map.

Inputs

- The project is entirely Renaissance funded (£25,000), with all cash expenditure spent on fees to external contractors and consultants (CO2 Sense, who sub-contract to Groundwork)
- In-kind wage expenditure for core project coordination & delivery has amounted to an estimated £2,229 (£1,667 York Museums Trust project manager and £563 for the Project SRO)

Outputs

- The main outputs are the 12 museums supported through the project.
- The activities include producing 12 baseline assessments and 12 Action Plans
- The target business support to be delivered over the course of the project is 40 x 2 hour session of business support, and 12 x 2 day sessions of business support

Outcomes

Participating museums

The outcomes are as identified above, namely:

- Cost savings on utilities consumption
- Securing a sustainable future for historic /specialist buildings & collections
- Better alignment of museum activities with overall mission
- Embedding environmental sustainability within the organisation
- Development of skills and knowledge among staff

However, only Cost savings and environmental outcomes have been quantified within the SROI analysis.

- Cost savings – across the 123 recommended actions for the 12 museums, figures supplied by Renaissance Yorkshire indicate that actual and planned cost savings of £33,215 will be made within 12 months of implementing the actions. Savings are driven by electricity savings (40% of the total) and Gas/Oil (30%).

In addition to the outcomes already described above, there is an additional outcome for the participating museums:

- Leveraged funds for follow-on implementation – over the duration of the project, CO2 Sense applied to Yorkshire Forward for additional support for follow-on implementation activities and was able to raise a further £14,000.

The environment

- CO2 savings – actual and planned savings will amount to 113 tonnes of CO2 saved each year.
- Water savings – 83 m3 of water saved each year
- Waste – an additional 8 tonnes of waste recycled.

A detailed project evaluation produced by Groundwork Leeds is available from Michael.Turnpenny@ymt.org.uk

Impact Map pt 1: stakeholders to outcomes

Project		Green Accreditation	
Stakeholders	Inputs	Outputs	Outcomes
Participating museums	1) £25,000 Renaissance funding p.a. - all cash expenditure spent on fees to external contractors and consultants (CO ² Sense, who sub-contract to Groundwork) 2) £2,229 In-kind wage expenditure for core project coordination & delivery - £1,667 York Museums Trust project manager - £563 Project SRO	12 museums supported - 12 baseline assessments - 12 action plans - 40 x 2 hour session of business support (target) - 12 x 2 days of business support (target)	Cost savings
			Securing a sustainable future for historic /specialist buildings & collections
			Better alignment of museum activities with overall mission
			Embedding environmental sustainability within the organisation
Non-participating Yorkshire museums			Development of skills and knowledge among staff
Wider sector			Leveraged funds for follow-on implementation
The environment			Deferred: development of skills & knowledge among staff
			Deferred: development of skills & knowledge among staff
			Reduced environmental impact of museums

Research sources

- Financial and project information from Renaissance Yorkshire and Groundwork, including Consultancy Contract and 12 museum application forms
- Interviews with:
 - Michael Turnpenny, Regional Development Manager, Renaissance Yorkshire
 - Ben Stone, CO2Sense
 - Louise Hawson, Groundwork
 - Patrick Wildgust, Curator, Shandy Hall
 - Elinor Camille Wood, Collections Officer, Shandy Hall
 - Nina Baptiste, Keeper, Thwaite Mills, Leeds Industrial Museum

7 Collections Cultural Change, in the West Midlands

Introduction and aims

The Collections Cultural Change (CCC) is a project based at Birmingham Museum and Art Gallery (BMAG). CCC has four individual sub-strands:

- Fast Forward – to revise and undertake the next survey of this established benchmarking tool within the West Midlands region.
- Further develop a pest identification and database system
- Develop a Risk Assessment Profiling Tool (RAPT)
- Establish a region-wide Emergency Response Network (ERN)

Unlike the vast majority of the project elements covered within the other environmental case studies in the evaluation, CCC is concerned less with mitigating the environmental impact of museums, than with adaptation: how to get museums to pro-actively respond to, and (ultimately) adapt to, various kinds of environmental and (occasionally) economic pressures.

The project is also unlike most of the other case studies in that a big focus within Collections Cultural Change has been the development of sector-wide tools. The intention was always that the project would have a legacy much beyond both BMAG and the West Midlands region.

Project activities

Fast Forward

The Fast Forward Survey is a biennial survey of museums in the West Midlands that has been running since 2000. It is a benchmarking tool that allows museums to compare themselves against the other 200+ museums across the region (the response rate is over 90%), on a range of criteria. Collections Cultural Change part-funded a revision to the questionnaire, to take in new issues such as museums' digital provision (websites, social networking use, etc.), and new questions on museums' stores: 'are they full now?', if not, 'will they be full in 5 years, 10 years?' and so on. As such, it is a means to capture longitudinal data to track the effectiveness of improvement practices undertaken across the sector in the region, including those related to sustainability. As it is essentially a research and monitoring tool, we will not focus on it within this case study and look, instead, at the remaining three activities, which are more action-oriented and dedicated to tackling issues of sustainability.

Pest identification and database

The initial idea for a pest database has a long history. The origins of the project lay with David Pinniger. David is an acknowledged UK and international expert in the field of Integrated Pest Management (IPM) within cultural heritage. He came up with the idea for a system for identifying and collecting data on pests in 2002/3. Having initially approached the National History Museum who, while being very supportive, were unable to fund the project, he then turned to English Heritage (EH) with the idea as, “*they have brilliant pest monitoring and very well trained staff.*” English Heritage funded the beginnings of the pest database (an excel spreadsheet format), and every year there is an annual report on pests across their properties. Although EH’s work sounds comprehensive, from an entomologist’s point of view, the picture remains frustratingly incomplete as it only follows EH’s property portfolio, which is skewed to the South East. Since this time, Pinniger, operating as a consultant, has secured the involvement of The National Trust in the project. The link with BMAG came about through the pest management training courses that he has been working on with BMAG and Renaissance WM for a number of years.

Identifying pests

There are two components to this strand of the CCC project: the identifying tool and the recording tool. *What’s eating your collections?* is the former: a CD-Rom designed to help people identify insect pests, identify if there is a problem, and then provide some tips on mitigation. The current Renaissance funding has paid to upgrade the resources in the CD-Rom and to develop this into a more interactive online tool.

The CD-Rom approach is already an improvement on previous analogue sources having, for instance, a much wider range of pests than any of the closest textbooks. Not much new content has been required to upgrade the CD-Rom in the current project:

- filming of specific processes to make them easier to understand (e.g. how to wrap objects before freezing, how to vacuum properly etc.)
- adding some new insect photographs (some of them were previously only drawings), including ‘hot spots’ of important details (e.g. bits of the insect that make it distinguishable from others)

and this has been accompanied by some customisation to enable users to make it applicable to their specific pest problems. 300 CD-Roms have been disseminated across the cultural heritage sector to-date.

The major transition funded through CCC is to move the tool into an online resource and include greater interactivity. This is easier to update than the CD-Rom (which is important as new pests are regularly being identified), and much quicker and cheaper than the previous hard copy 'pest posters' that were produced for museums.

Key to the new functionality that has been added is to enable non-trained staff to identify pests – by answering six 'tick box' criteria about the appearance of any found pest. Once these are completed, the website offers a series of pictures of the most likely pest. Thus the system is designed to be the "*entomologist in your computer*", widening out the scope of the kinds of institutions and individuals that can get involved in helping with pest management.

Recording pests

The recording element is to develop the excel spreadsheet into a pest database that museums enter their pest monitoring data into. The aim is for the system to be easy to input into, being based on a standard quarterly check, with minimal additional information to enter beyond what should already be captured. As part of the trialling/piloting phase, the pest recording has been undertaken by BMAG and seven other non-Hub museums in the region.

During the development phase, the data being entered into the system is being verified by the contracted consultant, David Pinniger to ensure quality control of the first run of this element (and David reports that recording has been good to-date). This data is then being combined with data from English Heritage properties in the region (which now stretches back over a number of years), and this is allowing for longitudinal analysis, showing that the system works.

Risk Assessment Profiling Tool (RAPT)

The RAPT project was not originally thought of it as purely a 'sustainability' project. Rather, it was chosen as the Hub was looking for projects with a legacy 'useful tools to help people manage museums', according to Jane Thompson Webb, Collections Services Manager, at BMAG (and project manager for the CCC project). But sustainability has always been implicit in the idea of the RAPT, as it focuses on risks in the round.

The idea for the Toolkit is based on results from a large training programme run by BMAG since 2004 on collections care, and the Collections Care Healthchecks (both supported by Renaissance money in previous rounds). The latter consisted of a museum professional conducting a 'health check' with museums (or to advise on a specific issue) to identify problems and solutions. From this process, it became apparent that museums tend to focus on very specific risks (i.e. they do

not generally take a holistic approach). Concomitantly, it was found that 'risk' is largely ignored by senior staff – and hence it is difficult to act upon any identified problems.

In trying to tackle these issues, RAPT has been primarily designed to provide an awareness (not assessment) of, “*risks to your business, not to your collection.*” It therefore focuses on a wide range of factors that have been developed from a STEEPLED analysis: Social, Technological, Economic, Environmental, Political, Legal, Ethical, and Demographic factors. As such, it attempts to encompass all aspects of sustainability. An example of one of the wider factors that can affect museums was a stimulus to the development of RAPT. In the recent past, two of Sheffield's museums flooded – the museums service had not realised that both were sited in DEFRA-recognised flood plains.

The responses to individual questions within the RAPT are weighted and at the end, each museum is graded, using a traffic light system, to give them an idea of how 'prepared' they are against certain types of risks. The Tool also signposts a series of resources that can help museums to work on the gaps identified by the Tool.

The initial version of RAPT (RAT) was piloted with Hereford Museum (a local authority museum, but very small), Northgate Museum (entirely volunteer-run) and BMAG. Once the online tool (RAPT) was signed off by the project's Advisory Group, a piloting process took place that ran for two weeks in from September 2010 and encompassed approximately 20 museums (including the above museums and the Museum of London).

Looking at strategic business risks means that RAPT differs from the risk assessments that have been carried out within the sector to-date. Whether this is the internal risk registers that are undertaken by museum departments – which tend to be very detailed, but limited to a particular department (and not shared or understood across the organisation) – or the external models that have been developed for museums to use. These latter tools, such as the Waller Model and Machalski Model have tended to be “*quite arduous and very academic*”, and still overly collections focused.

RAPT has been designed instead to be quick and simple to use including, where possible, linking with existing tools (e.g. if museums have gone through a Benchmarks in Collections Care process they are not asked certain questions/are asked different questions). In summary, it is intended to be a strategic, top-level tool, and therefore needs to be completed by someone (e.g. Director/SMT member) who has the authority and the influence to affect change.

Sharon Robinson at The Museum of London, a member of the Advisory Group that has helped to develop the RAPT, and one of the museums that has piloted it, noted that another reason for it not having been developed to-date is arguably the technology base. In the past, the level of functionality available for a relatively low cost would simply not have made a tool like RAPT possible. But now the software is cheap enough (and good enough) to get it built, particularly as regards the data harvesting capacity.

Finally, Jane Thompson Webb also notes that a USP of this element of the CCC project is that it is the only one across the whole Renaissance portfolio looking at risks and collections care. She also believes that this is important as, although the national museums are more experienced in this field, they are not always very good at sharing their knowledge and good practice.

Emergency Response Network (ERN)

There has been a problem with flooding in the West Midlands over the last couple of years (which has affected a number of the museums), caused by changing rainfall patterns: rain comes less frequently, but is heavier. This has reminded everyone in the sector in the region that museums are vulnerable, particularly volunteer-run ones. They have low numbers of staff/volunteers to respond in case of emergencies and the volunteers that they do have are older or retired, and therefore not always in a position to respond.

The aim of the ERN is therefore to provide advice and share resources/knowledge, and to put all the information needed in one place. This has also included the following actions:

- Setting up a 'buddy' system/twinning between museums
- Providing shared access to specialist equipment – e.g. wet and dry vacs, six submersible pumps, six 'just in case'. Renaissance money has been used to buy and house one in every county, totalling six in the region (which can be loaned by all museums as and when needed)
- Funding training on basic Emergency Preparedness – the project team see this service being run on a small subscription basis post-Renaissance.

The first action was to set-up a Yahoo group and upload shared resources to the Group. Launch events then took place in the autumn. These consisted of a half-day session providing information about the Network, the issues it will cover (e.g. salvage, flooding) and options for membership. Throughout the events, members as well as a management group were recruited. In total there were 75 participants at the launch events: 10 from Hub museums and 65 from non-Hub museums. The

first training events were originally scheduled for November but took place in January 2010.

Stakeholders and value

Across the three strands focused on in this evaluation, the Collection Cultural Change project is unusual among the case studies as the value realised through the project largely resides outwith the lead museum on the project (BMAG). Instead, the main stakeholders for the three strands are the participating museums in the West Midlands and the wider museum/cultural heritage community.

Participating museums

The three strands of the CCC project in the evaluation all focus on the importance of taking preventive action to improve the sustainability of museum buildings and collections. In our conversations with the CCC Project Manager and the Renaissance WM Hub Manager, they described the difficulty of being able to attach a financial value to these activities. However, it was easier to identify the outcomes:

- visitors enjoy better cared-for objects and collections which increase the quality of the visit/learning experience
- better collections and building care and management results in less money being spent on remedial work
- the bequest value – caring for objects and buildings ensures that they are still available to be experienced in 10 or 20 years time, in an equally good condition.

Enhancing the visitor and learning experience

Despite the difficulty in isolating the influence of preventive conservation practices and better all-round risk assessment and responsiveness, the CCC projects have largely been funded by making an argument about the positive impact of the contribution that these processes make to improved collections and, in turn, the impact that this has on the visitor experience and the learning offer.

One of the problems that was discussed at our site visit, was the long timescales that are needed to affect and witness change. Jane Thompson Webb gave the illustration of a small, volunteer- led museum in the region, Clun Museum, which was made aware of various risks and collection care issues that they faced through site visits and training sessions funded through previous rounds of Renaissance WM funding. More than two years on, the museum has finally been able to act on all the recommendations made by BMAG's conservation team – having had to raise £25,000 to do so – and has significantly improved the visitor experience in the museum, achieving provisional Accreditation in October 2010.

However, it is only now possible to see the outcomes of a development process that has taken over four years from the first contact (the first meeting took place in August 2006).

More literally, Chris Rice, Head of Heritage Services at BMAG, believes that museums' conservation and heritage science activities should feature more as part of the visitor offer: "*people are interested in conservation*", and cites the example of how The National Trust has successfully helped to raise the profile of conservation among the public as part of their activities.

Reducing the costs of remedial care

A value that, in theory, would lend itself very well to a cost-benefit analysis is the costs of preventive action to improve the sustainability of museum buildings and collections as compared with the costs of remedial action. However, the problem here is that the sector has traditionally kept a tight lid on the costs of remedial action, for fear of publicising what could be seen as a failure of their duty of care and professionalism. This makes it hard to obtain systematic/comprehensive data to properly understand the cost-benefit relationship in question.

What is not in doubt is that there are costs associated with remedial action, and several examples were given during our conversations with the staff at BMAG:

- One of BMAG's properties, Aston Hall, recently flooded because of clogged gutters. Although none of the collections were affected, the plaster work was significantly damaged and resulted in approximately £2-3,00 in repair work being undertaken (compared to the approximately £500 that it would have cost to clean the gutters annually).
- Chris Rice cited an example of artefacts related to James Watt that BMAG had purchased at auction a number of years ago, which needed £30-40,000 worth of conservation to make-up for years of neglect. He also offered ball park costs for general furniture and textile conservation: "*4-figure and 5-figure sums*" respectively.

Chris also pointed out that BMAG and other museums do not have budgets to pay for taking remedial action, as this occurs infrequently, But when it does happen, it is therefore hard to find the money retrospectively and invariably precipitates some kind of shock to the department/organisation (depending on the scale).

Bequest value/option value

Preventive action to improve the sustainability of museum buildings and collections means that they can be enjoyed by future generations. As such, this value is inherently very hard to measure, though it is a correlate to the value that

environmental economics has latterly striven to quantify regarding the value of satisfaction from preserving a natural environment for future generations.

It should be noted that the three values outlined immediately above are generic values associated with all kinds of preventive action to improve the sustainability of museum buildings and collections. There are, however, more specific outcomes that are more closely tied to the individual characteristics of the three strands of the Collections Cultural Change project.

Mainstreaming and routinising the ability to identify pests

The development of BMAG's pest identification and pest database project follows the same rationale that they have taken with the conservation courses that they have been running since 2004. This is to train anyone who is interested in pest management. While this may sound obvious, David Pinniger is clear that, if the training were offered through a 'professionalised' route, such as ICON, then the training would be restricted to only conservators.

BMAG and Renaissance WM, on the other hand, train a far wider spectrum of the museum workforce: building managers, directors of small museums, archival staff, volunteers, and so on. Pinniger goes on to state that, in his opinion, BMAG 'have probably done more than anyone else in the country to train staff in small museums [in pest management]'

This ethos of getting pest management into the 'day-to-day working practices of museums' (Chris Rice) is extended and enhanced with the new online tool, that enables non-specialists who have not even been able to benefit from relevant short course training (such as BMAG's), can still work to identify potential pests – thereby reducing the risk to their collections and the buildings.

Greater awareness and understanding of museums' operating environment/enhanced receptivity to change (RAPT)

In addition to focusing on an organisation's internal structures and processes, Sharon Robinson at The Museum of London believes that RAPT also makes museums think harder – and in a more structured way – about their wider operating context. For instance, the Tool makes them consider how factors such as demographic change or a change of government may have an impact on their organisations. In this way, she believes that a key value of RAPT is that, *"it's about change – being receptive to change, monitoring change, being aware of the things that can affect your business."*

Although Sharon appreciates that, particularly larger museums already undertake a lot of this kind of external and internal review and assessment, she feels that

even among very astute organisations (such as her own employer), *“some things will still get missed.”* For instance, she cites her own experience of completing the RAPT as a pilot user for the Museum of London, which had pulled out *“one or two things we could be doing better.”* In particular, she felt that it had identified some weaknesses in their Business Continuity Plan. The Museum does have one, but it has dovetailed it with the Collections Emergency Plan. During the RAPT assessment, she realised that the Business Continuity Plan has never been tested – unlike the Collections Emergency Plan (which gets tested frequently through low level leaks, etc.). The Museum has therefore decided that they should do some scenario planning sessions to help test and improve the Business Continuity Plan (e.g. what happens if the staff have to be evacuated from the building for several days?).

Renewing/strengthening organisational routines to respond effectively to rare events (RAPT & ERN)

The Museum of London example above illustrates a wider point about two of the tools/activities developed through the CCC project (RAPT and the ERN). This is the importance of being able to respond effectively and speedily, when required, to events that only happen very rarely. Chris Rice crystallises the problem in relation to emergency planning:

“museums don’t have emergencies very often – everyone has a plan (though they may not looked at it in years), and these plans are mostly dealt with in isolation – both within a museum (as it’s one person’s responsibility), as well as externally (all museums look at it individually).”

Emergency planning in the West Midlands, he believes, gets *“even patchier”* when looking across the whole region and across the many smaller, volunteer-led museums.

In this context, the ERN brings people together and, *“it gives them a reason to freshen-up on what they’ve learned and to do CPD courses together... [as] it’s amazing how much you forget!”* It also provides a setting in which members can check and rehearse their emergency planning capability/kit – *“is it still in the right place, does it still work?”* (Chris Rice) – which then helps museums to take further steps.

Museum and cultural heritage sector

The ERN is the only locally/regionally-bounded resource developed through the CCC project. The other two elements of the project are tools that have been explicitly designed for a wider user base, meaning that any stakeholder analysis must include the museum and cultural heritage sector. Clearly, as the RAPT and

pest tools are rolled out, the wider sector will gain all of the benefits identified above. But the project also generates additional value at a macro level.

Cross domain, cross regional, cross disciplinary working

The Renaissance-funded CCC project continues what has become an established pattern of working within the conservation and heritage science community: cross domain and cross disciplinary working. Over the last three decades, a cadre of people across the cultural heritage field have become leaders in the field of IPM. These cultural heritage professionals span distinct domains and institutions (e.g. The National Trust, English Heritage, the national museums, and regional museums). In many other areas of practice, collaboration and knowledge sharing across these domain and institution-specific boundaries occurs both far less often, and less easily.

Within the CCC project, this has not just been the case for the pest identification/database tool (where this method of working has become well established), but has extended to the development and piloting of the RAPT. In addition to the mixed composition of the museums involved in the initial development of the Tool, the Advisory Group also brought together expertise from a wide range of institutions (e.g. ex-Head of Conservation at V&A, now at Cambridge; National Museums of Wales and Chair of Institute for Conservation; Museum of London; Deputy Director of Operations at BMAG, etc.). Sharon Robinson reported that being part of the RAPT Advisory Group was good because the Tool is *“an exciting, innovative project.”* But for her, cross regional and cross disciplinary working *“has been the most rewarding bit of my work [on the project].”*

Beyond the value of cross domain, cross regional and cross disciplinary working, there is additional (potential) value in RAPT and the pest database going forward for the museums and cultural heritage sector. This resides in the fact that both RAPT and the pest database have ‘network effects’ and therefore will produce what economists describe as ‘positive network externalities’ as usage of the tools increases. Specifically every museum that inputs data into RAPT and the pest database adds incrementally to the value of these tools. This is because there is value in the aggregated data captured by these tools over and above the individual utility derived by individual museum users. This value is outlined below.

Future value: Identifying joint need and joint solutions

For instance, when a sufficient number of museums has been through the RAPT process, it may be possible to use it to identify areas of joint need. For example, are museums in general just not very aware of the risks to their buildings? Once this has been identified, the information can be used for a variety of purposes: for lobbying – to, for instance get funding criteria changed (e.g. if RAPT were to show

that buildings are a key category of risk, to include maintenance costs in HLF grants) – or for advocacy, or for improvement. Regarding the latter, the London Hub has already used similar kinds of benchmarking processes to be able to do this:

“to identify collective need and to plan around this – as it’s much more cost effective. RAPT simply takes this idea to a higher level [i.e. cross regionally and potentially nationally]... the fundamental aim is that the data can be harvested and we’ll gain a snapshot of risk across the UK’ (Sharon Robinson).

This applies equally to the pest database. Once there are a large number of institutions feeding into the database, it will allow for a variety of additional analyses (e.g. does the type of building effect what pests museums have? Are there region-wide problems such as clothes moths?). Again, once a joint challenge and need has been identified through the tool, it allows for potentially joint solutions. Jane Thompson Webb gave the example of economies of scale in procurement that might be utilised to tackle a problem, citing the example of buying freezers [with which to freeze objects subject to infestation] – ‘there are currently only three walk-in freezers in the whole region, so are they in the right places (i.e. where the infestations are), or do we need more/to re-site them?’

However, as noted above, realising this value is entirely dependent on the wider rollout and adoption of these tools, and cannot yet be claimed to be an outcome that has been generated to-date through the CCC project.

Entomologists and climatologists

Future value: Tracking insect population movements

There is a wider benefit that will arise from the project should the adoption and uptake of the pest database (in particular) become widespread. This is the value that it will provide for entomologists studying the spread and movement of insect populations.

Over the years, reports of particular infestations of certain insect pests (e.g. Guernsey carpet beetle) indicate that they are spreading. There are a variety of possible reasons for their spread, some of which may relate to climate change for certain species (e.g. woodworm and death watch beetles). However, these reports are not yet comprehensive nor systematic enough to be able to come to any firm conclusions about trends. As David Pinniger explained, *“what is missing is a robust baseline against which change can be measured.”* While in theory surveys of pests could provide this, in reality they are only very, very rarely conducted, so some other means of monitoring and reporting of insect pests has to be found. A widely used pest database, combining data from across the cultural heritage

sector, could fulfil this function. As the above explanation indicates, there is a potential for any such data to also be of interest to climatologists, to look at those species whose habitat is correlated to climate activity and study them as markers of potential climate change in the UK.

Challenges, success factors and legacy

Challenges

Involving senior decision-makers (RAPT)

A lasting problem for activities that focus on preventive action to improve the sustainability of museum buildings and collections is getting the issues high enough up the corporate hierarchy within organisations. Jane Thompson Webb reports that this has been an abiding challenge for their training programme, as BMAG have deliberately made it very practical. The downside of this has been that senior managers assumed 'it wasn't for them' and delegated the attendance, when actually 'they were the ones able to effect change and hence the training programme was for them.'

Not being seen as a strategic issue has also been identified as a challenge for RAPT in particular. For instance, the Tool has been designed for the assessments to be completed by senior management, preferably Director-level and for independents, the Chief Curator or Chair of Trustees. However, the typical profile of staff who have so far got involved with BMAG's training programme tends to be Collections Care Managers, and particularly:

- those very early in their museum careers (who do it as it is more specialised training than they can get in their Museum Studies course)
- people from independents with no museum training
- a small but significant group of mid-career professionals – who have been aware that their practice was a bit rusty, so came to refresh their knowledge and to be in a better position to make a case of asking for resources/funding within their organisations.

The problem is that these are not the kinds of people with the ability to affect any change within their museums (strategic or financial), after they have attended any training/events. In order for RAPT to be successful, it will therefore have to overcome some entrenched notions in the sector regarding the nature and importance of strategic risk assessment. This means that the dissemination and wider marketing of the Tool will be very important in determining its success (see section 1.4.3 below).

Reliance on key individuals (pest database)

As the account of the development of the pest identification and reporting tool above shows, it is the brainchild of essentially one person: David Pinniger. While this has meant that the project has been pursued doggedly and developed coherently, it does mean that the reporting system in particular, i.e. the database, is at present very dependent on David. He is the cog that holds the whole system together ensuring that the consolidation and adoption happens – as he works with all the nationals, The National Trust and English Heritage, as well as across (at least) three Renaissance hubs.

However, it should be noted that this is only a microcosm of the state of play regarding Integrated Pest Management (IPM) in cultural heritage more widely. The 'founding figures' of this domain of expertise – particularly David Pinniger and Bob Child– are about to retire, which constitutes a wider issue of succession planning. To address this, David Pinniger has started a network called 'Future IPM', which brings together the next generation of leaders in the field (including Jane Thompson Webb at BMAG).

Success factors*Working bottom-up and incrementally (pest identification tool and database)*

David Pinniger reports that, over the course of its development, the pest identification and database *"has at times felt like a struggle, lacking strong impetus and a clear steer."* However, he now feels that the bottom-up approach was actually the only way that they could have got to the stage that they are at: *"if you try to start nationally, where do you start? – I think it would have collapsed."* The difficulty of trying to engineer change in this area from the top downwards also, he feels, characterises his wider career in cultural heritage:

"everything I've done has started out very small, one step at a time: you work with one department in one museum – get it working in textiles – then you move onto integrating it into the furniture department, and so on."

Cross-regional

As developing tools for the sector, which will have a value and legacy beyond the life of the Renaissance funding, has been a key aim of the CCC project, the involvement of practitioners from outside the region has been crucial in ensuring the successful delivery of RAPT in particular. RAPT is one of the very few cross-Hub projects, with the Museum of London involved on the Advisory Group and Renaissance London having part-funded the Tool.

Sharon Robinson from the London Hub/Museum of London feels that, in the past, museums and Hubs have perhaps been put off attempting cross regional working

as there was an over sensitivity about “*not wanting to tread on people’s toes.*” However, Sharon has not encountered this at all so far on the RAPT project. Moreover, she feels strongly that cross regional working, sharing of knowledge and resources – making sure that people are not re-inventing the wheel and putting in bids in their Business Plans for the same things – is the only way forward for the sector.

The one cautionary remark offered by Sharon is that there is a limit to how far this cross regional working can be ‘stretched’, and that these limits are imposed by geography. London to Birmingham is within easy travelling distance, and this has been very important due to the need for face-to-face visits and meetings. But she feels that it would not be feasible to work with further afield Hubs – giving the example of the North East (having worked there herself).

Dissemination and transferability

Achieving the full benefits of the pest identification tool and database and the RAPT will require adoption across the sector as a whole (see section 1.3.2). However, as also noted above (in section 1.4.1), a key challenge for RAPT to achieving this is to win buy-in from the senior figures in the museum world. It is they who need to complete the assessment – rather than reverting to the current default action of devolving it down to Collections Management staff.

To this end, the partners involved in RAPT started their marketing and dissemination strategy for the Tool by launching it at this year’s MA Conference. Also, BMAG are planning to visit and do soft launches at a regional level across England. They had initially planned to do one big launch in Birmingham, but realised that they were not going to get enough of a turnout from the level of museum management and Directors that they were looking for.

Legacy

The announcement of the dissolution of the MLA initially had some implication for the legacy of one of the CCC projects, as the RAPT was initially going to be hosted on MLA’s website.

However, it has instead now been adopted and hosted by the Collections Trust. It will also be signposted from whoever takes over Accreditation. In fact, as part of the revisions to the Accreditation scheme, undertaking a RAPT assessment will now be a requirement for any museum looking to get Accreditation. This adoption from wider sector bodies stems from the fact that both the Collections Trust and the Accreditation team felt that RAPT was a useful tool that filled a current gap – “*they saw that there is nothing else quite like it*” (Sharon Robinson).

SROI analysis

Stakeholders

The stakeholders are as described above in section 1.3: participating museums, the wider museum and cultural heritage sector, and entomologists and climatologists.

Inputs

- The total cash funding for the overall Collections Cultural Change project, including Fast Forward, is £125,000,
- The total cash funding for the elements of the project included in the evaluation (pests, RAPT, ERN) is £97,000
- All cash funding has been provided by Renaissance: £92,000 by Renaissance WM and £5,000 by the London Hub
- Cash wage expenditure breakdown covers Project Manager (Collection Care Officer £31,401 and one other paid member of staff (Collection Care Assistant) £25,590
- Cash non-wage expenditure on fees to external contractors and consultants of £52,000
- Additional in-kind wage expenditure accrued to the project related to 250 hours of BMAG Management & governance time, at a value of £6,250 and 35 hours of managerial level time within BMAG's Planning & support staff at a value of £875, and 30 hours of assistant level time within BMAG's Planning & support staff, at a value of £450

Outputs

- Four Hub museums and four non-Hub museums directly involved in the project elements evaluated in the West Midlands, covering two local authority and two independents museums
- 300 pest CD-Roms distributed
- 2 online resources created
- 8 pest recording databases created and completed in the West Midlands
- 20 number of museums involved in piloting the RAPT
- 75 participants at the ERN launch events (10 from Hub museums and 65 from non-Hub museums)
- 65 number of members of the ERN Group

Outcomes

The outcomes are as described above. As none of these can be monetised with any remote degree of accuracy within the capacity of this evaluation, no quantification has been attempted and therefore the second Impact Map has not been included.

Figure 1. Impact Map pt 1: Stakeholders to outcomes

Project Collections Cultural Change			
Stakeholders	Inputs	Outputs	Outcomes
Participating museums	1) The total cash funding provided is £97,000 - £92,000 by Renaissance WM - £5,000 by the London Hub Cash wage expenditure covers: - Project Manager £X,000 - One other paid member of staff £X,000 Cash non-wage expenditure on: Fees to external contractors and consultants of £52,000	8 museums participating directly in the West Midlands -300 pest CD-Roms distributed -2 online resources created - 8 pest recording databases created and completed in the West Midlands - X number of museums involved in piloting the RAPT - 75 participants at the ERN launch events - X number of members of the ERN Group	Enhancing the visitor and learning experience Reducing the costs of remedial care Bequest value/option value Mainstreaming and routinising the ability to identify pests Greater awareness and understanding of museums' operating environment/ enhanced receptivity to change Renewing/strengthening organisational routines to respond effectively to rare events
Museum and cultural heritage sector	In-kind wage expenditure for: - 10% of Renaissance Hub manager time (£X,000) - 250 hours of BMAG Management & governance time (£X,000)		<i>All of the above plus:</i> - Cross domain, cross regional, cross disciplinary working - Future value: Identifying joint need and joint solutions
Entomologists & climatologists	- 35 hours of managerial level time within BMAG's Planning & support		Future value: Tracking insect population movements

Research sources

- Financial and project information from Jane Thompson-Webb at BMAG and Rachel Cockett, Renaissance West Midlands
- Interviews with:
 - Jane Thompson-Webb, Head of Collection Services at BMAG
 - Rachel Cockett, Hub Manager, Renaissance West Midlands
 - Chris Rice, Head of Heritage Services at BMAG

8 SHARE, in the East of England

Aims and activities

SHARE is a unique training programme that is helping to boost skills and capacity within virtually all museums in the East of England. The concept is simple: the Hub Museums share their specialist skills by delivering training sessions for other, typically less well resourced, museums. This provides bespoke and specialist training to museums across the region for a low cost, while building regional connections and partnerships.

Accompanying the training sessions are 'assignments', more detailed seminars and workshops that are usually held with a smaller group or even a single museum. Some assignments are follow-ups to training sessions. Networks of museums have been set up to help identify their own and the wider sector's training needs around, for example: Costume and Textiles, Design and Display, and Audience Development. If any training needs cannot be met by Hub Museum staff, suitable external consultants are bought in.

Between SHARE's launch in April 2009 and October 2010, the programme has delivered 135 training sessions and 114 assignments. These involved over 1,200 participants. 78% of all registered museums in the East of England had taken part by the end of 2009, and this proportion has probably risen since. The participants include professional museum staff as well as many volunteers.

The Renaissance East of England team manages SHARE. It is the principal focus for Simon Floyd, the Renaissance Workforce Development Officer, and for Katy Swift, the Administrator. Other members of the team provide a modest amount of support, for example around communications.

Management by Renaissance East of England means that synergies with other regional museum development programmes can be maximised. For example the lead museums for the Sustainable Museums project (profiled elsewhere in this document) are sharing their knowledge with other interested museums via SHARE. The East of England Regional Conservators and Museum Development Officers have also been brought together to form the SHARE Advice Network, which champions the scheme to the sector.

Stakeholders and value

Participants have consistently rated SHARE training as being high quality and important to their work (for example, see table below).

Survey of a sample of training session participants, 2010

Questions	Results
How would you rate the training session overall?	<ul style="list-style-type: none"> • Excellent (rated 6 out of 6) 69% • Very good (rated 5 out of 6) 24% • Other scores 7%
How important was today's training for the work of your museum?	<ul style="list-style-type: none"> • Vital (rated 6 out of 6) 47% • Very important (rated 5 out of 6) 38% • Other scores 15%
If the training you attended today was not available through SHARE, what would you have done?	<ul style="list-style-type: none"> • I would have to manage without 72% • My museum would have paid for me to go on a similar or related training 19% • Other responses 9%

As shown above, almost three quarters of participants also believe that without SHARE, they would not be able to access such training, due to financial constraints. In any case, training which is so closely tailored to regional needs is not available commercially, and is not available within the region (so SHARE also saves on travel costs).

The Hub Museum staff members who deliver the training believe that they benefit in CPD terms. They gain the chance to consolidate their knowledge, to enter into a debate with their peers, and to increase their confidence around public speaking and delivering workshops.

“SHARE has been a very positive thing for us to be involved in. As a manager, I welcome the chance SHARE gives me to develop my team in ways which might not otherwise be possible, with the added benefit of helping other museums along the way.”

Ian Haswell, Exhibitions Manager, Museums Luton

The peer-to-peer structure of SHARE means that its training sessions are tailored to specific regional needs, and the trainers and participants build connections with other museums in the region. This unlocks new opportunities. For example, the assignments between Hub Museum staff and training participants have so far inputted to four successful Heritage Lottery Fund bids. The Networks too have expanded their role beyond planning for training: they also explore issues that they see as important within their area of expertise. SHARE continues to support their meetings and helps them to reach a wider audience when appropriate: for example by assisting them to publish guidelines for the sector.

One final benefit of SHARE is to boost the perceived credibility and skills of the East of England museum sector. The British Museum cites the scheme as

supporting it to engage with museums within the region (see below). The National Trust is also now involved.

“SHARE brings a unique potential to combine local, national and international expertise across a region. This is undeniably attractive to a national museum seeking to strengthen its partnership work and we’re delighted to be working with SHARE.”

John Orna-Ornstein, Head of London and National Programmes, British Museum

Challenges, successes and legacy

During the pilot phase, many museums did not see how SHARE would benefit them. For the 2009 launch, the East of England team therefore:

- Secured up-front 1,000 person days from Hub Museum staff, which made it clear that there was enough resource for all;
- Conducted thorough consultation to shape the programme;
- Engaged the region’s Museum Development Officers and Regional Conservators to promote SHARE to museums.

It is clear that another success factor is the capacity and energy that Simon Floyd, the Renaissance Workforce Development Officer, has brought to the programme. Projects which bring together and intensively network groups of organisations almost always require a dedicated post to drive forward and to coordinate activity, and Simon fulfils this role very capably. Simon’s tips based on delivering SHARE are:

"In making SHARE work we have learnt a few key lessons about skill-sharing along the way. Here's a few that spring to mind:

- *Never ask people for more than they feel able to give;*
- *Don't expect people to ask for, or even know what they need. Assert an offer – people need encouragement;*
- *It's all about making and maintaining relationships;*
- *Get like minded individuals together and things happen – enthusiasm goes a long way;*
- *Don't get hung up on process. Need comes from action – not the other way round;*
- *Trust the instincts of those who do the job, and be prepared to take risks;*
- *Wherever possible, take away the burden of administration;*
- *Be collaborative and listen – try to meet need with practical solutions;*
- *Be friendly and communicate simply."*

Simon Floyd, Renaissance Workforce Development Officer

All stakeholders feel that SHARE offers excellent returns for the relatively modest amount of funding it requires, and are keen to continue beyond 2010. A membership body has been established for the museums who have participated so far. It is exploring various models for continuing SHARE, including Renaissance funding.

Cost benefit analysis

This analysis focuses on the planning and delivery of training sessions and assignments, over the April 2009 to October 2010 period, plus the costs and time to manage these elements of the SHARE project. This is because it is straightforward to perform a cost-benefit calculation for these elements – unlike the SHARE Networks which clearly have a value, but which it is difficult to find a suitably robust financial proxy for.

Stakeholders

- Renaissance East of England, which manages the project;
- Hub Museum and other staff who donate their time towards planning and delivering training sessions and the assignments;
- The museum staff who participate in the training sessions and assignments (i.e. the beneficiaries).

Inputs

- £106,430 Renaissance funding, including direct project costs as well as time spent on the project by Renaissance employees ;
- 5,066 hours donated by Hub Museum and other staff towards planning and delivering the training sessions and assignments (including time spent by the SHARE steering group).

Outputs

- 135 training sessions benefitting 948 participants;
- 114 assignments benefitting 288 participants.

Outcomes

The outcomes in the short to medium term are:

- Improved skills and capacity within East of England museums sector, particularly the less well resourced museums;
- Better networked East of England museum sector featuring multiple new partnerships and connections;
- Improved profile and external perceptions of East of England museums sector.

The ultimate impacts will be more resilient and resourceful museums, delivering more and better quality experiences to their users.

Impact Map pt 1: stakeholders to outcomes

Project SHARE, in the East of England region			
Stakeholders	Inputs	Outputs	Outcomes
Renaissance East of England;	£106,430 Renaissance funding;	135 training sessions for 948 participants;	Improved skills and capacity within museums sector;
Hub Museum and other staff who donate time;	5,066 hours donated.	114 assignments for 288 participants.	Better networked museum sector featuring new partnerships and connections;
Participants in the training sessions and assignments.			Improved profile and external perceptions of museums sector.

Cost-benefit calculation

This calculation focuses on the unique, economically sustainable, way that SHARE delivers training sessions and assignments by drawing on knowledge already within the region. The calculation compares the resources invested by

Renaissance with the cost of the training sessions were they purchased from an external provider.

Museums Association (MA) training sessions are used as the proxy for training sessions purchased from an external provider. These cost £165 p/head for MA members and £225 p/head for non-MA members. Renaissance East of England estimates that 50% of SHARE participants are MA members. Using this estimate, the cost of purchasing MA training sessions for SHARE's 1,236 participants would be £241,020. SHARE therefore has a cost-benefit ratio of 1 to 2.26, i.e. it delivers **£2.26 of benefit for every £1 invested** in the project.

Furthermore, SHARE also serves to network the East of England museum sector and improve its profile (though these are difficult to locate satisfactory proxies for and so to include within the calculation). The total benefit that SHARE delivers is therefore likely to exceed by some way £2.26 for every £1 invested.

Impact Map pt 2: outcomes and value

Project: SHARE, in the East of England region				
Outcomes	Indicator	Financial proxy	Value	Ratio
Improved skills and capacity within museums sector;	Cost of training received if purchased from external provider	MA training sessions @ £195 p/head* for 1,236 participants	£241,020	2.26
Better networked museum sector featuring new partnerships and connections;	-			
Improved profile and external perceptions of museums sector.	-			

* Cost p/head adjusted to reflect 50% participants being MA members

Research sources

- Focus group with Renaissance East of England team members: Jo Warr (Hub Manager), Simon Floyd (Workforce Development Officer), Amanda Burke (Evaluation Officer);
- Interview with Margaret Greeves (the Fitzwilliam Museum, and outgoing Chair of the SHARE steering group);
- Financial information and survey data from Simon Floyd and Amanda Burke;
- Quotations from stakeholders from *SHARE: A year of development April 2009 – April 2010* (Renaissance East of England, 2010).



SHARE
Support, Help and Advice
from Renaissance East

9 Survive and Thrive, East Midlands

Introduction and project aims

Survive and Thrive is a project that offers expert consultancy to museums and heritage organisations across the East Midlands with the objective of establishing them into more dynamic, entrepreneurial and economically sustainable organisations. The project has two strands, each of which is managed separately and, apart from a small overlap, involves separate participant museums.¹

The main project strand primarily focuses on the governance of museums. It developed out of similar projects in the two previous business planning periods. These earlier projects looked at business planning and, to a certain extent, reviewing organisational structures, and offered a menu of programmes that museums could participate in. One of the shortfalls of the predecessor programmes was that museums did not take enough ownership of the offered activities. Survive and Thrive builds on this finding and was devised as a more tailored support programme for museums in 2009-11.

A total of 21 museums (mainly charitable trusts, small local authority museums or museum networks) are involved and the project is delivered by Cultivate-Em. Some of the work has been further subcontracted to Arts & Business, as well as other specialist delivery agencies.

The second project strand, Flagship Visitor Attractions, is one of three 'Flagship' programmes in the East Midlands, all of which are funded by Renaissance (the others being Flagship Volunteer Providers and Flagship Learning Providers). This strand works with ten sites that have reached or have the potential to reach more than 100,000 visitors per annum. The project aims to review all aspects of the organisations' operations and to support them to increase their visitor numbers and develop as visitor attractions through specialist consultancy. This strand is delivered by Focus, a specialist consultancy in the area of museums development.

Project Activities

Governance strand

The Survive and Thrive governance strand consists of the following key activities:

- Carrying out an organisational diagnostic which identifies museum needs and issues in relation to better governance and management. This audit includes the review of all existing policy documents and recommendations for areas of

¹ The four museums involved in both strands are: Alford Manor House, Galleries of Justice, Creswell Crags Museum and The National Tramway Museum/Crich Tramway Village

improvement (e.g. need to improve Forward Plan, need for child protection and equal opportunities policy, etc.).

- Reviewing the organisation's constitution and legal status, including recommendations on areas that need reviewing or upgrading.
- Providing a number of training days on cross-museum issues. This includes a training day on board development facilitated by Arts & Business and a training day and surgeries on business planning.
- Supporting tailored actions, depending on the needs of the museums. Based on the recommendations from the organisational diagnostic and the legal review, one or more priority areas are identified that need improving. The project has set aside a fund of £500-600 for each participating organisation to provide additional consultancy to meet these specific needs. For example, Northamptonshire Museum Forum did not have a constitution and developing this was beyond the scope of the general Survive and Thrive programme. The bespoke fund was used to work with the museum to develop their constitution. Other examples include board development and training, reviewing governance structures such as the Friends schemes, reviewing business plans, improving audience development policies, providing support for organisational staff resource management, reviewing marketing plans or budget/forecasting procedures.
- Three 'Go and See' events which consist of a case study visit to a specific museum (e.g. Wallace Collection) to illustrate good practice in a particular area (e.g. friends scheme, audience development etc). These events also provide opportunities for networking.
- Development of a toolkit which provides a mixture of relevant links, guidance and case studies

Flagship Visitor Attractions strand

The Flagship Visitor Attractions strand also started with an audit or 'health check' of the participating sites in February and March 2010. This audit was carried out as part of the separately Renaissance-funded 'Flagship' programme and identified key action points for each organisation. The £25,000 Survive and Thrive fund is used to support the implementation of one of these action points, all of which address issues that will help the organisation to improve their visitor offer. Four of these projects took place in Quarter 4 of the financial year 2009/2010 and the remaining in 2010/11. They included the following:

- Feasibility study for a capital investment project – Alford Manor House conducted a feasibility study to convert a barn into an additional, flexible museum space

- Review of catering facilities and services – The Collection, Lincoln, identified a low turnover from their catering operations and was looking how to improve these.
- Review of retail facilities and services – Northampton Museum and Art Gallery received help to improve and enhance their retail operations.
- Review of corporate hire facilities and services – New Walk Museum carried out a review into how they could use and improve their spaces for corporate hire.
- Marketing or brand strategy development – Snibston Discovery Museum, Creswell Crags Museum and Gallery of Justice all produced a marketing or brand strategy. Following a recent substantial HLF grant, Creswell Crags needed to professionalise their marketing operations and received support to do so. As part of this, a specialist consultant advised on the museum's product development (e.g. lettings for birthday parties and conferences, introduction of Friends scheme), marketing research (e.g. introducing quarterly visitor research), pricing structures (e.g. introducing a "Hunters and Gatherers" visitor pass to get multi-entry for all parts of the site), improving the visitor journey/signage on-site and on audience development (how to diversify audiences). The Gallery of Justice is currently looking to re-brand itself and was looking at how to integrate the new brand into their existing one.
- Fundraising strategy – Crich Tramway Village received help to develop staff skills and processes around fundraising (e.g. identifying potential funding sources or support on how to structure a grant application).
- Quality assessment accreditation – Nottingham Castle Museum and Art Gallery and Wollaton Hall and Deer Park went through the application process for VisitEngland's Visitor Attraction Quality Assurance Scheme that included an assessment, feedback and the reception of the award.

Each project was a relatively small-scale intervention with a fund of approximately £3,500-4,000 per project (with the exception of Nottingham Castle and Wollaton Hall receiving a lower amount). It was decided that this approach was preferable to making fewer, bigger investments for two reasons: firstly, the different structures and needs of the museums. As the range of support services described above shows, museums had very different priorities (e.g. need for improving retail offer vs. need for capital development) and there were only very few commonalities that could have been addressed by a general support programme. Secondly, museums were at very different stages of development and the scale of operations in a particular area varied widely across the organisations. For example, the audit identified the value of lettings for corporate hire at the Gallery of Justice to be £82,000, while Creswell Crags only generated £1,000 through this means.

Devising a common programme would have compromised the ability to address each organisation's particular issues.

Stakeholders and value

The main stakeholders of the Survive and Thrive projects across both strands are the participating museums. However, at least in the second Flagship Visitor Attractions strand, museum visitors have the potential or have already benefitted from the project too. The different areas in which the project has provided value to the stakeholder groups are described below.

Participating museums

Financial rewards

In a couple of cases, organisations in the Flagship Visitor Attraction strand have already seen beneficial financial outcomes from the investment and support. These include:

- **Financial leverage:** Based on the feasibility study at Alfred Manor House, a grant of £20,000 could be secured from the Community Builders Fund towards the actual capital project.
- **Additional earned income:** Based on the marketing review (in particular the product development and pricing strategies), Creswell Crags Museum has been able to generate additional income. Uptake of their conference facilities has increased by 50% and sales of the newly introduced 'Hunters and Gatherers' visitor pass have equally been very positive.

The reviews of catering operations at The Collection, of retail facilities at Northampton Museum and Art Gallery and of the corporate hire offer at the New Walk Gallery are all also aimed at increasing the organisations' earned income. Finally, Crich Tramway Village is hoping to see financial gains through improving their external fundraising activities.

Financial rewards are likely to be less relevant for organisations participating in the main Survive and Thrive governance strand, at least as a direct, short-term project outcome. This is due to most activities in this strand being focused on internal organisational management and processes. Having said this, a number of organisations in this strand are receiving advice on fundraising or marketing strategies, similar to the above examples.

Skills development

Both project strands offer tailored consultancy advice and support. Strengthening the skills base of the organisations and the individuals involved is one of the most important, if only implicitly mentioned, aims of the project. Rebecca Clay, Learning

Officer for Marketing at Creswell Crags Museums, reports a significant learning benefit from the programme support. Her academic background was in curating and collections management but working for a small organisation like Creswell Crags Museums with only five full-time staff members she was required to take on different tasks, including education and community engagement work, as well as marketing. Though Rebecca is acquiring formal marketing qualifications at present, she feels that the targeted support has enabled her to gain many new skills in the field of marketing, with the benefit of seeing them immediately applied in practice.

Another example is Northamptonshire Museums Forum, participant of the Survive and Thrive governance strand. Most of the Forum members are volunteers, and as Forum chair Jane Baille confirms, while they do have a range of skills, they do not necessarily have the right skills in all the areas that they end up working in. She feels that Survive and Thrive has helped the volunteers who were engaged to increase their skills in the area of good practice governance and management, in particular with regards to putting in place a better constitution. Learning has taken place both through specific training, the one-to-one consultancy (*“working alongside knowledgeable people”*) and talking to other museums.

The need to develop a broader skillset is common among many independent museums, both at staff and at board level. In the case of Heckington Windmill, another participant of the governance strand, the board benefitted from significant training and development. This included areas such organisational visioning and planning, but also considering staff succession planning. Jim Bailey, a member of the Friends of Heckington Windmill, is convinced that the *“learning that some of the committee members have made is great.”*

The project managers Claire Brown and Katherine Wilson are convinced that for both project strands, there will be a legacy through the skills that staff have developed and the remit of this legacy will be beyond the current organisations involved in the programme as staff take these skills with them when they move to other organisations in the future.

Increased ability to embrace organisational change

Supporting museums to embed and embrace organisational change is at the core of the Survive and Thrive project. In the case of the Flagship Visitor Attractions programme, this organisational change is mainly concentrated around the self-image of organisations. All of the ten participant organisations are aiming to become major visitor attractions. However, as Renaissance project manager Katherine Wilson stresses, this requires them to understand and embrace the meaning of the term. She feels that ‘visitor attractions’ describes a more holistic

concept of an organisation primarily focusing on the needs of visitors, as compared to their previous, narrower perception as a collection-focused museum site. The Survive and Thrive fund has made a contribution to this change in thinking by supporting almost exclusively strategies that are ultimately aiming to improve the visitor experience at the site.

As well as embracing current organisational change, the Survive and Thrive governance strand is looking to prepare organisations for future change. Through carrying out in-depth reviews of organisational structures, including all legal and financial aspects, and through implementing necessary change the project aims to make museums more robust organisations which will be more prepared for the future and operate legally. While some of the 21 museums have a real crisis situation (e.g. around the powers of Board members or of the Friends), others only require light-touch support to “become better” at what they’re doing. As Renaissance project manager Claire Brown argues, many small museums are simply not aware of their legal requirements, such as the change of the charity law in 2006. But approximately a third of the museums participating in the programme have specific needs in terms of adapting their organisation to a major change (mostly to cope with significant upscaling of their operations through a received or anticipated project fund or the start of operations in a new building post-capital development).

Heckington Windmill provides a good example of an organisation becoming better prepared for anticipated organisational change through the programme support. The organisation has submitted an HLF bid to buy the mill house and to develop the site more generally, which is likely to significantly increase the scale of its operations. In preparation of this purchase, the organisation needed to change its charity status into a company limited by guarantee. This took place at the beginning of 2010 and was based on legal advice that pre-dated the Survive and Thrive involvement. The programme support focused on a more subtle, while also more difficult change relating to the overall organisational culture, as well as internal management and governance issues, all of which needed addressing if the organisation was to achieve their aim of becoming a visitor attraction of national importance in the medium-term. As Jim Bailey explains, most members of the governing committee have very little experience of how to engage with communities. The initial training day delivered by Arts and Business, was a “*real eye opener*” for the committee members with regards to their new responsibilities. It helped them to understand what change is necessary within the organisation, as well as identifying ways in which the organisation needs to restructure and what new forms of governance would need to be implemented. Jim Bailey remembers: “*It was a very intense day for some of the committee members who are not necessarily used to such workshops and training.*”

However, he is convinced of the necessity this change: *“If we don’t change, we won’t survive!”* The windmill is an ageing organisation. The charity was formed nearly 30 years ago and many people from that time are still within the organisation – Jim, himself in his 50s, is one of the *“young ones”*. The training day identified that there’s a need to recruit new people who are younger but also who have the right skillset to carry the organisation to fulfil its ambition. In addition, it also helped committee members realise the more immediate benefits of organisational change: the need to fulfil governance criteria for their HLF funding bid.

Jim Bailey concludes that the Survive and Thrive involvement has *“been a great experience. A small organisation like Heckington Windmill could not have afforded to pay for such training on their own, or simply would not have been able to locate appropriate trainers. Our involvement has opened our eyes to the future.”*

Increased ability to embrace external change

In a number of cases, Survive and Thrive support has also helped organisations to prepare for change in their external environment, in particular their funding base. Northamptonshire Museums Forum is one example. The organisation is currently supported by a Museums Development Officer (MDO) and one of the outcomes of the project for the Forum has been to explore how they will work if the MDO support is no longer available. In addition, they also received support to develop their advocacy plan to position themselves for other available pots of funding (e.g. section 106 funding). Jane Baille feels that *“with all the changes coming up next year, there was a need to prepare ourselves.”*

Preparing for the future includes ensuring that the organisation has all the necessary planning documents (e.g. there was a need to write a business plan) as well information that can be used for advocacy purposes (e.g. collecting visitor data at the Forum, rather than just the member level, which will help demonstrate their economic impact going forward). Jane Baille believes that the outcomes from the Survive and Thrive programme will help the Forum and its members to become more committed and professional – which will be key to their future development. As an organisation, *“Survive and Thrive has helped us to approach the future with more certainty.”* In addition, as the MDO support will be no longer available to individual member museums, the Forum may be able to take on this role and give advice at a regional level – thanks to the learning made through the programme.

Widened networks

Another benefit of the Survive and Thrive programme, if mainly the governance strand, has been to support networking across museums in the region. Through

the common training sessions, but especially the specific 'Go and see' networking events, the participating organisations have been able to make new contacts. These can be useful in a variety of ways:

- Exchange of ideas: museums report that they've been able to benefit from talking through their issues and being able to get ideas from other museums in a similar situation
- Benchmarking and comparison: some museums have found it useful to get a sense of their development stage compared to others. For example, Jane Baille says: *"At the first meeting we realised that we were actually doing quite well (compared to other participants). But it also became very clear to us that we still needed further work and that we can't just be complacent."*
- Resource for the future: While some of the museums have not benefitted from the networking yet, most see the value of having contacts and networks as a potential resource of knowledge and advice in the future.

Visitors

As all Flagship Visitor Attractions ultimately aim to improve the organisations' visitor experience, visitors can be seen as a beneficiary of the programme in the medium-term. Rebecca Clay feels strongly that all changes they have made at Creswell Crags are benefitting the visitors. This includes simple things like having added signage, using appropriate communication methods and language or engaging visitors in the service delivery through feedback forms and regular surveys.

Challenges, successes and legacy

The two Survive and Thrive project strands were delivered separately from each other, but they have used a common approach: providing specialist consultancy support to quite a large number of organisations across the East Midlands region, using relatively small amounts of money (though, the governance strand included more general sessions, too). By doing so, the project has been able to support very specific interventions, in addition to making a very valuable contribution to the organisational development more generally, in many cases. However, the specificity of the projects potentially limits the extent to which more general conclusions can be drawn with regards to the effectiveness of particular interventions.

The governance project strand is in many ways about preparing organisations for future internal or external change situations. It could be argued that the project takes a very broad definition of sustainability, in that it makes organisations 'more robust' in order to be able to cope with future scenarios, which may or may not happen (e.g. an organisation collapsing due to severe governance failures).

However, in addition to this more general 'preparedness' the project has supported organisations in improving on their internal skills and processes that will face very immediate challenges and change scenarios, in particular relating to the current restructuring of the funding landscape.

SROI analysis

Stakeholders

The main beneficiaries of the project are the participating museums. Museums from both project strands have been considered in the SROI analysis.

Inputs

- The project budget was £125,000 in 2010/11, split into £25,000 for the Flagship Visitor Attraction strand and £100,000 for the governance strand. The project was 100% Renaissance funded.
- The full budget was allocated to delivery by consultants: £25,000 were paid to Focus and £100,000 to Cultivate-Em.
- In the case of the Flagship Visitor Attractions strand, the Renaissance Hub manager spent approximately 2% and the project manager 8% of her time in-kind on the project – equivalent a financial contribution of £735 and £2,325 respectively during the year.

Outputs

- In the Flagship Visitor Attraction strand 6 Hub museums and 4 non-hub museums participated. 6 of these museums are local authority museums and 4 independent museums
- In the governance strand 1 Hub museum and 20 non-Hub museums participated. 2 of these were local authority museums and 19 were independent museums [CHECK for overlap between museums]
- 31 organisations [check overlap] have participated in development activities, in particular:
 - 1 non-hub museum participating in a feasibility study for capital investment project
 - 1 hub museum participating in the review of catering facilities and services
 - 1 hub museum participating in the review of their corporate hire facilities
 - 1 hub museum participating in the review of their retail facilities
 - 3 organisations participating in the development of marketing and brand strategies (1 hub and 2 non-hub museums)

- 1 non-hub museum participating in the development of a fundraising strategy (including 3 individual participants)
- 2 hub museums participating in quality assessment accreditation
- 15 organisations participating in legal and constitutional reviews (1 hub museum and 14 non-hub museums)
- 11 organisations participating in board development activities (1 hub museum and 10 non-hub museums)
- 281.25 hours development activities taken up by Hub museums involved in Flagship Visitor attractions project
- Review of catering operations: 60 hours across 3 participants
- Review of retail facilities: 82.5 hours across 4 participants
- Review of corporate hire facilities: 52.5 hours across 3 participants
- Brand strategy: 86.25 hours across 3 participants
- 210 hours development activities taken up by Hub museums involved in Flagship Visitor attractions project
- Feasibility study: 60 hours across 3 participants
- Brand and marketing strategies: 150 hours across 7 participants
- 2 sessions of development activities taken up by Hub museums involved in the governance strand
- 1 session on legal and constitutional reviews (duration unknown)
- 1 session on board development lasting 3 days
- 41.5 sessions of development activities taken up by non-Hub museums involved in the governance strand
- 15 sessions on legal and constitutional reviews (duration unknown) across 14 participants
- 26.5 sessions on board development lasting 26.5 days across 10 participants

Outcomes

The following outcomes are the key outcomes from the project:

- Financial rewards
- Skills development
- Increased ability to embrace organisational change

- Increased ability to embrace external change
- Widened networks

While financial rewards have only been reported anecdotally, we further interrogated museum participants' skills and network development, as well as issues surrounding organisational and external change through a survey of case study projects. The aggregate findings from this survey are presented in the main report.

Impact Map pt 1: stakeholders to outcomes

Project: Survive and Thrive, East Midlands			
Stakeholders	Inputs	Outputs	Outcomes
Participating museums	1) Total income: £125,000 in FY 2010/11	▪ 31 museums participating in project	▪ Skills development
	2) Total cash expenditure: £125,000 on consultancy fees for project delivery:	▪ 31 museums participating in development activities as part of the project	▪ Financial rewards
	▪ £100,000 for governance strand ▪ £25,000 for Flagship Visitor Attractions strand	▪ 491.25 hours of development activities delivered in FVA strand	▪ Increased ability to embrace organisational change
	3) Total in-kind expenditure: £3,060 in FY 2010/11 [check]	▪ 43.5 sessions of development activities delivered in governance strand	▪ Increased ability to embrace external change ▪ Widened networks

Monetisation

Financial rewards have been reported anecdotally, however there was no sufficient data to carry out further cost-benefit analysis on this project.

Research sources

Financial and project information from Katherine Wilson and Claire Brown, Renaissance East Midlands

Interviews conducted with:

- Katherine Wilson (Strategic Project Manager, Renaissance East Midlands)
- Claire Browne (Museum Development Network Manager, Renaissance East Midlands)
- Liz Weston (Curator, Mansfield Museum)
- Rebecca Clay (Learning Officer for Marketing, Creswell Crags Museum)
- Jane Baille, Chair of Northamptonshire Museums Forum
- Jim Bailey, Committee member of Friends of Heckington Windmill

10 Creative Industries, at Ironbridge Gorge Museum Trust

Aims and activities

Ironbridge Gorge Museum Trust comprises ten award-winning museums spread along the River Severn valley, in the shadow of the world's first bridge constructed of iron. The Ironbridge area is described as the birthplace of the Industrial Revolution and the Trust enables the public to experience historic furnaces, factories and workshops at its museum sites at Coalbrookdale, Ironbridge, Jackfield and Coalport.

The Creative Industries project packages together several strands of activity with diverse aims. The principal aim is to strengthen the Trust's economic sustainability through enhanced retail activities and footfall, and by connecting with local businesses. But the project also benefits the participants of two new programmes, one aimed at local entrepreneurs and one for local residents to work with new artists-in-residence. Finally, there is an element of shared learning, with the Trust and ten other museums together exploring up to date best practice in retailing.

The total Renaissance funding for Creative Industries is just over £330,000. The key project activities are profiled in turn, below.

Retail environments, stock and skills

The Trust was aware of the need to improve its retail outlets to make them more appealing to visitors, encouraging them to increase dwell time and purchase more items. To achieve this, Trust shops at the Museum of Iron, Museum Gift Shop and Coalport China Museum were refitted with new lighting and display units. In parallel, the variety of products available is increasing and stock is becoming more relevant to the location. For example, ceramics now feature more prominently at the Coalport China Museum shop, while iron products are found at the Museum of Iron. Products are now rotated on a seasonal basis in order to encourage interest and increased custom from repeat visitors.

The Trust's key retail staff also received training modules comprising Visual Merchandising, Sharing Shropshire, People First, Welcome All, and Welcome Host. The sessions were run jointly with staff from the Trust's peers to spread the benefits and to encourage knowledge exchange: the Herbert Museum and Art Gallery, Acton Scott Working Farm, Ludlow Museum, Shropshire Museums Service, Stoke Museums, Bilston Art Gallery, Coventry Transport Museum, and the British Postal Museum & Archive.

Retail product development

The Creative Industries project invested in developing the Trust's 'Made in the Gorge' and 'From Our Collections' product ranges, both of which aim to introduce more exclusive and (often) higher value products into Trust shops, thus differentiating Ironbridge's retail offer from High Street retail and from other museums. The new ranges also link the Ironbridge sites together offering a common retail brand, plus bespoke and site specific products.

The 'Made in the Gorge' range features products produced by artisans and craftspeople based in open studios across the site. Visitors can see the artists at work in their studios then buy their products in Trust shops. Experiencing the products being created builds shoppers' sense of connection with them, and increases demand. The initiative also responds to consumer demand for locally-made British products. Some of the products have specific Ironbridge related designs or motifs. While increasing income for the Trust, 'Made in the Gorge' also helps the featured artisans to increase their turnover and viability. The Trust sells works on a sale or return basis, to avoid a build up of inventory and to reduce risk for Trust shops.

The 'From Our Collections' range features items which relate specifically to the museums, at a range of prices. For example, the products include ornaments cards, pictures and key-rings featuring images of the museum and its artefacts. Decorative tiles and replicas of historic tiles are sold at the Jackfield Tile Museum. Given Ironbridge's extensive and diverse collections, there is huge scope for expanding this range. There is also an opportunity to tie in 'From our Collections' products with specific on-site exhibitions.

At present, both product ranges are only sold on-site. However, the Trust is keen to sell in partnership with other regional museums and online.

Events and fairs

Ironbridge now hosts the annual 'Gorgeous' crafts fair; an event which provides an opportunity for local craftspeople to display and sell their work. Originally run by the Shropshire Guild of Crafts People, the Trust decided the fair represented a good match for them given the Trust's extensive hospitality facilities and capabilities. It is anticipated that hosting the fair will be a cost effective way to attract more and different visitors to Ironbridge and to sell more products produced by on-site artisans.

Finally, the Fusion Gallery at Jackfield Tile Museum was improved via new lighting, providing an attractive hireable space for artists and thus attracting in more visitors, providing greater retailing opportunities for the artists and adding to

the visitor offer at the Jackfield site. Two Ironbridge artisan tenants are currently holding a collaborative exhibition in the Gallery.

Artists in-residence

This strand of the project also aims to further develop product ranges, and to develop international links. Two artists, one from South Africa and one from Mexico, were contracted via a competitive tendering process. They are collaborating with resident artisans to develop new products. The South African artist specialises in jewellery (using recycled materials), and the Mexican artist specialises in fine art and embroidery, which gave her a particular interest in the historic costumes that are reproduced at Ironbridge. It is intended that the artists-in-residence will contribute to the Trust's education programme and other initiatives such as a Mexican Festival of the Dead event, and the Trust's Cultural Olympiad event 'Science Sport Life'.

'Advance' entrepreneurship programme

The Advance programme started in September 2010 and is aimed at helping young people (18-25) to develop entrepreneurial business ideas. 20-25 participants will work with advisers to progress their ideas with the support of their course tutor, before pitching their ideas to a panel of local business people in a 'Dragons Den' style format. Participants will be recruited from local schools, colleges and businesses. The idea for Advance was developed by a local consultant with existing links with the Trust. It is a good fit with Ironbridge's history of entrepreneurialism, and it builds on the Trust securing the STEM contact for Shropshire – the first museum to do so. Advance is also considered a good way to for the Trust to build relationships with local businesses and schools, which could potentially result in increased visits, income from corporate events, or sponsorship.

Stakeholders and value

The principal stakeholder is the Trust itself, as it benefits directly from the additional income generated and by improved connections to local businesses. Further stakeholders include the artisans based on-site plus the Advance entrepreneurs and the peer museums which received training.

While that the project creates value in various ways, for each of its stakeholders, the Trust points out that the project is fundamentally about economic sustainability. This is because even the Advance and artist-in-residence strands of the project work towards boosting footfall at Trust sites (and therefore admission fees and ancillary spend) and building relationships between the Trust and schools and businesses who may spend or donate.

Nikki Williams, a glassmaker based on site, considers the value of the project from her perspective:

Nikki produces a range of ornamental glass products, with process starting at £12 and topping out at several hundred pounds. She has been based onsite for about 3 years and works out of an open studio in the 'Fusion' building which she shares with another artisan – a sculptor. Since summer 2010 Nikki has sold works in Trust shops as part of the 'Made in the Gorge' range. Before this time she sold direct from her studio.

Nikki believes that the Creative Industries project is very successful and that drawing attention to the work of local artisans is important to their business viability and also enhances the distinctiveness of the Ironbridge area. She has experienced an increase in sales of approximately 5-10% since selling via the Trust shops, and has also received a major commission from someone who first saw her work in a museum shop.

Challenges, successes and legacy

One particular challenge for the project is that the retail improvements have been introduced while visitor spend has been declining. The Trust attributes the decline to the recession. This shifting baseline will make it difficult to calculate the amount of visitor spend uplift that should be attributed to the project. Some Trust staff feel that simply maintaining the pre-recession level of spend would represent a positive result.

However, there are some early signs that the project will indeed uplift retail performance. This is demonstrated by:

- Reports from shop managers that the redesigned shops are attracting increased 'dwell time' by visitors;
- Reports from artisans based on site of increased sales, as a result of products being displayed in Trust shops (see above) ;
- The Gorgeous crafts fair selling out of stands.

The other legacies of the project, apart from retail performance, will take some time to become apparent – particularly in terms of the longer term and indirect impacts on the bottom line resulting from new relationships formed with prospective visitors and with local business and schools.

Cost Benefit Analysis

Stakeholders

The key stakeholders are:

- The Trust itself, which benefits directly from the income generated;
- Onsite artisans involved in developing new product ranges;
- Advance programme and education session participants;
- The 10 partner West Midlands Museums.

Inputs

The key inputs are described below. The time input of artisans based in studios at Ironbridge is not included as an input because they would have been working onsite at the same task regardless of this project.

- Renaissance funding of £330,391;
- 25% of the Trust's Director of Operation's time to oversee the project;
- 259 hours of other Trust staff time.

Outputs

The outputs of the programme are as follows:

- Three re-fitted and improved museum shops plus improvements to the Fusion Gallery;
- On-site 'Gorgeous' craft fair;
- Two extended product ranges – Made in the Gorge and From Our Collections;
- Two international artist residencies and collaborations with onsite artisans further developing new product ranges;
- Advance entrepreneurship programme benefitting 20-25 participants;
- Five joint training sessions for museum retail staff.

Outcomes

The principal outcome is increased economic sustainability for the Trust based on improved retail performance and product ranges – as well as access to new visitor markets via Gorgeous, and new relationships with businesses and schools.

Further outcomes comprise:

- (For onsite artisans) Increased turnover and economic sustainability;
- (For Advance participants) Improved skills and business success chances;
- (For the ten partner museums) Strengthened retailing skills and partnerships.

Figure 1: Impact Map

Project Creative Industries at Ironbridge Gorge Museums Trust			
Stakeholders	Inputs	Outputs	Outcomes
Ironbridge Gorge Museums Trust	Renaissance funding of £330,391; 25% of the Trust's Director of Operation's time to oversee the project; 259 hours of other Trust staff time	Three improved museum shops plus improved Fusion Gallery	Increased economic sustainability for the Trust comprising improved retail performance and product ranges - as well as access to new visitor markets via Gorgeous, and new relationships with businesses and schools
		On-site 'Gorgeous' craft fair	
		Two extended product ranges – Made in the Gorge and From Our Collections	
		Two international artist residencies and collaborations with onsite artisans	
Onsite artisans and crafts people			New products developed for sale via Trust shops
Advance participants		Advance entrepreneurship programme benefitting 20-25 participants	Improved skills and business success chances
The 10 partner West Midlands Museums		Five joint training sessions for museum retail staff	Strengthened retailing skills and partnerships

Cost-benefit calculation

As explained earlier, while the early indications are that the project is successful, two methodological challenges are:

- The retail improvements have been introduced while visitor spend has been declining. This shifting baseline makes it difficult to calculate the retail income uplift that should be attributed to the project.
- The other legacies of the project, apart from retail performance, will take some time to become apparent – particularly in terms of the longer term and indirect impacts on the bottom line resulting from new relationships formed with prospective visitors and with local business and schools.

To this must be added the further difficulty that retail performance is partially driven by visitor numbers, so forecasting retail income also requires consideration of future visitor numbers. A reliable cost-benefit calculation is therefore not possible at this stage.

To give some indication of the possible future outlook, the Trust Deputy CEO's estimate is for visitor numbers to grow at 1 to 5% over the next five years, with spend per head remaining approximately static and profit margins improving.

Research sources

- Interviews with:
 - Anna Brennand, Deputy CEO and Director of Finance and Resources, Ironbridge Gorge Museums Trust
 - Traci Dix-Williams, Director of Operations, Ironbridge Gorge Museums Trust
 - Nikki Williams, artisan based on-site
 - Additional data and information from the Trust.

11 Sustainable Museums North West

Aims and activities

Sustainable Museums aims to enable each of the participating museums to develop their retail operations and to explore opportunities for joint procurement. The project has focused on improving profitability through focusing on five main areas; the products on offer, the physical environment of retail spaces, performance, profitability and people (i.e. skills). The total Renaissance investment in the project is £115,000.

The project has its origins in a 2006 initiative called 'Raising the Game' funded by the North West Development Agency to support museums and galleries in the region to develop products and services which drive tourism and increase economic sustainability.

Sustainable Museums was structured to create a network of retail managers amongst participating museums who worked together to identify bulk buying opportunities and to exchange knowledge, expertise and equipment such as old shop fittings. Retail managers also undertook fact finding missions to exemplar museums identified as representing best-practice in the area of economic sustainability including the Victoria and Albert Museum and the London Transport Museum. Despite some initial resistance to focusing on sales, the staff managed to engage all other teams in their museums in thinking about how to improve the retail offer.

The participating museums were recruited in two waves, with six core museums in phase 1, and a larger group for phase 2.

- Phase 1: Bolton Art Gallery and Museum, Harris Museum and Art Gallery, Manchester Art Gallery, Manchester Museum, Tullie House, Whitworth Art Gallery;
- Phase 2 drew together museums from the following areas: Bolton; Blackburn; Oldham; Central Manchester; Rochdale; Salford; Stockport; Tameside; Trafford; Wigan & Tatton Park.

The project secured the attention of museum directors by highlighting the finding of the earlier 'Raising the Game' research, that that of the 1.4m visitors to North West museums, 1.1m do not spend any money at all during their visit. Museums were recruited on the basis of their existing retail performance, and to represent a variety of governance structures so that the learning from phase 1 would be relevant to all types of museum.

The work strands implemented with phase 1 museums included:

- **Improved retail displays and spaces.** The shops were redesigned and refitted to make them brighter and more attractive to visitors, with better shelving and display units which were both more appealing in themselves, and allowed for a greater range of products to be stocked. Shops were also more intelligently designed, with glass cases to give exclusive feel to certain products, smaller child-height units for displaying toys, and mobile units which can be easily moved to make space for events.
- **Improved products.** There was a tendency for participating museums to stock a narrow range of products and for these products to be general rather than specific to each museum. Retail managers worked to make the products more relevant to the museum through introducing products based on collections such as postcards with images of items in the collections, toys relating to the Harris Museum and Art Gallery's toy collection and products relating to its focus on the industrial revolution.

Particular attention was given to post cards and posters developed with images of collections, but with a focus on stocking those images which proved most attractive to visitors rather than allowing the choice of images to be driven too much by which items in the collection were considered to be of greatest cultural importance. The stock contained in the shops was also rotated to ensure new products for repeat customers.

- **Joint procurement.** Project manager Marcus Chase from Manchester Museum stated that a key aspect to the Sustainable Museums project was to "*regard all museums recruited for the project as one single business*". Doing so unlocked a range of cost saving solutions including bulk buying, product and best practice sharing. Bulk-buying resulted in a large 'quick win' for the project for example through enabling postcards and books to be bought in large volumes and Egyptian themed items that previously only Manchester Museum bought in sufficient quantities to negotiate sufficiently low prices to ensure profitable sales. Bulk buying of certain items also negated the need for individual museums to store large amounts of stock that they were forced to buy in order to keep prices down, contributing to further savings.

Stakeholders and value

The stakeholders are the participating museums which benefit from increased retail profits, underpinning their economic sustainability.

In addition to profits, Phase 1 museums reported that much of the value of the project lay in creating a network of museum retail managers. Up until Sustainable Museums, no such network had existed, despite the fact that similar networks of

curatorial staff and collections staff between different museums had existed for some time. Through regular contact and cooperation, museum retail managers were able to work together to drive efficiency savings and share ideas for improving profitability. It also enabled resources to be shared. For example, rather than being thrown away, the old shop fittings of the Harris Museum and Art Gallery were passed on to another museum which was able to re-use the second-hand units.

For phase 2 participants, the training and workshops they received were reported to hold greater value as it was informed by real life museum examples generated in phase 1. Sustainable Museums therefore also has created a body of evidence surrounding best practice for museum retail. This is also demonstrated in the use of examples from the project at this year's Museums and Sustainability conference.

Challenges, successes and legacy

Retail managers reported that there was some initial resistance to taking the strong sales focus necessary to achieve success with their projects, particularly amongst staff whose jobs had a more cultural or curatorial focus. However, they reported that this initial resistance was overcome, and many non-retail staff enjoyed contributing ideas for new products.

The longest term legacy of Sustainable Museums may be a lasting network of retail managers who are likely to continue to deliver economic benefits through working as a team. They can now call each other up with problems and ideas in a way that was not previously established.

A joint online project is also now being trialled which will provide a platform for participating museums can market and sell products. This might be particularly useful for linking into events such as the 2012 Preston Guild, to reach people who are interested in the event but cannot attend in person.

Cost benefit analysis

As this project has a strong retail focus, the approach taken to evaluating its impact was to focus on increases in earned income experienced by the retail and catering functions of participating museums during the course of the Sustainable Museums project.

Stakeholders

The key stakeholders for the project were the six phase 1 museums and the larger group of phase 2 museums.

Inputs

Inputs for the project were a mixture of financial investment and staff time in-kind support. The full list is as follows:

- Renaissance investment: £115k
- NW Development Agency £60k
- Partner venue funding £87k
- Staff time valued at £5.6k

Outputs

The project outputs can be regarded as the three main areas where improvements were delivered as well as the development of staff. The outputs are as follows:

- Improved retail facilities (and one improved catering facility)
- Improved products and product selection
- Joint procurement
- Staff development – increase in knowledge and skills and creation of a network of retail managers

Outcomes

The outcomes of the project are mainly financial, in line with the key aim of increasing profitability. The fact that there was a staff development aspect to the project might result in long-term financial returns, although these were not factored into the calculations.

Impact map part 1: stakeholders to outcomes

Sustainable Museums North West			
Stakeholders	Inputs	Outputs	Outcomes
Phase 1 museum and gallery group	Renaissance investment £115k	Improved retail and catering spaces	Increased earned income and reduced dependence on public sector funding
Phase 2 museum and gallery group	NW development agency - £60k	Improved retail and catering products	
	Partner venue funding - £87k	Joint procurement arrangements	
	Staff time valued at £5.6k	Staff development	More able and empowered retail staff

Cost benefit calculation

To track financial performance, participating museums submitted data for a baseline year (2007/08) against which improvements could be measured over

financial years 2008/09 and 2009/10. A combination of actual and projected data was used for financial year 2010/11 since the project wasn't complete at the time the data for this evaluation was collected in November 2010.

As shown in Figure 1 (below) the cost benefit of the project was calculated through comparing the £267,612 investment in the project against the £553,361 sum of all additional profits from all participating museums above the baseline year over the three years that the effects of the retail improvements were agreed to last. The result is that the Sustainable Museums project has a cost-benefit ratio of 1 to 2.07, i.e. it delivers **£2.07 of benefit for every £1 invested** in the project.

Impact map part 2 outcomes to impact

Sustainable Museums North West			
Outcomes	Indicator	Financial proxy	Value
Increased earned income and reduced dependence on public sector funding	Additional profit generated over three year project lifespan (actual / forecast)	£ 553,661	2.07
More able and empowered retail staff	-		

The increased revenue and profit forecast to be generated by each participating institution is shown in Figure 3. It should be remembered that while much of the increase in profit is reported as a direct result of Sustainable Museums project interventions, a number of different factors could contribute to the stated increases. These factors, including increases to total numbers of museum visitors (which has been experienced by museums across the country) and increased spend per customer, are summarised in Figure 4.

Figure 3 Increases in Revenue and Profit

Additional revenue and profits at Sustainable Museums phase 1 and 2 museums						
		Baseline 2007/08	Actual 2008/09	Actual 2009/10	Actual / forecasted 10/11	
Bolton Museum & Art Gallery	Revenue	24,321	24,344	30,083	33,091	
	Profit	1,216	3,165	8,724	14,560	
Manchester Art Gallery & Platt Hall	Revenue	289,872	364,887	357,335	360,000	
	Profit	136,240	175,146	178,668	183,600	
Harris Museum & Art Gallery	Revenue	54,200	58,342	64,902	88,548	
	Profit	18,610	21,020	27,530	43,558	
Tullie House Museum & Art Gallery	Revenue	71,546	76,447	75,641	75,641	
	Profit	4,293	21,405	24,962	33,282	
Manchester Museum	Revenue	185,011	207,028	239,104	255,841	
	Profit	40,702	57,968	90,860	112,570	
Whitworth Art Gallery	Revenue	56,110	60,895	50,560	41,965	
	Profit	6,733	10,961	14,662	16,786	
Greater Manchester Museums Group (Phase 2 Museums)	Revenue	n/a	n/a	1,700,000	1,763,000	
	Profit	n/a	n/a	636,460	774,080	
						Total
Total additional revenue		0	110,883	136,565	237,026	484,475
Total additional profit		0	81,870	137,610	334,181	553,661

Figure 4 Additional revenue drivers

Additional revenue drivers (Figures for all Phase 1 museums combined)				
	Baseline 2007/08	Actual 2008/09	Actual 2009/10	Actual / forecasted 10/11
Total museum visits	1,562,118	1,516,302	1,633,585	1,681,081
Total number of transactions	167,722	164,205	168,090	175,577
Conversion rate (Visitors to customers)	10.74%	10.83%	10.29%	10.44%
Average spend per transaction	3.61	4.44	4.64	4.47

12 Maximising Income, at Museums Sheffield

Aims and activities

The Maximising Income project takes a twin approach to increasing commercial income: developing a new events programme, whilst upgrading shop displays and stock to keep customers engaged. The ultimate aim is to maintain Museums Sheffield's commercial income steady or to modestly grow it – avoiding a decline in income during a financially challenging period.

MS transitioned to charitable status 12 years ago and has a long track record for securing income from non-public sources. The immediate backdrop to this project, however, was the recession of 2007 on and the consequent fall-off in retail, private hires by public and private clients, and school visits. MS is also working off debts that were incurred through a capital project in 2008.

On the events strand of the project, the innovative first step during an initial 6 to 9 months trial period was to consult museum staff with the aim of generating a wide variety of new and creative event ideas: 20 of these ideas were then selected to be piloted. These included events linked to temporary exhibitions as well as some events which were not, such as Murder Mystery and Dating evenings. MS also successfully developed and market tested corporate hire and wedding packages. To facilitate corporate hires, MS also used Renaissance funds to invest in moveable panels that can section off a large gallery, plus new furniture and upgraded AV equipment. The AV upgrade was felt to be particularly important for attracting corporate hires.

On the retail strand of the project, MS appointed an experienced merchandiser to advise on upgrading the shops in the Millennium Gallery and on the other 3 MS sites. He helped MS to refocus the shop through the introduction of a more inviting design and a better-focused product line (more bespoke / expensive products linked to MS collections and exhibitions, rather than 'standard' postcards and calendars). Again, MS encouraged input from its staff; for instance a 'Retail Ideas' board has been installed in the main office to collect ideas.

Retail ideas board in Museums Sheffield's main office

MS also began under the Maximising Income project to support fundraising by establishing closer ties with local corporate sponsors and developing a legacy offer. Mark Hilton, MS's Head of Finance and Resources, acknowledges the possible need to rebrand MS to communicate more clearly to sponsors that MS is an independent charity and not part of the Local Authority.

Stakeholders and value

The main stakeholder is MS itself, as it directly receives the income generated from the events and retail.

The redevelopment of the shops appears to have been an instant success, resulting in a noticeable change in people's approach to, and opinion of, MS shops. As the investment costs were relatively low due to the re-use of existing equipment and furniture, the investment was more than returned within months of the re-opening. MS estimates that the shop has a life of about 3 – 5 years before further investment is needed.

MS made valuable discoveries from the trial period of the events programme. Exhibition-independent events (Murder Mystery, etc.) are not profitable for MS due to the high costs involved in organising them (although they might be viable for other museums). Corporate hires are promising, particularly now that MS can offer a flexible and high quality space at the Millennium Gallery for larger events, complete with a competitive hospitality package. Weddings, although 'high maintenance', are being successfully booked in.

Nick Dodd, MS's Chief Executive, highlighted that MS would not have been able to afford the level of experimentation within the project without Renaissance funding. He also believes that involving staff in generating and developing event ideas was a way to make them continue to believe in the value of the organisation, connecting them with senior management and empowering them.

Renaissance funding was also vital for the capital investment which built on the findings of the trial phase. Finally, Renaissance funding meant MS was able to invest in an experienced merchandiser to not just bring in expertise and an independent perspective on the shop and stock development, but also to transfer vital knowledge to Phill Sowter, Head of Operations, and to the museum shop staff. The staff are now equipped to more effectively manage the shop (i.e. renewing and swapping stock, customer care), which, according to Nick Dodd, will lead to increased longevity of the shop and therefore to increased economic sustainability of MS retail operations.

Challenges, successes and legacy

MS's senior managers believe that the success factors have been:

- Building on MS's 12-year commercial track record;
- Setting realistic targets: steady and modestly growing income, rather than setting overambitious targets during a recession;
- Input and flexibility: inviting staff to come up with new ideas for events, staff training, and having the time to experiment with various events to find out which are most successful – this has helped to build a more entrepreneurial mindset among staff;
- Hiring a very experienced merchandiser to assess and re-design the shop space whilst also transferring his skills to MS staff.

Another success factor is probably the senior management team's direct involvement (the project is led by the Chief Executive): this sends out a clear message about the strategic priority of maximising commercial income, and it facilitates decisions about the direction and cost-benefit of each element of the events programme.

Having been directly involved in the refurbishment of the shops and received training from the merchandiser, Phill Sowter is now at a stage where he can pass MS's learning on to other museums in the hub. This is however proving more difficult than expected, which MS attributes to most other local museums in Yorkshire being at an earlier stage in terms of earned income generation, and therefore MS's more advanced ideas are not yet applicable to them.

In a more strategic approach, MS also initiated a pan-regional Hub exercise which involved museums from York, Leeds and Bradford all putting some money aside to develop a joint product line. Unfortunately, it proved impossible to find any commonality amongst the museums so the idea was abandoned in early 2010. Nevertheless, these museums appear to have valued the exchange of experiences and information – all museums have now had some consultancy, having realised the necessity of seeking advice, staff training and considering retail as an integral part of museum operations rather than an add-on. Through a higher level of free-flowing information and understanding, MS hopes that more common ground might be developed in the future.

Cost Benefit analysis

Stakeholders

The main stakeholder is MS itself, as it receives the main benefit of the project: new capacity to ensure a steady revenue income and long-term economic sustainability. Ultimately, MS visitors will benefit from MS's enhanced capacity to preserve and enhance its sites and collections, as well as more attractive retail and event offers.

Inputs

- A data return was not received and therefore no cost-benefit analysis could be carried out for this project

Outputs

- Refurbished shops and event space/ new equipment
- New, commercially successful events

Outcomes

- Increased income from shop and events
- Improved skills and increased involvement of staff

Impact Map pt 1: stakeholders to outcomes

Project Maximising Income at Museums Sheffield			
Stakeholders	Inputs	Outputs	Outcomes
Museums Sheffield	£XX Renaissance funding	Refurbished shops and event spaces	Increased and sustainable income from retail and events
	XX hours of senior management time	New events programme	
	XX hours other staff time		

Research sources

- Financial and project information from MS
- Interviews with:
 - Nick Dodd, Chief Executive, MS
 - Mark Hilton, Head of Finance and Resources, MS
 - Phill Sowter, Head of Operations, MS

13 Building Capacity at Chatham Historic Dockyard Trust

Aims and activities

The project is investing approximately £30,000 Renaissance funds per year to employ a new Fundraising Officer post for Chatham Historic Dockyard Trust (CHDT). Paul Barnard was appointed in December 2009, later than planned. The project will now run over 15 months.

The twin strategic aims for the project are to enhance the capacity for fundraising at CHDT while the senior team was occupied with the No. 1 Smithery capital project; and to move CHDT beyond 'typical' fundraising to secure major grants for capital works by instead targeting in-kind and revenue support, and smaller grants.

Paul's key responsibilities are to:

- Support and advise the Museum and Heritage Director and the Chief Executive of CHDT on fundraising;
- Research and identify fundraising opportunities with a focus on small / revenue rather than large / capital funding;
- Develop fundraising tools and systems;
- Raise the profile of CHDT both locally and nationally, to boost awareness among potential funders;
- Secure new income of £30,000 in FY 2010, a deliberately modest target given the up-front preparatory work required.

The main targets of new fundraising activity are companies and foundations. For the former, the aim is to establish long-term partnerships with local companies. Under one such partnership, Southern Water (SW) is investing £10,000 in a new educational programme that will form part of CHDT's Science Technology Engineering and Mathematics (STEM) learning offer. SW initially approached CHDT as it wished to develop a project suitable to accompany its roll-out of water metering across the region. The educational programme will run over summer 2011. CHDT also hosted a Customer Day in June 2010, which offered free entry for all SW customers and included an educational 'water village' for young people.

In terms of foundations, Paul identified and developed approaches to a number of foundations which have not previously supported CHDT. Assisted by him, CHDT came close to a spectacular success: it was one of six shortlisted applicants for £4 million awards from the Colyer-Fergusson Charitable Trust, which was planning to wind down. In the event however, the Trust decided not to disband after all.

The results of fundraising by the end of FY2010/11 comprise:

- Over 200 approaches, many of which are still awaiting decision;
- A total of £38,933 funds raised;
- 22 awards, a substantial proportion of which are from new funders.

Paul was also instrumental in securing the National Lottery Award for best educational project 2010, for HMS Cavalier, the Second World War Destroyer that is one of the star attractions at the Dockyard. The Awards are an annual search to find the UK's favourite Lottery-funded projects, and are ultimately decided by a public vote. Paul submitted CHDT's entry to the competition and facilitated the process throughout. The Dockyard consequently benefitted from coverage on the BBC's Lottery Big Night programme on Saturday 4th September 2010. CHDT estimates the Advertising Value Equivalent (AVE) of this coverage as £68,280.

National Lottery Award acceptance for CHDT

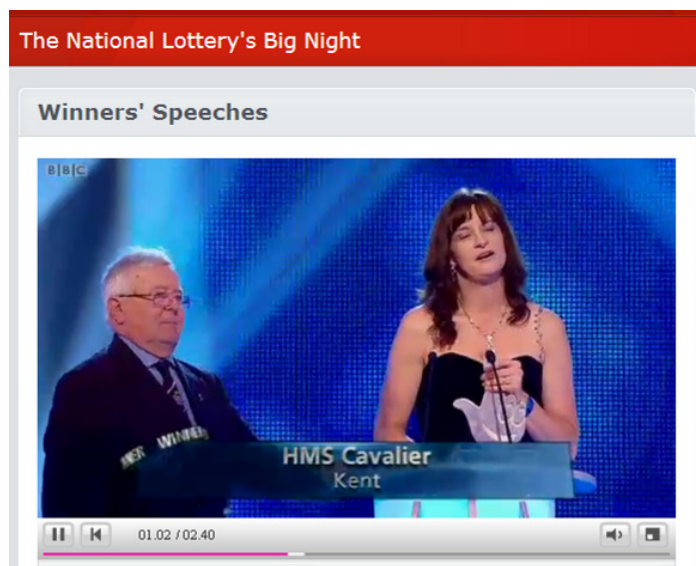


Photo credit: BBC

Stakeholders and value

The immediate beneficiary from the project is CHDT itself, as it directly receives the increased income and publicity generated. Ultimately, this will help CHDT to extend its offer to visitors and users of the Dockyard.

For example, the funds that Paul secured towards the bi-annual 'Art in the Dockyards' programme for local amateur artists, enabled CHDT to use a larger space for the programme and to better promote it. This, according to Joanne Creighton, CHDT's Learning and Development Director, resulted in:

"[...] an overall increase in the programme's profile. As a result, there have been more entrants to the Art in the Dockyard competition this year than ever before and new members of the local community have been engaged with the work of The Historic Dockyard for the first time."

Sponsorship by SW also enabled CHDT to target a new group for the education programme: local fathers who might not generally be museum visitors but who want to share fun and meaningful activities with their children. According to Joanne:

"There is a certain risk involved in developing a project with such a new angle. It would have been very difficult for us, as a charitable trust, to commit to developing a programme for such a niche audience with an uncertain outcome."

SW is keen to point out that it too will benefit from the project. Beverley Thompson, SW's Senior Public Affairs Manager believes that:

"CHDT has done a great job in the amount of imagination that went into creating the programme and highlighting the values that are important to SW – water efficiency, environment and education. It has given us enormous kudos to be associated with such a quality organisation."

CHDT senior management believe that none of these outcomes would be possible without the fundraising post, due to limited staff capacity during development of the No.1 Smithery capital project. They believe that the project will successfully set the scene for enhanced fundraising in future and help to realise the longstanding aim of reducing CHDT's dependence on Government funds while continuing to develop and enhance the site itself. CHDT has ambitious forward plans for further works that boost the revenue generating potential of the buildings and enhance the older visitor facilities to match the high standard now set by No.1 Smithery. In turn these plans will contribute to the efforts to secure World Heritage Site status for the Dockyard and its defences.

The draft Fundraising Strategy for the next 5 years therefore continues to include the Fundraising Officer post. The Strategy is expected to be refined and adopted by the CHDT board in late 2010 / early 2011.

Challenges, successes and legacy

CHDT senior management believe that the success factors are:

- Taking time to appoint the right person to fill the post;
- Building on CHDT's good track record for capital campaigns;

- Gradually building a good profile within the local community before attempting to capitalise on it by raising money;
- Investing time in raising CHDT's national profile and image in order to unlock realistic chances of fundraising from bigger trusts and foundations. The partnership with national museums for No1 Smithery, and the National Lottery Award, are key to this;
- Setting realistic Y1 income targets that recognise the need for upfront development of systems, and the competition for funds (within Kent, from both Canterbury and Rochester Cathedrals).

CHDT plans to disseminate learning through the Museum Development Officers network, once the project is over. CHDT senior management believe that the focus on revenue fundraising would be interesting to other medium-sized museums and that this will become increasingly necessary and popular in future. However they caution that the specific activities developed at CHDT are unlikely to be directly transferable as they are closely matched to the unique potential of the site and its offer to funders. Perhaps the most important tip is that such fundraising needs to be truly embedded within the museum, which in turn requires up-front investment to enable the person to 'bed down' within the organisation.

Cost Benefit analysis

Stakeholders

At this stage the principal stakeholder is CHDT itself, as it directly receives the increased income and publicity generated. Ultimately, this will help CHDT to extend its offer to visitors and users of the Dockyard.

Inputs

- £30,250 Renaissance funding in FY2010/11, which was spent on the Fundraising Officer salary and on-costs;
- Two hours per week of the Museum Director's time spent supporting the project, valued at £2,857.

Outputs

- A total of £38,933 funds, the majority from new funders;
- Work towards securing National Lottery Award 2010.

Outcomes

- Enhanced economic sustainability resulting from new investment including from new sources;
- Enhanced national visibility and profile.

Impact Map pt 1: stakeholders to outcomes

Project Capacity Building at Chatham Historic Dockyard Trust			
Stakeholders	Inputs	Outputs	Outcomes
CHDT management	£30,250 Renaissance funding p.a.	Over 200 fundraising approaches	Enhanced economic sustainability resulting from £38,933 new investment
	CHDT senior management team time valued at £2,857	Work towards securing National Lottery Award 2010	Enhanced national visibility and profile

Cost benefit calculation

This analysis focuses on the resources invested within FY 2010/11, and the direct financial benefit received in the form of fundraised income. The AVE (Advertising Value Equivalent) of the TV coverage generated is not included due to the difficulty of generating a realistic financial proxy. For instance the BBC, which covered the award, does not take advertising.

The total costs invested in the project comprise £33,107 compared to total fundraised income of £38,933. The Building Capacity project therefore has a cost-benefit ratio of 1 to 1.18, i.e. it delivers **£1.18 of benefit for every £1 invested** in the project.

Furthermore, the project has also made a major contribution to raising the profile of CHDT; and further fundraising applications are outstanding and may come good during the next financial year. The total benefit that the Building Capacity project delivers is therefore likely to exceed by some way £1.18 for every £1 invested.

Impact Map pt 2: outcomes to impact

Project Capacity Building at Chatham Historic Dockyard Trust			
Outcomes	Indicator	Financial proxy	Value
Enhanced economic sustainability resulting from £38,933 new investment	Fundraised income within FY2010/11	£38,933	1.18
Enhanced national visibility and profile	-	-	-

Research sources

- Financial and project information from CHDT
- Interviews with:
 - Richard Holdsworth, Museum and Heritage Director, CHDT
 - Paul Barnard, Fundraising Officer, CHDT
 - Joanne Creighton, Learning and Development Director, CHDT
 - Beverley Thompson, Senior Public Affairs Manager, Southern Water

14 Capacity Building, West Midlands

Introduction and aims

The Capacity Building project is being run by Birmingham Museum and Art Gallery (BMAG). The overall aim of the project is to develop and build more sustainable fundraising capacity across the organisation,

The origins of the project came from both internal and external sources. In 2008, BMAG undertook a 5-year internal forward planning exercise, in which the need to reduce the degree of dependency on public funding was identified as a key development need for the organisation going forward. While BMAG has always engaged in fundraising, this was seen by the Director, Rita McLean, as previously having only been 'ad hoc' and restricted to funding for capital projects.

As BMAG was beginning to see the need for fundraising in a more structured way, they were approached 'out of the blue' by MLA Chief Executive, Roy Clare, with a suggestion for supporting just such a fundraising project. Roy Clare had already been involved with BMAG on a previous project looking at economic sustainability in the museums sector (the 'Entrepreneurial Museum' project). Roy's suggestions came with a separate funding commitment that sits outwith the usual Renaissance business planning process. Rita was then able to use the additional resources given to BMAG by MLA to speed-up and expand her existing ideas for building-up a new fundraising structure.

At the heart of the project lies organisational change, to re-structure the Senior Management Team (SMT) and to appoint dedicated, specialist fundraisers in-house. BMAG had never previously had any in-house capacity. The appointment of the two posts has also been accompanied by a wider organisational change process, designed to make all staff more entrepreneurial and each, in part, responsible for raising funds and generating income.

Project activities

Embedding fundraising and entrepreneurialism

The project began with the appointment of two new fundraising and development posts in January 2009:

- Fundraising & Developmental Manager (Hollie Smith Charles)
- Fundraising & Developmental Officer (Kate Lawton initially, now David Powell)

The Fundraising & Development (F&D) team work to Jo Smith, Head of Projects and Development, whose focus is capital projects and the remaining income generating activities of the Museum (i.e. the shop, tea room and library).

Organisational restructuring was required in order to accommodate these posts. Back of house staff were reduced to allow for fundraisers in the budget, one post was also lost from the SMT, while a new role of Deputy Head of Museum Operations was devised to give greater flexibility to the organisation. Rita McLean felt that strategic organisational development was vital to be able to provide more capacity for fundraising. The Director reported that initially, while there was no resistance to the restructuring within BMAG, *"it had made a few people nervous, but everyone saw the sense of this development."*

The first activity of the Fundraising & Development Manager was to attend team meetings across the Museum, in order to understand each different department and the range of issues that they face. In order to communicate better with senior management, the Fundraising & Development team have also instigated specific fundraising meetings, which are usually attended by 80% of the SMT.

In general, a flat communication structure exists throughout the organisation/disciplines, in which Jo communicates with the SMT and Hollie with the rest of the organisation. SMT is expected to cascade the message down to their staff – not just to leave this task to Jo, Hollie, David and herself. As Rita said, *"we all have to be a part of this"*. The message is always given out at staff meetings, including at the annual staff conferences. Finally, the importance of entrepreneurialism/ fundraising is embedded formally within the staff annual appraisal/ Personal Development Review process, the first of which took place in April 2010. All staff have to review this and have some form of income-generating target, from front of house staff up to the SMT. The response has been encouraging, with lots of different examples from across the Museum (e.g. conservation team renting out specialist equipment, the learning team now charging schools etc.).

Finally, the Museum has also sought to embed fundraising and entrepreneurialism within BMAG by investing in a range of continuous professional development activities for key staff. This includes:

- Arts & Business seminars (on tax effective giving, accounts for charities)/Action Planning training on major donors
- Museums Association training on corporate fundraising
- Institute of Directors in-kind mentor sessions for the Fundraising & Development Manager
- Advice session from the Fundraising Manager at the Natural History Museum

- Freelance in-kind mentoring and consultancy support to the F&D team in particular, as well as to the Director and SMT more generally.

Improving strategic marketing

The first output of the project was to write a two year Fundraising Strategy, with input from MLA head office that included financial targets and quarterly monitoring reports. The first three months of the project were thus taken up with writing the strategy. The three main activities that the Capacity Building project has focused on is increasing income from:

- Corporates – whether through philanthropy or trading activities (e.g. corporate hire)
- Trusts and foundations – widening the number and type of trusts and foundations that BMAG applies to, and also branching out from only pursuing capital funding to applying for revenue funding
- Individuals – by deliberately targeting 'high net worth individuals' as well as introducing new philanthropic means by which people can get involved in the museum (e.g. developing new Patrons and 'Adopt an Object' schemes) and re-organising existing means (e.g. the Friends Group).

The first step to systematising the process of identifying and targeting both corporate and high net worth individuals was to develop a database of regional contacts. This is comprised of companies, CEOs, and rich individuals. As Hollie described, this was essential as, *"we were starting from less than zero"*. The database was then used to contact the top 100 Birmingham companies.

After making this investment in 'intangible' organisational assets (e.g. a database), BMAG then undertook two targeted marketing and profile-raising events:

- A drinks reception at 10 Downing St – taking existing supporters of the Museum down from Birmingham to London, including inviting all of their key lenders to experience 'a glamorous jolly'. The drinks reception also improved BMAG's own networking with the sector at a national level (e.g. with The British Museum).
- A House of Commons reception – inviting local MPs and trusts and foundations, and using the recently acquired Staffordshire Hoard to raise awareness and money for the Museum.

The team also reviewed the various 'products' that they were marketing. In particular, this was the Museum's overall approach to corporate hire and events, also including assessing the catering offer. An early decision was to move away from consumer events, such as weddings, as the profit on these was small when

compared with corporate events (due to the longer time that weddings require in the venue, the greater number of staff that have to be employed on the day, and the administration overhead running up to the day). The print marketing communications for corporate events hire were also reviewed and overhauled, together with new print material for the various new schemes being devised /re-launched.

The new philanthropic products were then launched in summer 2009:

- Corporate Patrons scheme – Deutsche Bank was the first Patron
- Corporate sponsorship scheme
- Adopt an Object scheme
- Individual Patrons scheme – launched at the Friends AGM

Reviving the Museum Trust

Hollie has also worked to revive the charitable arm/ custodian Trust of BMAG. The Trust had been “*moribund for years*” but has now become much more energetic. It now has its own Treasurer, new Trustees have been appointed after a review, and there are new terms of membership. The Museum Trust was the main vehicle for fundraising for the Staffordshire Hoard among others. It was revived as trusts and foundations are more inclined to give to charitable trusts than to local authorities, and the Fundraising & Development team report how helpful it has been to be able to send out application letters to potential funders from the Museum Trust rather than from Birmingham City Council, BMAG’s parent institution (see section 1.4.1 below).

Re-invigorating the Friends

The Association of Friends of BMAG was founded in 1931. In the not too distant past, there had been some tension between the Friends and the museum. Also Birmingham City Council (BCC) had been undertaking all the administration for the Friends, which they believed it was costing them more than the Friends were contributing back to BMAG. Finally, the membership profile was very narrow, with most Friends aged 70 and up-wards.

BMAG therefore decided to bring in a new Chair of the Friends to broaden the base of the Friends and “*to shake it up*”. BMAG’s Director had a strong input into the selection of the new Chair, Deborah de Haes. Deborah has a strong background in the corporate sector in Birmingham, having worked at KMPG, and has increased the membership already from approximately 1,000 to 1,200, and taken over the administrative functions from BCC, via three members of paid staff

– funded directly by the Friends themselves (but still less than one full-time role in total).

Stakeholders and value

As with most of the projects in the evaluation, the most immediate beneficiary of the project is BMAG itself. Having a more diversified income base will help to ensure that the Museum is more sustainable in the long term, and this will ultimately deliver benefit to its visitors. But in the present report, we concentrate solely on the immediate benefits to BMAG of the project.

Birmingham Museum and Art Gallery

Increased income generation, from a wider range of sources, for a wider range of activities

The main driver behind the project is to increase income generation for the Museum and to widen the range of sources from which this is generated and, particularly in the case of trusts and foundations, to broaden what is funded (to include revenue funding). As the case study and the SROI analysis below shows, BMAG have been successful in achieving most of their aims in these areas. The one area that has so far not taken off is the new Individual Patrons scheme (see section 1.4.1 below).

Developing skills and capacity to better engage (corporate) funders with the museum

As someone who arrived at BMAG from outside the museums sector, Hollie was initially surprised at the lack of capacity and expertise in corporate fundraising. She believes that museums are less used to/ less professional with regard to this than the performing arts sector, in which she used to work at The Cheltenham Festival. However, all interviewees believe that great strides have been made in this regard.

BMAG now has around 10 corporate sponsors, most of whom are national and international companies with a local presence. They have had approximately corporate hires for around 60 events this year. As fundraising and development is about relationship building, BMAG look on corporate hirers as potential future sponsors. For instance, a big consultancy firm who book BMAG for their annual Christmas Party are currently in negotiations with the museum on a sponsorship agreement. The reality of relationship building has led BMAG to merge their lists of contacts for sponsorship with those for corporate hires, in order to ensure coherent communications and maximise the potential returns on this.

BMAG have also learnt that corporate sponsors want different outcomes from their involvement with the museum. Some corporates have very clearly defined

benefits, while others have more intangible benefits in mind. One example of the latter is Deutsche Bank, with whom BMAG are developing a long term relationship with, as the company is relatively new to Birmingham and are wanting to cement and build-up their presence in the city. The Bank was BMAG's first Corporate Patron, but the museum is also in talks with them about becoming a partner in an exhibition that would draw on the Bank's own (significant) art collection. However, this will take time to realise due to the difficulties posed by the long lead times for exhibitions. BMAG have had to learn that patience is required in turning initial leads into defined outputs with a cash or in-kind value.

But the museum has managed to raise some in-kind corporate sponsorship contributions. In particular, they benefited from pro bono legal work on the Staffordshire Hoard that the law firm estimated to be worth almost £17,000. In return, the firm had a private tour of the Hoard with BMAG's Director. This last example illustrates how Rita's role, and other senior positions, has been changing as a result of the project.

The Director's role has become much more external-facing; making new contacts and telling people about BMAG – a role that she enjoys and sees as only becoming more important. Rita notes that she previously had no real links with the local business community, but this has now changed (see below). She is also getting to know other external funders – trusts and foundations (e.g. Esmee Fairbairn). Although she has always had some contact with these funders, she has since been able to get into a closer dialogue with them than in the past. Before they had established the current fundraising team, BMAG had mainly approached the Heritage Lottery Fund for capital funding. With the new F&D team, the Museum now approaches trusts for revenue funding, alongside their efforts with corporate sponsors.

The roles in the SMT have also changed to a more outwards-facing orientation, particularly at events, where Jo and Hollie have supported them to improve their networking by briefing them in advance as to who is at the events. All of the SMT have subsequently realised the need to educate themselves much more before events.

However, the recognition of the importance of deploying senior museums staff (not just members of the SMT, but also individual curators) to deal with corporate clients on a similar level, has not always been as straightforward to put into practice. Some senior staff can sometimes find it hard to find the right register that really engages corporates when talking about the Museum and its collections. In part, this is related to the diversity of the collection (i.e. knowing what aspects to highlight) and knowing which element(s) of the BMAG 'brand' or offer to focus on

(see section 1.4.1 below). But it is also partly a skills issue. Again, the F&D team have helped here by preparing fact sheets in a short, snappy style to help senior staff giving presentations to corporate audiences.

Enhanced links to the local business community

The establishment of the F&D team and the development of the new corporate and Individual Patrons schemes means that BMAG has engaged with the local business community as never before. In this, Hollie's role has been vital. Ann Tonks, co-owner of upscale local restaurant Opus, explained that, before Hollie was in post, she had always wanted to open a dialogue with the Museum but did not know who to approach and had found the institution somewhat closed-off and introverted. Once Hollie came into post, dialogue on a daily basis has been much easier, as she provides a recognisable way into the organisation and understands businesses. Opus has since become a corporate sponsor of the Museum, though Ann still has frustrations regarding BMAG's ability to engage with the outside world, but recognises that much of this comes down to the Museum's current governance arrangements (see section 1.4.1 below).

Another pivotal factor in BMAG developing better relationships with the city's business community has been the influence of Ian Reeves. Importantly, Ian's involvement with BMAG pre-dates the Renaissance Capacity Building project, but he has had a significant influence on how the project has been implemented.

Ian is a retired senior executive with a corporate finance firm in Birmingham, and now a Freelance Consultant. He became involved in the BMAG Friends scheme 5-6 years ago through an acquaintance and first joined as a community member. However, he was dissatisfied with this role, "*not really knowing what I was there for*". He decided he needed to "*understand first what BMAG is and where it's going*". This led him to having conversations with Rita. He always felt that the Museum needed to relate more with the outside world and was therefore keen to help Hollie to engage with the local business community, and used his contacts from his professional life to introduce BMAG to key individuals and companies. In addition, he has worked to mentor/advise Hollie and the F&D team since their appointment, and continues to also support Rita and the SMT as a 'critical friend'.

An indication of the distance that BMAG has travelled in terms of their links into the business community is that they have become part of the Business Improvement District (BID) for the Colmore Business District in the centre of Birmingham. Being part of the BID should provide the ideal route/opportunity for the Museum to further engage with local businesses.

Capacity to take advantage of major opportunities (Staffordshire Hoard)

The discovery of the Staffordshire Hoard was a once in a generation opportunity for BMAG. The Museum moved swiftly to become the joint owners of the Hoard along with Stoke Museum, and to work closely with The British Museum on the research and conservation of the Hoard, Rita McLean feels that the fundraising capacity that the Museum had developed through the Renaissance project played a large part in the Museum being sufficiently equipped and confident to take on the scale of the challenge – as well as the opportunity – that the Hoard represents. This is because, with the exceptional asset of the Hoard, came some exceptional fundraising targets: £3.3m in four months. To-date, BMAG have been successful with all of their applications to trusts and foundations related to the Hoard and are set to achieve their target. The in-house F&D capacity developed by BMAG was particularly important in this instance given that there is no similar resource available at Stoke.

More fit-for-purpose Friends Scheme

Deborah de Haes, the new Chair of the Friends, was asked to be Chair on a number of occasions before agreeing to take the position in 2008. She only became convinced to take the role when she became aware of BMAG's 20-year masterplan for the building. This is because Deborah feels that this is a project of such scale that the Museum will not be able to undertake it on its own, and will instead need significant community involvement. Further, she was already aware that the coming years will be a difficult time for BMAG in terms of their public funding. She perceives that they needed more people to support them in the local constituency, in order to fight their cause with the Council about any potential funding cuts (as culture budgets are discretionary and therefore especially vulnerable).

Deborah's job is to bring the Friends scheme closer to the interests of the Museum itself, while also refreshing their offer and attracting a newer, younger membership. While the Friends are clearly not part of the Renaissance project, Deborah has worked quite closely with Hollie in developing her strategy in a number of areas, particularly streamlining some of the membership options and devising the new Patrons scheme. For instance, the Friends used to offer a business membership, but this has been withdrawn as Deborah has agreed with Hollie that the Friends will work only with individuals and BMAG will work with businesses.

Deborah also wants the Friends to significantly increase the contributions it makes to BMAG annually. At present, they contribute approximately £25,000 a year, but Deborah wants to ultimately more than treble this sum. This commitment to investing more in the Museum has already seen them take a more proactive

stance to fundraising than before and, for instance, the Friends had a separate fundraising campaign for the Hoard. But Deborah also feels that the Friends are capable of taking more investment risks than at present.

In particular, the Friends have an investment fund of approximately £0.5m at present, from which the Friends have only ever utilised the income that it generates. The Chair would like to see this capital work harder and she, together with the Trustees, are currently preparing a plan to split the investment fund into two: one half will continue to generate interest to provide income, the other will be invested to deliver capital gains. The Friends are thus keen to see whether it is possible to replicate the US model of generating income for cultural institutions from the large investment funds of their Friends groups.

Lastly, Deborah also wants the Friends to be more pro-active in their acquisitions, but again, making sure that this is much more closely integrated with the Museum's acquisitions policy. Previously there had been no control or line of communication between the Friends and BMAG regarding acquisitions. Deborah and Rita have therefore agreed strict protocols that that nothing goes to the Friends Acquisitions Committee without Rita seeing it first. At the same time, Deborah would like the Friends to be more involved in acquisitions, as she feels that it would be a good selling point for the Patrons scheme as it gives people an opportunity to specify what they would like to support.

Challenges, successes and legacy

Challenges

Brand Management

In becoming much more focused on raising money from a wider range of sources than previously, deciding on what the message needs to be that is communicated to each potential sponsor or funder becomes more complicated. David Powell, the Fundraising & Development Officer described the issue of branding BMAG as “a double-edged sword”. On the one hand, BMAG needs to be represented as a community-involved local/regional museum when applying to many trusts and foundations. On the other hand, it needs to be a nationally important, “glamorous” art gallery when appealing to corporates. The brand strategy therefore has to be based almost on managing a number of ‘mini-brands’ to reflect these different characteristics.

Corporate fundraising outside London

The F&D team do believe that corporate fundraising outside London is more difficult, although by no means impossible. As most headquarters of large companies are based in London or the surrounding South East, these companies' sites in other cities tend to have smaller budgets for hospitality. Similarly, although

there are some big regional trusts in the West Midlands, like Cadbury, most are again in London and only become interested if BMAG's exhibits are of national importance. In summary, most of the networks for tapping into both large-scale corporate or trust and foundation money, are concentrated in London and the South East. There is a small upside here though, in that there is also arguably less competition for this type of money outside London.

What the F&D team are keen to stress more is that BMAG should not be nervous about asking people/institutions outside Birmingham/the region to get involved – so long as there is some apparent link to the city. The importance here is to see BMAG not only as a local museum; BMAG need to see themselves as a national museum, then others will too. This is a view that is shared by existing corporate sponsors of BMAG (e.g. Opus), who are keen for the organisation to really promote their (inter)national credentials more strongly.

Client Management skills and procedures

While the involvement of senior museum staff in all forms of corporate income generation is vital, and has progressed significantly through the Capacity Building project, the Fundraising & Development Manager still has responsibility for all of these client relationships. If senior staff could become responsible for managing their own 'client' relationships, this would free-up some of Hollie's time to do more development work. However, at this stage, senior staff do not have the requisite client handling/account management skills to do this. There would also need to be further changes to systems and processes to make this happen. For instance, if other staff were to be more involved in managing a small set of their own client relationships, they would need access to the corporate funders' database (so that they can view what their funders have been invited to, what they came to, how much they donate, and so on). At the moment, while the SMT are aware of the database, they do not have access to it. Client relationship management at BMAG still needs to be developed therefore and, as Hollie stated, *"if you go asking, you need to have the support to look after the client"*. At the moment, many staff are still not at the stage where they can do this.

New Individual Patrons Scheme

Of all the new ideas tried by the F&D, the new Individual Patrons scheme is the only element yet to show signs of success. The idea behind it was that neither the existing Friends scheme nor the new Corporate Patrons scheme catered for high net worth individuals. Hollie and the Chair of the Friends therefore together came up with a new Patrons scheme. The new scheme has four levels, starting at £110 and rising through to £1,500 per annum. The different levels offer progressively better access to facilities/ curators/ the Director, free drinks receptions, networking events, etc. The re-launch of the scheme – which replaced a previous, much

cheaper individual Patrons scheme run by the Friends – caused some friction with existing Patrons, so they have now been able to stay on after the re-launch for the same price.

Both Hollie, who is the Coordinator of the 'new' Patrons (despite being paid by BMAG), and Deborah, the Chair of the Friends, feel that they need to work more on the Patrons offer and provide more events throughout year for them. They also feel that they require more personal attention, in order to hook into their particular interests, and that they have not yet been able to find the right way to do this.

Relationship with parent body

Of all the challenges that BMAG have experienced through the project, the most commonly referred to across the seven interviewees from both BMAG and their stakeholders, was their relationship with Birmingham City Council.

Being local authority-owned means that there is a crucial lack of autonomy in a number of areas which places serious constraints on the ability of BMAG to pursue their income generating strategies, particularly with regard to corporate sponsorship/patronage and hire. In particular:

- Marketing has to go through BCC – BMAG cannot have a separate marketing identity nor a separate logo. This means that the F&D team is not in control of how to promote BMAG; their remit appears, instead, to be to promote BCC. The Council stipulates that their own logo should be on all documents and this can be counter-productive to fundraising (which is why the Museum Trust was revived to get around this), but BCC does not appear to understand this problem. An unusual and rare exception to this is that BMAG has its own website and web team, and therefore has more control in its digital marketing, though they still have to utilise the BCC logo.
- PR – the same situation exists with PR, which has to be done through the Council's own in-house PR team. As BMAG only has a fraction of the budget of other Council departments, such as housing, the Museum is never going to be at the top of their agenda.

Marketing and PR have a strong overlap with fundraising. As with the Museum Trust, in other areas BMAG have had to essentially develop 'workarounds' to the problems that not having control over your own communications creates. There are two further areas where BMAG's relationship with BBC is challenging.

- Catering – in trying to expand and improve the corporate hospitality offer, catering is a key ingredient. Again, due to being part of BCC, BMAG are contractually obliged to use the catering company that the rest of the Council

uses. This is not of the highest professional standard and it would be beneficial to have a better offer with which to attract sponsors. Further, when Opus Restaurant offered some pro bono training for the Council's catering company – to help them improve standards – they refused: “they do not have a business frame of mind... it was like trying to get through a brick wall” (Ann Tonks).

- Finance – there is no in-house Museum Finance Director; all finances are managed at the local authority level. The Director feels that having their own Finance Director would improve the management of the organisation as it would allow her and the SMT to be more in touch with how they are performing on a day-to-day basis. Also, financial and HR procedures within BCC are very strict; particularly in difficult times like the present. The local authority is apt to use a “blunt instrument to stop spending”. A small example is that they do not understand the need of having to ‘bond’ with potential corporate sponsors and, for instance, take them out for a coffee. As the Council has been planning for major funding cuts, the financial controls have been getting tighter and there has been even less flexibility in which to operate. Conversely, Rita feels that there is a greater need for more flexibility at present, in order to make changes to cope with the approaching cuts [BMAG's financial settlement had still to be announced at the time of writing].

The experience of BMAG in undertaking the Capacity Building project has brought matters to a head concerning their relationship with the Council. With the backing of the Trustees, BMAG have therefore prepared a Cabinet Paper for the Council to investigate the options of moving to Trust status. This has been given the green light, though the precise form that this might take will also be investigated – e.g. BMAG as a standalone Museums Trust, or as part of a wider Birmingham Culture Trust including all BCC funded culture organisations and (possibly) all libraries.

Success factors

The importance of external knowledge and connections

Across the various elements of the Capacity Building project, the role played by external individuals, organisations and stakeholders in supporting the aims of the project is striking. This takes a number of different forms:

- Access to new networks – Ian Reeves has played an important role in brokering relationships with the business community, this is a much more efficient and effective route than cold calling to attempt to tap into these networks.
- Access to specialist knowledge – BMAG has taken full advantage of a range of organisations that have provided specialist training and advice on the areas covered by the Capacity Building project, including the Institute of Directors,

Arts & Business and the Museums Association (see section 1.2 above). In addition, BMAG could only commence the project by 'buying-in' specialist fundraising knowledge from outside when appointing the Fundraising & Development Manager.

- Strong external challenge – BMAG has a group of 'critical friends' that it consults on a regular basis, this includes Ian Reeves, Deborah de Haes, some of the corporate sponsors, and the Public Picture Fund. While all are committed to a successful BMAG, all are not afraid to "give it a shove sometimes" (Rita McLean). Furthermore, Rita also reported that having a direct monitoring relationship with MLA had also challenged the Museum and made them really consider whether they were making progress in the right direction.

Director level involvement and leadership

One of the reasons why the Renaissance project has been able to catalyse so much change is the strong involvement and backing from BMAG's Director. While there has sometimes been a difficulty with Rita becoming "bogged down" with other operational work, and finding it difficult to set aside time for fundraising events, this has become easier as the realisation of the importance of external-facing activities has increased. It has also been helped by the Fundraising & Development Manager having direct access to the Director, as this has speeded-up administration processes and also given Hollie the chance to book tours with Rita for potential sponsors easily.

The Staffordshire Hoard

The Staffordshire Hoard was a major opportunity and a major challenge, as it "put the organisation in the spotlight" (Ian Reeves). It has been extremely beneficial for BMAG's media profile – they appeared in National Geographic, for instance – and it has opened-up possibilities for new partnerships (e.g. with The British Museum). One therefore has to be careful as to how to disentangle the effects of the Renaissance project from those related to the Staffordshire Hoard. However, from our interviews, it seems that there has been a positive feedback effect:

- the Building Capacity project put in place the structure and resources that enabled BMAG to be able to capitalise on the Hoard in the first instance; and then
- the status of the Hoard meant that BMAG could attract the attention of major trusts, foundations, donors and partners far quicker than would have been possible without it.

Further, the experience of achieving success in fundraising for the Hoard and in operating at a national level also increased the F&D team's (and the SMT's) confidence in their fundraising abilities.

Dissemination and transferability

A key element of the project as far as MLA is concerned, is that the knowledge learned by BMAG through the project gets disseminated more widely. The F&D team report that MLA is keen to influence this process therefore BMAG have been waiting for a steer from them. In the meantime, a variety of ad hoc events have been undertaken:

- Rita McLean has presented at a 'resilience workshop' organised by Museum Policy West Midlands,
- Presentation has been given to the national Touring Exhibitions Group on developing your fundraising strategy
- BMAG have participated in a Museums Association advocacy workshop
- The F&D team have given two internal fundraising presentations full BMAG staff meetings
- The F&D team have also thought about the local Arts & Business team as a conduit for dissemination, although nothing formal has yet been decided.

While they are keen to disseminate the findings, they are also keen to avoid being seen as too patronising. Further, the direct transferability of the findings from the project related to income generation from corporates is likely to be limited to a relatively small number of museums in large urban centres with outstanding collections.

In other contexts, the F&D team feel that a strategy focused on corporates would most likely not be appropriate. The aim instead would then be to approach individual sponsors such as friends/ patrons, and possibly also local businesses, depending on the collection.

Legacy

The intention is to retain the two F&D posts beyond the end of the project and to mainstream these into the core budget. The requirement will be that they cover at least 50% of their salary costs.

Cost benefit analysis

Stakeholders

As discussed above, the only stakeholders analysed in the research is the museum itself.

Inputs

- £33,134 Renaissance funding and £37,364 Birmingham City Council funding
- Cash expenditure on:
- two new F&D posts, £65,985
- marketing communications costs (e.g. brochures, photography), £4,513
- Staff time donated by other BMAG staff, valued at £22,561

Outputs

- There are a range of different outputs from the project.
- F&D team established (2 new posts)
- Funders' database created
- Fundraising strategy developed – including a number of dedicated development activities (7 sessions, totalling 16 hours, covering the following: Critical Friends events x2 (run by F&D team); Arts & Business seminars (on tax effective giving, accounts for charities)/Action Planning training on major donors; Museums Association training on corporate fundraising; Institute of Directors in-kind mentor sessions for the Fundraising & Development Manager; Freelance consultant advice session to senior BMAG team; Advice session from the Fundraising Manager at the Natural History Museum)
- Review of catering facilities and services undertaken
- Review of corporate hire facilities and services undertaken
- Marketing and brand strategy development undertaken
- Board development undertaken – including a development session given by local accountants to BMAG Development Trustees re liabilities and legal responsibilities of Charity Trustees

Outcomes

- The outcomes are as described in detail in section 2.6.3 above and summarised in Impact Map pt 1 below.

Impact Map pt 1: stakeholders to outcomes

Project Capacity Building			
Stakeholders	Inputs	Outputs	Outcomes
Birmingham Museum & Art Gallery	1) £33,134 Renaissance funding	- F&D team established (2 new posts)	Increased income generation, from a wider range of sources, for a wider range of activities
	2) £37,364 Birmingham City Council funding	- Funders database created	
	Cash expenditure on: - 2 new F&D posts, £65,985 - marketing communications costs (e.g. brochures, photography), £4,513	- Fundraising strategy developed	Developing skills and capacity to better engage (corporate) funders with the museum
		- Review of catering facilities and services undertaken	Enhanced links to the local business
		- Marketing & brand strategy development undertaken	Capacity to take advantage of major opportunities
	- Review of corporate hire facilities and services undertaken	- Board development undertaken	More fit-for-purpose Friends scheme

Cost-benefit analysis

The cost benefit calculation compares the £93,059 total investment in the project in 2009/10, against the £340,390 direct financial return in terms of additional fundraised income during this year and additional profits from corporate hires in 2009/10 and 2010/11. These income sources represent the primary benefits of the project and are already expressed in financial terms enabling a straightforward comparison.

The project therefore creates £3.66 of benefits for every £1 invested.

Research sources

- Financial and project information from Jo Smith, BMAG
- Interviews with:
 - Rita McLean, Head of Museums & Heritage Services, BMAG
 - Jo Smith, Head of Projects & Development, BMAG
 - Hollie Smith-Charles, Fundraising and Development Manager, BMAG
 - David Powell, Fundraising and Development Officer, BMAG
 - Ian Reeves, Freelance Consultant, Patron of BMAG,
 - Ann Tonks, Co-Director of Opus Restaurant
 - Deborah de Haes, Chair of the Friends of BMAG

15 Strategic Service Planning and Mainstreaming Income Generation at Russell-Cotes Art Gallery and Museum

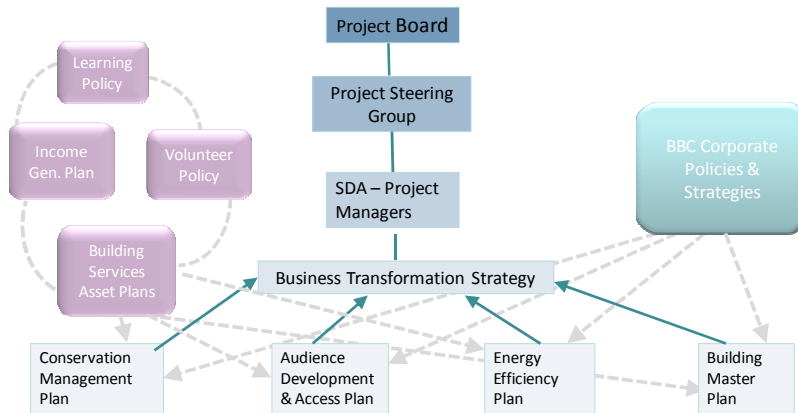
Aims and activities

Russell-Cotes Art Gallery and Museum is a medium sized venue in Bournemouth that attracts 85,000 to 100,000 visitors per year. It is based on the personal collection of Sir Merton and Lady Russell-Cotes and features artefacts from their world travels. An accredited museum, its collection is of international status and reflects the Victorian fascination with world cultures, as well as contemporary taste in art. The small team of 15 permanent staff is supported by volunteers and some further temporary, mostly specialist, staff funded through Renaissance.

Like many museums, Russell-Cotes is highly dependent on grant funding from its local authority (and from Renaissance – in total these sources account for over 90% of the museum's income). Faced by impending cuts, it needs to find new ways to operate more sustainably. The Renaissance-funded Strategic Service Planning project therefore aims to review and transform all aspects of museum operations, with an emphasis on economic sustainability but also including aspects of environmental and social sustainability. To give a sense of the ambitious scope of the project, it extends to considering the appropriateness of, for instance, introducing a new governance structure (for example, operating as a social enterprise) or admissions fees – as well as options for restructuring the staff team. The management team is working with consultants to implement the project by preparing a number of new Plans and Policies for the museum, all of which will feed into the overarching Business Transformation Strategy (see diagram).

The Mainstreaming Income Generation project sits alongside the Strategic Service Planning project. It seeks to improve the museum's economic performance by testing and introducing new income generation initiatives. At the time of writing, a number of ideas have been identified, some of which are implemented.

Strategic Service Planning project schema



Source: Stuart Davies, consultant to Russell Cotes

Examples of the work underway at the Russell-Cotes through these two projects are profiled below. Much of the work undertaken within the Strategic Service Planning project cannot be shared at the time of writing, as it has not been signed off and it has possible implications for existing staff at the museum. Given the volume of activity underway at the museum, senior staff also face time pressures which impacted their ability to contribute in detail to this case study.

Retail operations

Russell-Cotes is continuing to improve the on-site shop, re-positioning it so that visitors pass through it when leaving the museum, and stocking the shop with products which are relevant to both the museum and the history of the local area. The result of the improvements is that income from the shop has increased from £39,000 in 2006/07 to £48,000 in 2009/10 despite the recession from 2008 on.

The new Art on Demand scheme allows people to buy images from the collection as cards, prints and posters – in a variety of sizes – via a dedicated website linked to the main Russell-Cotes website.

Donations

While admission to the museum is currently free, Russell-Cotes aims to generate more income from visitors who are able to contribute to the museum's costs. To help achieve this, donation boxes have been installed in prominent places with a recommended £3 contribution per visitor. This simple intervention has increased the total yield from donations from around £5,000 in 2006, to now over £20,000.

There is currently no Friends scheme in place at the museum. Given that the Bournemouth area contains some very affluent households, it seems possible that a Friends or Membership scheme could prove successful. The Audience Development Plan commissioned through the Strategic Service Planning project

will among other issues look at the scope to more effectively tap into higher earning groups.

Sale of local artworks

Russell-Cotes has discovered that one effective way of generating income, given Bournemouth's numerous artists, is exhibiting and selling art that is produced locally. Russell-Cotes takes a 45% commission on artworks which are sold while on display at the museum, which is comparable to the arrangement at commercial art galleries.

Radical alternatives

As Lady Russell-Cotes gave the museum to the people of Bournemouth, admission fees are an option that the museum is reluctant to embrace. Should it be decided to introduce admission fees, there would be scope for a tiered or banded admissions fee system where low income groups did not pay or paid less.

Sales of works from the collection may offer scope to raise funds but is likewise not a preferred route, for all of the usual reasons. If it was decided to take forwards this idea, the museum would focus on selling non-core artefacts. Much of the collection was built up following the death of Merton and Annie Russell-Cotes, and therefore reflects the tastes of subsequent curators rather than the museum's founders.

Conservation and environmental sustainability

Russell-Cotes faces a number of challenges relating to its building. Due its sea front location, the museum is particularly susceptible to water damage resulting from storms – and local storms appear to be on the increase due to climate change. A new roof is desirable in order to better protect the museum. As a large old building, significant energy is consumed by the museum's outdated heating, lighting and air-conditioning systems. The Energy Efficiency Plan commissioned through the Strategic Service Planning project will recommend how to reduce energy consumption in order to create cost savings and to improve the museum's carbon footprint.

Stakeholders and value

Given the focus on generating additional revenue, the key stakeholder for the Renaissance projects is the museum itself. As the principal funder, Bournemouth Borough Council can also be regarded as a stakeholder – any increases in earned income for the museum will reduce its financial dependence on the Council. Ultimately, Russell-Cotes' users will benefit from the improved operation of the museum.

In terms of the value delivered by the project interventions, some ideas are still to be fully formed or implemented and so it is too early to say what the full value and impact of the projects is likely to be. However, those interventions which have already proven to be effective include the improved donation boxes and the sale of local artworks.

Extract from the Russell-Cotes Art on Demand website

FEATURED EXHIBITIONS

Food for thought
3 Dec 2010 - 30 Apr 2011

Exploring some of the pleasures and pains of food - catching and growing, cooking and eating, feast and famine.

VIEW ART



POPULAR WORKS

Explore the Russell-cotes collection

Discover beautiful art for your home or office

EXPLORE COLLECTION



Challenges, successes and legacy

The Strategic Service Planning and Mainstreaming Income Generation projects are highly complex and ambitious, seeking to create change at several levels and timescales – ranging from the quick introduction of new earned income ventures to a longer term transition to a new structure and operating model. It will be some years before the impact of these two projects can be judged. The criteria by which they might be judged are the aim and objectives of the Business Transformation Strategy. These are to:

“... Transform the museum into an organisation which is:

- *Fit-for-purpose*
- *Affordable*
- *Efficient and value-for-money*
- *Sustainable, focussing on delivering the triple-bottom line*
- *Committed to excellence*

- *Confident and inspiring*
- *Distinctive, vibrant and engaging*
- *Audience focused – exceeds expectation*
- *Valued and used by the Borough's residents (NI 10)*
- *A 'must see' attraction in Bournemouth*
- *Entrepreneurial, dynamic and business focused*
- *Rooted in museological best practice and innovation"*

The Russell-Cotes management team feels that a key challenge at the outset of the projects was to develop a more entrepreneurial and commercial mindset among staff. The fact that 92% of the museum's income comes from public sources had reduced the incentive to focus on earned income. To address this, a series of facilitated workshops were held for staff, providing an opportunity to reflect on current practice and how the museum could become more economically sustainable. The management team feels that these workshops have been a success – and this perhaps provides one indication that that a fundamental transformation of Russell-Cotes operations is indeed possible.

Cost benefit analysis

This section details as many inputs and outputs of the projects as possible; while the cost benefit calculation focuses on the income generating ventures which are already in place and providing a return. A data return was not received and therefore no full cost-benefit analysis could be carried out for this project.

Inputs

The inputs for the two projects are Renaissance project funding, plus the time commitment from Russell-Cotes' staff.

- Renaissance Funding £131,624;
- Staff time not specified (but likely to be substantial).

Outputs

The outputs for the two projects are many and diverse, but they can be grouped as:

- Additional income secured through new or enhanced earned income initiatives (Art on Demand, sales of local artworks, improvements to the museum shop);

- Additional income secured through new or enhanced donated income initiatives (the donation boxes, plus potentially in future a Friends and Membership scheme);
- New Business Transformation Strategy, informed by a comprehensive suite of new plans, policies and strategies.

Data is only available for the initiatives that were introduced earliest in the process. All have successfully secured more income:

- Donation box income: up from £4,898 in 2006 to £20,193 in 2009;
- Income from sales of local artworks: up from £3,477 in 2006 to £8,906 in 2009;
- Museum shop income: up from £39,260 in 2006 to £48,064 in 2009.

Outcomes

Again the specific outcomes of the two projects are many and diverse, but they can be grouped as:

- Improved financial sustainability with reduced dependence on public sector funding;
- Enhanced operating model leading to long term viability with associated economic, environmental and social benefits.

Impact Map part 1: stakeholders to outcomes

Project Strategic Service Planning and Mainstreaming Income Generation, at Russell-Cotes			
Stakeholders	Inputs	Outputs	Outcomes
Russell-Cotes museum; Bournemouth Borough Council	Renaissance Funding £131,624; XXX hours of management time equivalent to £XXXX	Additional income secured through new or enhanced earned income initiatives (Art on Demand etc.)	Improved financial sustainability with reduced dependence on public sector funding
		Additional income secured through new or enhanced donated income initiatives (donation boxes, etc.)	
		New Business Transformation Strategy, informed by a comprehensive suite of new plans, policies and strategies.	Enhanced operating model leading to long term viability with associated economic, environmental and social benefits.

Research sources

- Interviews with senior management team at the Russell-Cotes:
 - Chris Morgan, Service and Strategy Manager, Heritage and Cultural Support Division, Bournemouth Borough Council
 - Sue Hayward, Heritage Manager, Bournemouth Borough Council
- Internal museum reporting documents relating to project finances and initiatives;
- Russell-Cotes web-site.

16 World Class Volunteering, West Midlands

Introduction and aims

World Class Volunteering is a project led by the Ironbridge Gorge Museum Trust and co-delivered by Stoke-on-Trent Museums Service. Both Hub museums had applied for funding for volunteering projects in the current business planning period (2009-11). They were asked to work together as well as providing support to museums across the West Midlands. More than that, the project has resulted in sharing best practice on a national level.

The project started in September 2009 with the recruitment of the Volunteer Coordinator Lucy Andrews-Manion and two assistants. One of them, Andrew Watts, is based in Stoke-on-Trent and covers the Stoke-on-Trent and Staffordshire area, whereas the Ironbridge-based effort is focused on museums in the rest of the West Midlands region.

Historically, both the Ironbridge Gorge Museum Trust (managing 10 museums and two other sites in the area) and Stoke-on-Trent Museums Service (made up of four museums) have always worked with volunteers. However, they have previously had a fairly ad-hoc approach to recruitment, and have also entirely focused their volunteer work on the needs of the museums. A greater focus on the volunteers themselves, and thus the introduction of a more socially sustainable approach to volunteering, was one of the aspirations of this Renaissance-funded project.

The key aims of the Renaissance-funded project are:

- To increase the number of volunteers, in order to expand and improve the visitor offer at museum sites (e.g. free guided tours, major events)
- To improve the volunteering experience through better volunteer management, training and support
- To develop new volunteering roles and locations for placements, to cover different museum sites (e.g. Jackfield Tile Museum in Ironbridge) and different departments (e.g. office based roles in marketing, education or curatorial departments)
- To widen the volunteer profile, in particular in terms of age to ensure volunteer succession
- To support other museums in the region to improve on aspects of volunteer management and recruitment

Project activities

One of the key aims of the project at Ironbridge was to establish a Volunteer Centre on the Blists Hill Victorian Town site. The site offers re-enactment of a typical East Shropshire Victorian Town in the 1900s and has recently benefitted from a £12m re-development funded by the RDA Advantage West Midlands and ERDF funding. The site is the most important Ironbridge museum site with regards to the use of volunteers. £30,000 from the World Class Volunteering project was used to refurbish the former café into a Volunteer Centre. It now provides a meeting and socialising space for volunteers as well as the wider community. Other key project activities included:

- Development of a toolkit to provide guidance for museums on volunteer management, including a volunteer policy and checklists. This toolkit is aimed to help Ironbridge and other museums to develop a more volunteer-focused approach.
- Development of other marketing and promotion materials, e.g. postcards for recruiting volunteers (“Be Part of Your History”) and a volunteer newsletter
- Training of museum staff and volunteers

Volunteer recruitment, support and development

A key part of the project in both Hub museums was to improve the volunteer recruitment and management process, enhancing the experience of the volunteers and improving service delivery. A system was put in place that allowed the assessment of the needs of volunteers and matching them to the needs of the museum sites. This includes drawing up role descriptions for all volunteer opportunities. Once a volunteer submits an initial application form that outlines their general interests and skills, a suitable selection of role descriptions is made available to them. During the course of a follow-up conversation/interview these potential roles are discussed or the Volunteer Coordinator/Volunteer Assistants may suggest an alternative role that better matches the volunteer's interests and skills. Each volunteer period of work starts with a half-day induction with a member of staff who also becomes the volunteer's “mentor” for the initial period of their engagement.

Volunteers are also offered training, either specific to their role (e.g. Health and Safety at events) or to develop accredited skills (e.g. Welcome Host Training, Museum Guide course).

A wider range of roles

Using such a tailored approach to recruitment and working closely with the museums have resulted in an increased range of volunteer roles. In Ironbridge, volunteering roles traditionally included demonstrations (e.g. working in costumes)

at the Blists Hill site, with a smaller number of volunteers running and maintaining the steam engines onsite, as well as working as guides or helping with gardening. Since the start of the Renaissance-funded project, they have become involved in office-based roles, or have taken on specific roles in the delivery of big events at Blists Hill (e.g. Christmas and Halloween).

Similarly, in the Stoke-on-Trent museum sites, volunteers are now offered a variety of roles ranging from administrative (including marketing and web development roles) via information management tasks (such as digitisation of photographs or cataloguing or museum objects) to public-facing roles (e.g. education programme assistance, events stewarding) and practical tasks (including gardening, litter picking, catering support and industrial exhibits maintenance).

Moving beyond 'traditional' museum volunteers

Another key objective of the project was to widen the profile of volunteers and to move beyond the 'traditional' museum volunteers. In particular in Ironbridge, efforts were made to recruit younger volunteers who would help ensure succession of the existing older volunteer base. In addition, both Hub museums widened out their volunteer offer to groups that they had never worked with before.

These "new" volunteers include individuals from hard-to-reach groups. Ironbridge's current volunteer pool now comprises a small number of people who are not in education, employment or training (NEETs) or who are long-term unemployed. Lucy works with training companies (e.g. Shropshire County Training) to recruit such volunteers for placements. So far a 58 year-old has completed a volunteer placement and a further 5 or 6 NEETs are waiting to be placed with the museums. Furthermore, 18 learning disabled adults volunteered across the Stoke-on-Trent Museums Service. In particular they helped on reception and got involved in landscaping jobs. Andrew now works with a local adult training centre to recruit further individuals from this group.

Both museums – but in particular the Ironbridge Gorge Museum Trust – have also worked with one-off or project-specific volunteer groups. In Ironbridge, Lucy has built relationships with several big companies and organisations that are based in the local area and who have sent volunteer teams to help with a specific project. Examples of this are:

- Capgemini: 75 employees came for a day before Christmas to put up the Christmas decorations at the Blists Hill site. On a different occasion, they helped to move the costume storage to its new location. In addition to such

'practical' tasks, the Capgemini Board of Trustees will spend half a day working with the museum to help develop their business plan.

- Ricoh: a team of approximately 20 staff are coming 3-4 times a year to help on a bigger project (e.g. transformed a garden area on the Blists Hill site)
- Telford College for Arts and Technology (TCAT) – the college offers courses in events management, tourism etc. and works with Ironbridge in a variety of ways, inc. students supporting big events held at the Ironbridge museum sites. Students are recruited through a talk from Lucy at the College, following which they receive training one week before the event and during the event students are moved around different activities to give them a flavour of different roles.
- School placements: Andrew has built relationships with some schools and has started developing a new format for placements. Unlike before – where students tended to come in for a week and were given 'a general overview' of museum tasks (requiring high levels of supervision and management on behalf of the museum staff) – they are now given a specific task, which they might work on for one day a week over a longer period of time, that enables students to really explore a particular museum's function.

Developing regional capacity for better practice in volunteer recruitment and management

One of the project targets for Ironbridge Gorge Museums was to work with at least five regional museums to improve their volunteering management and service. Lucy carried out intensive work with five museums (inc. Aston Manor Road Transport Museum, the Wedgwood Museum, The Queen's Own Hussars Museum, The Orthopaedic Experience and St. Georges Medical Museums) which needed help and a tailored approach to working with volunteers.

In addition, she worked with a total of 69 museums and heritage organisations across the region to provide help and guidance, e.g. in using the volunteer toolkit, writing a volunteer policy, or conducting a needs assessment. She also works with museums that are aiming for Accreditation to help them meet the human resources criteria.

Similarly, Andrew is working with museums in the Staffordshire area towards regularising the volunteering workforce and improving their recruitment. A survey carried out among organisations in the county revealed that many of them were not aware of the potential benefits, as well as the demands of, volunteering. Andrew explains:

"A lot of museums, especially the really small ones, hadn't realised that volunteering has moved on a fair bit; that you can work with younger volunteers; there's been a perception that younger people won't volunteer."

To address this issue, Andrew is planning to undertake a county-wide recruitment campaign.

The work carried out by the Ironbridge Gorge Museum Trust enables sharing tools and good practice not only at regional but also national level. For instance, articles have appeared in the national AIM Bulletin or in the Renaissance News and the project will also be featured at the MA Conference 2011.

Stakeholders and value

There are a number of beneficiary groups of this project. The key stakeholders are the volunteers themselves and the two lead Hub museums, however, other museums and non-museum sites in the region, Stoke-on-Trent Council, and the wider community also benefit from the project. The value of the project to each group of stakeholders is described in turn below.

Volunteers

Better utilisation of skills and aspirations

Volunteers benefit in a variety of ways from the additional support and management. In particular, the tailored approach to volunteer recruitment and placements ensures that volunteers' existing skills are aptly utilised and developed.

The volunteer coordinators found that some volunteers have quite defined ideas about what they would like to get out of their volunteering, as well as the kind of activities they would like to be engaged in. A process, as implemented in Ironbridge and Stoke-on-Trent, that attempts to closely match the volunteers' skills and ambitions to a fitting role helps to satisfy these expectations. In some cases 'matching' also means to be realistic about what is possible. For instance, the project reported of many volunteers imagining that they will be primarily handling precious objects while this did not conform with the realities of the museums. Being upfront about this and trying to find alternative roles that match their ideas, helped to avoid disappointment at a later stage and made for better volunteer experiences.

More often, though, volunteers are unsure about what they could be doing, given their existing skills and interests, and the process allows for identifying the ideal role for each volunteer. In cases where no fitting role exists, efforts are made to

create such a role, or the volunteer is put on a waiting list – rather than recruiting them for an unsuitable task.

Skills development and entry into the labour market

In addition to using existing skills in the best possible way, skills development and experience are key outcomes for volunteers, especially younger ones.

While volunteering has always been a way of getting into the heritage and museums professions, Andrew feels that it is now even more important than before as most jobs require that the prospective candidate can demonstrate relevant work experience. Since the start of the project he has worked with a number of recent graduates, who also benefit from the job references that he is able to provide for them based on their volunteering experience. For instance, two recent graduates who gained volunteering experience working on the Staffordshire Hoard were able to convert this experience and references into a job within the Stoke-on-Trent Museums Service.

Lucy Andrews-Manion also reports that younger volunteers in Ironbridge are encouraged to move around different volunteer roles and sites to gain a wide range of experiences. This group of younger volunteers would also benefit from the training offered, although the uptake of this offer has been slow so far at the Ironbridge Gorge Museums sites. This has been more popular in Stoke-on-Trent. For instance, several volunteers went through a Museum Guide course and a smaller number took part in the 15 credit course “Basic introduction to working in heritage sector” which was co-delivered by Stoke-on-Trent Museum Service and Staffordshire University.

CSR commitment to the community

While skills development is the primary motivation for formal school and college placements as well as younger volunteers, this is only one of the reasons why some of the larger companies get involved. Rebecca Plant, PA to Simon Short, CTO at Capgemini, explains that the company's involvement grew out of their internal sustainability strategy:

“We wanted to make a contribution to the community we work in. This is even more important as many of our employees don't live in the Telford area. Ironbridge Gorge Museum Trust is such a well-known organisation and at the heart of the community that we work in.”

As part of Capgemini's sustainability strategy, staff are actively encouraged to get involved and to champion their own volunteering projects. The offer from the Ironbridge Gorge Museums has proven to be very distinctive for Capgemini. In addition to the museum's firm community roots, they find the available variety of volunteering tasks and formats very appealing. Employees feel that their skills and talents are being used in a genuine way, as compared to some of the more 'artificial' external teambuilding activities that they have been involved with previously. Many staff gain a sense of achievement from the volunteering as they see the impact their work has on the Museum, while also providing a fun, out-of-office experience, and the added opportunity to network and spend time with colleagues.

As a recognition of the success of Ironbridge Gorge Museum Trust's work with corporate volunteers, and Capgemini in particular, they were awarded the Arts and Business People Award.

Lead Hub museums

A wider, more sustainable volunteer base

Attracting more diverse groups of volunteers is an important factor for museums in view of making their volunteer workforce more sustainable. In Ironbridge, succession was a real concern with more than two thirds of the volunteers aged 65 years and above. Many of these volunteers had been engaged for decades and were carrying crucial knowledge – some of which staff did not have either (e.g. maintenance of steam engines). The World Class Volunteering project has resulted in a significant change in the volunteer demographics, in particular with regards to their age profile.

In addition, recruiting volunteers from a variety of backgrounds and sources also ensures a greater pool of talent to choose from. For example, building on the structured, one-off team events, Capgemini now advertises all of the Ironbridge Gorge Museums' volunteering opportunities internally. This is enabling the museum to access a new database of 2,500 volunteers – a number of which have returned already to the site individually, and there is the potential to develop them into more regular volunteers for the museum sites.

Moreover, bringing volunteers from different backgrounds together in museums is also a way of increasing social cohesion. Anna Brennan, Deputy CEO of the Ironbridge Gorge Museum Trust, feels that – more so than other public institutions – museums appeal to a very wide range of people and this is true for both museum visitors and volunteers: 'our volunteers are from all walks of life' and volunteering projects in museums such as World Class Volunteering '*can bring together people from different background or age who wouldn't usually mix.*'

Adding capacity and new ideas

Volunteers have a lot of valuable skills and/or time to offer to the museums. Indeed, one of the main benefits of working with volunteers for the lead hub museums is of an economic nature: an increased capacity of the museums and the ability to maintain a higher level of activity (e.g. offering guided tours), thus improving the visitor experience which may lead to a series of other financial benefits for the museums as discussed in the literature review.

Both Ironbridge Gorge Museums and Stoke-on-Trent Museums Service have seen a significant increase in volunteer numbers since the start of the project which has enabled the museums to complete a range of tasks that otherwise would not have been undertaken. In addition, Anna Brennand feels that volunteers are a driver of innovation and change in the museums by bringing in new ideas and impetuses.

Despite these benefits to the organisations, there was some resistance among staff toward working with volunteers, in particular among staff who did not have such prior experience, and who perceived volunteers as a potential threat to their own jobs. Both volunteer coordinators felt that there continues to be 'a PR job' to reassure people that volunteers are not about replacing existing staff, but rather about enhancing staff's work as well as enhancing the museum service overall.

One factor was particularly influential in helping to turn around Stoke-on-Trent staff's preconceptions. The massive increase in visitor interest due to the exhibition of pieces from the Staffordshire Hoard highlighted the complementary value of volunteers. The influx of 32,000 visitors attending in the first couple of weeks could only be managed with the help of volunteers and this has significantly raised their status with, and the appreciation of, their value by, paid staff.

Regional museum partners

Though not a focus of this case study, many benefits to the regional museum partners have become apparent. The volunteer recruitment and management toolkit that was developed as part of the World Class Volunteering project was made available to all museums in the region. Undoubtedly, there were a number of such toolkits and documents available already, including those which had been developed through Renaissance funding in other regions. However, regional museums were able to save the 'search cost' (i.e., the resources need to identify and select an appropriate toolkit) and were able to raise questions or issues about the toolkit directly with the Ironbridge and Stoke-on-Trent volunteer coordinators.

At least five museums also benefitted from a greater levels of support to help them improve their volunteering management procedures.¹ As Lucy explains:

'These five museums needed a much more tailored and intensive support programme than the other museums in the region. We were able to help address their museum-specific concerns and provide a level of support that they had not been able to receive from anywhere else up to this point.'

In addition to easy reference of documents and a focus point for questions and advice, the project also offered help with clear capacity constraints of the museums. In several cases, Lucy conducted needs assessments or actually wrote volunteer policies for the regional museums. Whereas in Stoke-on-Trent and the Staffordshire area, Andrew is planning to undertake a county-wide volunteer recruitment campaign on behalf of the regional museums.

Over and above addressing capacity constraints of smaller museums with regards to volunteer recruitment, this coordinated approach is also likely to help place a greater number of volunteers with museums than could be achieved through individual campaigns. It is hoped that the campaign will achieve a "critical mass of opportunity", in that it will offer a greater number of roles and possibilities for volunteers, whose skills and talents will in turn benefit a museum that they might not consider if it tried to recruit volunteers on its own.

Stoke-on-Trent Council

There have been some tangible outcomes for Stoke-on-Trent Council as a result of the volunteering project. These are twofold:

- Andrew instigated collaborations with other council departments (e.g. library services or social care) to place volunteers within a greater range of organisations such as libraries or residential homes. While volunteers benefit from developing more transferable skills and gaining insights into different organisations, they have provided additional resource to various Council-run institutions.
- A recent decision was taken by Stoke-on-Trent Council to cut costs in the museums service by transferring assets and changing the constitutional status of two of the current local authority run museums, Ford Green Hall and Etruria Industrial Museum. During his work on the World Class Volunteering project, Andrew also got involved in a Chamber of Commerce mentoring programme

¹ These five museums were: Aston Manor Road Transport Museum, the Wedgwood Museum, The Queen's Own Hussars Museum, The Orthopedic Experience and St. Georges Medical Museum

and fostered contacts with participants of this programme, many of whom are working in legal and financial professions. Andrew is now drawing on these contacts to receive in-kind legal and financial advice on the constitutional changes in Ford Green Hall and Etruria Industrial Museum. In addition, improved volunteering standards within these two museums as a result of the World Class Volunteering project will facilitate their transition into voluntary-led organisations.

Community groups

The Volunteer Centre on the Blists Hill site is regularly used by a smaller number of community groups, such as a local art club. The meeting space is offered to the groups without cost.

Challenges, successes and legacy

The following aspects emerged as challenges and factors for success:

- Gaining the commitment and trust of paid staff ;
- Convincing existing, 'traditional' volunteers to recognise their need for training;
- Building personal relationships with partner organisations for volunteer recruitment.

A number of documents and toolkits were produced as part of the project which should be made available to museums more widely in order to avoid further duplication of such tools.

Building partnerships with key organisations (e.g. Capgemini and other Council-run services) in order to drive recruitment and to enhance the experience of volunteers stands out as a particular useful model for other museums; as does the idea of running cross-regional recruitment campaigns to improve chances of successful volunteer placement and to support smaller organisations' capacity.

Both Hub museums have made a commitment to retaining the volunteer coordinator posts as they feel that they have gained significant value from the project. At present, both organisations are exploring potential funding options for these posts.

SROI analysis

As discussed above there are two main beneficiary groups: volunteers and the State. Participating museums also receive many benefits from this investment. Other stakeholder groups who have benefitted from this project include Stoke-on-Trent Council and community groups.

While the case study has included a narrative on project elements delivered at Stoke-on-Trent Museums Service and in other regional museums, the full SROI is limited to project activities carried out at the Ironbridge Gorge Museum Trust sites. This decision was taken pragmatically as the project was too large to encompass all aspects within the evaluation resources but it must be recognised that this SROI only captures a very small part of the project.

The impact map below summarises the outcomes for volunteers, State and participating museums, in relation to the resources invested and activities delivered as part of the project.

We focus our monetisation of these outcomes on the benefits most directly associated with the project's stronger emphasis on volunteers' skills and entry into the labour market.

Participants who move off benefits into paid employment are now receiving a wage. Indirectly, this means potentially higher consumption and/or personal savings, with the related higher VAT receipts for the State. Second, the State receives additional tax revenue and no longer has to pay a number of social security benefits, representing savings to the taxpayer or the ability to invest these funds elsewhere. Finally, museums experience increases in productivity of paid-staff from complementarity effects of volunteer services

Below, we describe each component of the Impact Map in more detail. We also discuss the assumptions and research informing our calculations.

Inputs

- The project is 100% Renaissance-funded. A total of £ 259,793 was invested in this project. This includes £81,194 in in-kind contributions from museum staff. This in-kind support includes senior management time with an estimated 8% of the Director of Operation's post.
- The largest single item of cash expenditure was staff costs (£33,876). The Volunteer Coordinator and Volunteer Assistant based in Ironbridge spent approximately 65% and 85% of their time respectively on elements included in the evaluation.
- Expenditure for the volunteer centre amounts to £31,721. As a capital investment, we assume that the lifespan, use and impact of this centre extend beyond the boundaries of this project. We have removed this item from our calculations, but explore how sensitive the results are to its removal.
- Less than 0.5% of the total value of inputs is related to induction, training materials and fees; 11% is related to advertising and recruitment activities.

Outputs

One Hub museum (Ironbridge Gorge Museum Trust) comprising 10 museum sites was involved in the project elements included in our evaluation. One further Hub Museum (Stoke-on-Trent) and 69 non-Hub museums were involved in the overall Renaissance-funded project. With their involvement, the following key outputs were achieved from the project:

- 1 refurbished Volunteer Centre at the Blists Hill site
- 457 volunteers were engaged at Ironbridge museum sites. The project accomplished its aim of recruiting a wider, more sustainable volunteer base – the age profile of volunteers has considerably decreased: 28% of the volunteers are now aged 24 or younger (compared to 5% of the general volunteer cohort), while only 17% are aged 65+ (compared to 68%); 37% had qualifications at or below A-Level.
- Participants delivered 6,477 volunteer hours. 2 Hub museums, 69 non-Hub museums, and 7 other organisations gained advice & training in volunteer recruitment & management. From this, we obtained a breakdown of type of activities for approximately 1,700 volunteers hours. Most of these hours were spent on operational services (visitor services, exhibitions, engineering) and learning and communities activities.
- 4 members of staff in Hub museums and 132 in non-Hub museums received related training.

Outcomes

- Skills development and entry into the labour market:
 - 12 participants progressed into full-time employment. The job roles vary from administrative assistant, maintenance to gardener.
 - All new volunteers received a small amount of formal training (health and safety) as part of their induction process. In addition, some volunteers (5%) took part in additional training in customer services. 1% received training in collections management. Two volunteers completed the NVQ level 2 'Welcome Host' training.
 - There are 3 instances recorded of volunteers progressing to further education/training, above NVQ Level 2.
- Museums report benefits from added capacity and new ways of looking at volunteering and their value.
- Increased CSR commitment to the community

Impact Map Pt. 1

Project Activities	Project Input	Value	Outputs	Outcomes	Social and Financial Value	Justification/ Source			
Implementing new system to improve recruitment and matching of volunteer skills & needs with museums' needs.	Expenditure on project manager and volunteer manager's assistant	£33,876	457 volunteers delivered 6,477 hours of work. 57% of volunteers over 45 y.o. (down from 91%). 62% of them with a UG degree or higher. 62% working in operations-related areas; 16% in learning; 30% played managerial roles.	12 participants in paid FTE	£12,334 annual minimum wage salary FT	From HM Treasury Rates for 2010/11			
						Savings from reduction in benefits payments: Measure savings from JSA only at £3403 per year	Direct.gov.uk		
Development of volunteer management toolkit	In-kind Volunteer Manager/coordinator/staff time at museums	£81,194				3 participants progressed to further education or training (above NVQ Level 2).	Increase in hourly earnings of £4120 per year on average - but with significant time lags (2-7 years). Improved occupational status and satisfaction with job a year after completing training.	Buscha, et al. (2009)	
Development of volunteer recruitment or promotional material, including efforts to move beyond "traditional museum volunteers".	Induction and training materials and fees	£967				Increase in confidence of own abilities and skills from accredited training at NVQ Level 2.	Limited evidence of effects on wage increase. Some evidence of improved occupational status. Some evidence that volunteering and accreditation helps find employment. Some research suggest that accreditation at this level affects negatively earnings	Buscha, et al. (2009); Vignoles, et al. (2010), Jenkins, et al. (2010); Lee (2010)	
	Advertising and other recruitment costs	£25,895				100% trained in Health & Safety; 5% unaccredited training in Customer Service; 1% in Collections Management; 2 volunteers took NVQ 2 Level	Increased in productivity for specific tasks and duties at museums (e.g., operations, collections, learning tasks)	Proxy: the value of the volunteer hours at an upper bound of £23,120	Museum Association Salary Survey, 2009; Bowman, 2009
Training of Museum staff and training, including museum specific training and accredited skills.	Volunteers's expenses	£264				Wider social networks	Captured via interviews. Not quantified	N/A	
Refurbishing former café into a Volunteer Centre	Expenses on recognition, support, supplies, equipment and others	£85,876	69 museum sites participated, receiving advice & training in volunteer recruitment. One site, Blists Hills, with a refurbished volunteer centre.	Increase in confidence in new social situations and networks.	Anecdotal evidence. Not quantified	N/A			
Volunteers provide support to paid-staff on various core and extended services				Wider volunteer base increases capacity to manage visitors' experience	Increases impact of government investment in increasing access to museums	N/A			

Monetisation of Outcomes for Participants

We can monetise the benefits for those participants who moved into paid employment in terms of the additional income they now earn. We have no specific data on the actual wages of these participants. We do know that all jobs are full time permanent posts in the service industry. We assume each person receives the national minimum wage (£5.93 per hour). With no further information, we estimate that a person employed at this wage rate receives a disposable income calculated as the annual salary at a minimum wage rate (£12,334) minus income tax and national insurance contribution.

Participants are not better off by the full amount of their new disposable income. We assume that most of the unemployed participants were receiving a number of state benefits. Participants who are now in paid employment are likely to lose Job Seeker's Allowance (JSA) completely, but may keep other forms of benefits depending on a number of personal circumstances and local authority rules. We estimate the net gain in terms of wages from employment as the difference between their disposable income and the amount of JSA they lose. The current rate for JSA for people over 25 is £65.45 per week. This amounts to £3,403 per year.

Next, we attempt to monetise the benefits from completing accredited training at or below NVQ Level 2. Empirical research suggests that there is limited evidence of the effects of this level of training on wage increases (Buscha, 2009; Vignoles et al. 2010; Jenkins, 2010; Lee, 2010). It does have positive effects on wages when the accreditation is directly related to numeracy and literacy skills or when people gain Level 1 qualifications. There is some evidence that it increases occupational status and satisfaction, in particular amongst women. Some research suggests that accreditation at this level affects earnings negatively. As a result, we do not monetise these benefits.

We now monetise the effects on wages for the 3 participants who progressed to further education or training. Research suggests there is evidence of such impact, but with considerable time lags. Buscha et al. (2009) conclude that it can take between 2-7 years for training above NVQ Level 3 to pay off. They estimate that earnings can increase by £4,120 on average after five years, with significant gender differences. For our calculations, we assume this increase of wages will take place only in year 5. There are also more immediate increases on occupational status and satisfaction, in particular for women.

Monetisation of Outcomes for the State

We assume that the benefits for the State come mainly from three sources. First, the State no longer has to pay some benefits to these participants. We limit our monetisation of these savings to JSA, as discussed above. Second, the State now receives additional income and consumption taxes. We calculate the increase in income taxes only for this evaluation, as explained above. Finally, the State will be receiving additional national insurance contributions, from both employers and employees.

Monetisation of Outcomes for Museums

Research suggests that volunteer work increases productivity of paid workers. As discussed above, a number of activities organised by these museums could only be managed with the help of volunteers. There are a variety of valuation methods

for volunteer hours (Bowman, 2009). We do not have the necessary data to undertake calculations of complementarity effects. We do know, however, the type of jobs these volunteers undertook and estimates of time spent on them. Based on the Museum Association Salary Guide, we estimate that the value of their work was around £23,120. Based on Bowman, these estimates are considered the upper bound of this value, with a lower bound at around 50% of the calculated amount.

We use the upper-bound figure for a number of reasons. We are only estimating the value of a third of the reported total volunteer hours. Our calculations take into account the full price (cash and in-kind) of obtaining all volunteer services that were provided as part of this project. We also assume that the impact of these volunteers on staff productivity does not extend through time.

Establishing Impact

Before calculating SROI, we assess to what level the identified outcomes are the result of the project's activities (see Table Establishing Impact). In particular, we estimate how much of the outcome would have happened anyway (i.e. deadweight), what proportion can be attributed to other factors (i.e. attribution) and how this attribution changes over time (i.e. drop-off).

Deadweight

Based on the SROI Guidebook, we assume a mid deadweight of 30%. This is based primarily on the profile of the participants. Whilst the programme was successful at diversifying its volunteer pool, a large proportion of participants (62%) hold a first degree from a university or similar HE body. This group is less likely to need some additional support to re-enter the job market. On the other hand, the age profile of participants (almost 30% under 24) decreases the level of deadweight.

Displacement and Multipliers

Based on Green Book Guidance and evaluation work by the Department for Business, Innovation and Skills (PACEC, 2009), establishing impact requires understanding whether there are displacement effects (e.g. one person directly benefiting at the expense of other) and multipliers effects (e.g. additional income, output or consumption as a result of the outcomes from the programme). Evaluations of labour market programmes highlight a level of displacement from activities that have a higher likelihood of directly affecting the market. Activities such as hiring subsidies and job search assistance report high levels of displacement (Martin & Grubb, 2001). However, activities that affect the market indirectly such as those aiming to increase productivity through training report no significant displacement (Dahlberg and Forslund, 2005) and are likely to derive

additional benefits to the market (Martin & Grubb, 2001). Throughout all our calculations, we have assumed there are no displacement effects from participants entering the job market due to the programme's emphasis on training or equipping participants to return to the job market. Even if there is any displacement, it would be at least compensated by the induced effects from this employment (e.g. additional consumption). These induced effects are not calculated here due to lack of reliable multiplier data.

Attribution

Research suggests that both policy makers and volunteers hold positive perceptions about the potential effects of volunteering on labour market outcomes. However, there is limited empirical evidence of the link between volunteering and employability (Lee, 2010; IVR, 2009). The path to employability is influenced by many factors, including physical and mental health, skills and wider macro-economic conditions. On the other hand consultancy reports for Charities and Government projects suggest attribution of between 40% to 85% (IVR 2009; Oxford Economics, 2009; Hirst, 2001). These reports highlight that the clearer the employability objectives, the higher the potential attribution of the project. Research also suggests that the training received by participants is likely to increase their chances of entering the labour market (Buscha, 2009; Oxford Economics, 2009).

Our analysis of World Class Volunteering suggests a mid level of attribution due to activities related to increasing skills and ensuring a stronger integration of volunteers in the work practices of museums. To account for the complex link between volunteering and employability, we use attribution of 40%, the lowest identified in the literature.

Drop-Off

There is no data or evidence to assess how long the impact of the programme will last on participants. Further promotions are likely to be caused by on-the-job performance and macro economic conditions. On the other hand, research suggests that there are considerable time lags for the type of training and skills acquired as part of this project to have an effect on the job market. In some cases, the effects can be seen only after 7 years. This suggests the need for monitoring systems that track the progress of participants at least 3 years after the complete the programme. This would not only help arrive at stronger estimates of wages and career progression, but also of the full impact of training activities.

We will assume a drop-off of 33% per year, which ensures that the long terms training effects are still accounted for. Finally, we are assuming very small

increases in wages per year, with latest figures for annual wage inflation at around 0.3% (ONS, 2010).

Impact Map Pt.2

Stakeholder	Intended Outcomes	Result	Deadweight	Attribution	Drop Off	Gross Impact for all participants affected	Minus DW	Attribution	Year 1	Year 2	Year 3	Year 4	Year 5	
Participant	Reduction in Unemployment & Increase in income from employment	12 Participants in FTE positions	30%, given the participants' profile	40%: Limited empirical evidence of link between volunteering and employability. Charity & Government research suggests attribution of 40-85%. At the low end due to activities as part of this programmed aimed at internal/ museum development primarily.	The immediate effect likely to drop as other factors account for keeping or progressing in a job or finding a new job. But drop off kept at 33% to account for the lagged effects from the combination of training and volunteer experiences, as suggested by the literature.	£83,592	£58,514	£23,406	£23,406	£14,582	£9,084	£5,660	£3,526	
	Higher qualifications	3 participants pursue training at NVQ>2	DW at 30% given the educational profile of participants (62% at or above NVQ 3).	40%	Effect takes place in year 5	£31,236	£21,865	£8,746	£0	£0	£0	£0	£8,746	
	Increase in skills	Limited evidence of outcomes	N/A	N/A	N/A	N/A								
State	Reduction in Welfare Payments from	12 participants in FTE positions	30%	40%	33%	£40,836	£28,585	£11,434	£11,434	£8,233	£5,927	£4,268	£3,073	
	Increase in Tax Receipts from employment	12 Participants in FTE positions	30%	40%	33%	£34,536	£24,175	£9,670	£9,670	£6,479	£4,341	£2,908	£1,949	
	Reduction in Welfare Payments from increased qualifications	3 participants pursue training at NVQ>2	30%	40%	Effect takes place in year 5	£12,408	£8,686	£3,474	£0	£0	£0	£0	£3,474	
	Increase in Tax Receipts					£14,700	£10,290	£4,116	£0	£0	£0	£0	£4,116	
Museums	Increase in Productivity from complementarity of volunteers	Participants provide more than 1700 hours of support to core services	N/A	N/A	Assumed to be one-off	£23,120	£23,120	£23,120	£23,120	£0	£0	£0	£0	
									Total	£67,630	£29,293	£19,353	£12,836	£24,884
									Present Value					£142,281
									Net Present Value					-£85,791
									SROI Ratio					0.62
									Payback Period (months)					40.47
									Value Added					-£85,791

Estimating SROI

To estimate SROI, the monetised outcomes are divided by the costs of the project. We estimate a present value of the benefits to society at close to £143,000, which is considerably lower than the initial investment. This translates into an SROI of 0.62. It is estimated the payback period for investors is around 40 months.

These are conservative estimates, in particular given that we are using the lowest annual salary possible, not considering salary from over time and limiting benefits savings for the Exchequer JSA. These estimates do not consider any productivity gains from the complementary effects of volunteering services on full time staff.

We conducted sensitivity analysis by changing the assumptions made to establish impact. We find very little variation as a result of changing the percentages for drop-off. Even the lowest recommended assumption for Deadweight (10%) would result in an SROI ratio under 1. A 70% attribution would bring the ratio above 1. The inclusion of capital expenditure decreases the SROI ratio to 0.55.

Sensitivity Analysis

We conducted sensitivity analysis by changing the assumptions made to establish impact and earnings. We find that the results tend to be more sensitive to assumptions about wages than to the estimates used to establish impact.

We find very little variation as a result of changing the percentages for drop-off. Even the lowest recommended assumption for Deadweight (10%) would result in an SROI ratio under 1. A 70% attribution would bring the ratio above 1. The inclusion of capital expenditure decreases the SROI ratio to 0.55.

If we were to assume that

- 1) Participants who reported getting a job earn the UK median income of £21,221 (*Source: Annual Survey of Hours and Earnings, Office for National Statistics*);
- 2) Hold other assumptions and figures constant;

Then, the SROI ratio is still under one at 0.81. This means a payback period of less than 32 months. These figures could be interpreted as the potential SROI for this type of projects in the long term or alternatively if training activities were more targeted towards higher-skilled jobs.

If we also increase the potential wages to the UK median income for those participants who received training at NVQ3 Level, the SROI ratio is still under 1.

Since these benefits are experienced at year 5, the payback period remains constant.

Conclusions

While the SROI results – when taking a conservative approach – show a modest ratio it would certainly be wrong to conclude that the project is ineffective in their intervention. On the contrary, World Class Volunteering shows best practice in a number of areas as outlined above. Also, it must be noted that the expected outputs and outcomes of the project are not monetary. The project is first and foremost about long-term change and capacity building; and benefits will accumulate over years, not months.

Research sources

- Financial and project information from the Ironbridge Gorge Museum Trust
- Interviews with:
 - Anna Brennand, Deputy CEO and Director of Finance & Resources, Ironbridge Gorge Museum Trust
 - Traci Dix-Williams, Director of Operations, Ironbridge Gorge Museum Trust
 - Lucy Andrews-Manion, Volunteer Coordinator, Ironbridge Gorge Museum Trust
 - Andrew Watts, Volunteer Coordinator, Stoke-on-Trent Museums Services
 - Rebecca Plant, PA to Simon Short, CTO, Capgemini
- Additional research by BOP for Estimates and proxies include: interviews, focus groups, rates and rules from direct.gov.uk & HM Treasury, academic and grey literature (Buscha, 2009; Bowman, 2009; Vignoles et al. 2010; PACEC (2009) Jenkins et al. 2010; Lee, 2010; IVR, 2009; Oxford Economics, 2009).

17 Culture Track at Tyne and Wear Archives and Museums

Introduction and aims

Tyne and Wear Archives and Museums (TWAM) have run a volunteer programme that has two strands. The first, a general volunteer programme, involves approximately 500 volunteers per year across different TWAM museum sites. The primary aim of this programme strand is to enhance museum services through volunteers. The second strand, Culture Track, was co-funded by Renaissance and One North East, the regional development agency (RDA). This strand was aiming to use volunteering as a means of raising employability skills, and to help participants return to the labour market. This programme strand ran for two years and was completed in September 2010.

Culture Track was conceived as part of a bigger One North East pilot scheme that explores how volunteering in the cultural sector could benefit volunteers' employability. Based on the research findings around the contribution of volunteering during the Manchester Commonwealth Games, the RDA supported nine pilot projects in the region, most of which were run by voluntary-sector organisations.

It was agreed that this evaluation would exclusively focus on the Culture Track project strand as it is a good case study of an organisation running a volunteer project with an almost exclusively social sustainability agenda. Also, as Lucy Cooke (TWAM's cross-organisational Volunteer Programmes Co-ordinator) explains, the model of using volunteering to raise employability skills is likely to become increasingly popular in the present difficult economic climate. Culture Track can demonstrate best practice, in particular with regards to the extensive support and resources needed to make such a scheme a success.

Project activities

A project co-ordinator, Lauren Prince, was employed specifically for the project. Initially, volunteers were offered 10-week placements but the programme developed into a much more tailored scheme that followed the needs and development of each individual volunteer. Hence, three quarters of the volunteers remained on the programme for more than six months.

Working with hard-to-engage groups lay at the heart of the project and specific selection criteria for volunteers were defined by One North East. This included people with physical or mental health issues, people in long-term unemployment (above three years), young people not in employment, education or training (NEETs) and people with low skill levels (NVQ level 1). Volunteers were recruited

through a range of referral partnerships, including with the Shaw Trust and Remploy.

Involvement in the Cultural Track programme included the following elements:

- An initial meeting with the volunteer to identify training needs and to assess the volunteer's level of skills, confidence and support needs. This was done using the Culture Track Soft Outcome Wheel.¹ In addition, the volunteers had regular review sessions with the project coordinator and progress was recorded through the Outcome Tool.
- A programme of training and development, including both training relating to specific needs (e.g. literacy, numeracy, IT skills etc.) as well as generic training offered to both core staff and volunteers. The latter included transferable skills training such as customer services, front-of-house, retail and admin skills, as well as heritage-specific skills such as research and archiving skills or specialist skills like book-binding. Some of the training was accredited (e.g. Welcome Host Training).
- A range of roles and placement organisations, as volunteers were encouraged to move around a number of the 12 participating museums and 4 non-cultural organisations to receive as broad an experience as possible.
- Flexible placement structures and formats: while many volunteers worked on a regular basis, the project also offered some one-off volunteering opportunities (e.g. for an event or specific activities)

Compared to TWAM's previous work with volunteers, Culture Track distinguishes itself through the following aspects:

- Work with economic inactive people for the first time
- A better offer for volunteers, including more specific volunteer roles and a formal development process for each participant
- Co-delivery of training as compared to previously, where TWAM provided a work setting, and training was provided by partner organisations
- Ad hoc support and advice given by project co-ordinators to regional museums (e.g. promotion of other museums' volunteer opportunities via the TWAM website)

¹ The Soft Outcome Wheel is a tool which was developed/adapted from the Outcome Work Star model.

Stakeholders and value

More so than any other project in our case study portfolio, Culture Track has a strong focus on developing and supporting volunteers. Therefore, the main beneficiaries of this project are the volunteers themselves. However, the project also had a number of benefits on TWAM and its cultural partners.

Volunteers

Better volunteer offer and support

As part of our case study research we met a small number of volunteers, all of whom had carried out volunteering with other organisations before. However, they felt that the Culture Track programme significantly distinguished itself from their previous volunteering experiences due to its genuine volunteer focus. One of the programme elements they appreciated was the very diverse volunteering opportunities which included a wide range of roles and partner organisations.

The small sample of volunteers we spoke to had all moved through different volunteering placements and they felt that it had enabled them to gain valuable experience in different work settings. In addition to the straightforward benefit of having these experiences on their CVs, they also felt that they would not have been able to gain these experiences within such a short period of time. One of the volunteers explained:

“Before I started with Culture Track I had been volunteering with another organisation and I was working as a pick-up driver. It was a good experience but I was there to take on this specific role and I only ever did that. My work basically replaced that of a paid staff.”

Furthermore, the range of opportunities ensured that one or more suitable roles could be found for each volunteer to help them develop skills in the areas that they were interested in.

Another factor in the volunteers' positive experience was the high level of support that they received through the programme. On the one hand, this relates to financial support in the form of expenses being paid which was a key condition for enabling many of the volunteers to participate. As Lauren Prince explained, most participants received state benefits and could not have afforded the costs relating to volunteering, such as for travel to the sometimes dispersed locations of the volunteer placements. On the other hand, the programme offered a support structure that was, as the volunteers confirmed, very professionally organised. The volunteers not only benefitted from a pre-assessment and regular reviews throughout their volunteering stints which ensured their continuous skills and personal development, but there was a long-term approach to support and

volunteers were able to access help and guidance from the volunteer coordinator even after the end of their Culture Track participation.

Skills development and return into the labour market

Culture Track offered volunteers opportunities for learning and skills development through several different means: it combined on-the-job opportunities for learning with training sessions (both targeted to the volunteer's needs and more general as part of a group of volunteers and staff) and the ability to demonstrate that learning through the achievement of accredited qualifications.

Working in heritage organisations helped volunteers to better understand how museums and archives operate and *"to understand them more intimately"*, as one volunteer described it. Jennifer Kelly, librarian and volunteer coordinator at one of the Culture Track partners, The Mining Institute, adds that while many volunteers had an existing interest in history or museums and valued the sector-specific knowledge, most volunteers were looking to develop more transferable skills during the course of their engagement. The different approaches to learning mentioned above, as well as the range of volunteering roles and placement hosts, helped them to do so: *"Culture Track has provided us with good experience per se, which makes it easier for us to progress from here"*, said one of the volunteers.

As shown in the outcomes section below, the large majority of volunteers have successfully completed accredited training including several volunteers achieving qualifications at NVQ level 2 or even 3. This is in addition to the large offer of unaccredited training that volunteers benefitted from.

Building on these enhanced skills and experiences, almost a quarter of the volunteers have moved into employment since the end of their volunteering, either on a temporary or full-time basis. We also met one volunteer who had recently succeeded to come first out of 700 applications and to be offered a casual job at TWAM but who had to turn down the job offer due to benefits regulations. Nevertheless, he felt that getting to this stage had been a huge personal success for him. Similarly, Jennifer Kelly gave the example of a volunteer who progressed to interview level for a job, something that *"he would have never achieved prior to his Culture Track involvement."*

Personal and social development

While such tangible employability and skills development outcomes were at the core of the project, there is a set of 'softer', personal and social skills that the project has impacted on. The Culture Track Soft Outcomes Toolkit recorded such skills developments in terms of six areas including volunteers' readiness for work, confidence, feeling of support and ability to overcome barriers, knowledge and

skills, and their vision for the future. The results show an overwhelmingly positive development of volunteers and are described in more detail in the outcomes section below.

The volunteers we met confirmed that Culture Track had helped them to go on a developmental journey with regards to a number of these aspects. In particular, the volunteers talked about a severe lack of confidence in their own abilities and ambitions prior to their involvement, often relating to the effects of long-term unemployment. One of the volunteers explained that he had been out of work for so many years, unable to find a new job despite his efforts, that he suffered from depression. He remembered: *"I was only looking to get an up-to-date job reference through the volunteering, but the project has given me so much more on a personal level."*

Volunteers and volunteer coordinators also report of an increase in the participants' confidence in social situations and new social networks. According to Jennifer Kelly, one of the volunteers had previously helped out in the library, *"working solitary – he would literally not speak!"* He then moved onto the Culture Track programme and completed a placement at the welcome desk where he got into a much more social environment which helped him to develop social conversation skills. Other volunteers also talked about having increased the contacts they have with other people, as the project enabled them to get to know new colleagues and people who are *"different"* from themselves but who are still *"sharing similar interests"*.

Participating Museums (TWAM)

Museums staff were not separately interviewed as part of the case study research; however, according to informal staff feedback given to the project managers, Culture Track has made a certain positive contribution to organisational learning and staff development in the following two ways:

- Diversification of the workforce through a more diverse portfolio of volunteers – this is being perceived by visitors and may send out a positive message (Lucy Cooke: *"it helps breaking down barriers"*). This also links in with the organisation's community engagement policy.
- Staff have learned to adopt a more outcome-focused approach to their work. [check]

Other cultural partners

In addition to the organisations that are part of TWAM, other cultural partners have benefitted from their participation in Culture Track. Lucy Cooke reported that most cultural partners had very little experience of working with volunteers and of

providing high standard volunteer support. Therefore, they had mainly offered one-off or short-term volunteer opportunities in the past. Through their engagement in Culture Track, they've been able to offer different types of placements and have been able to improve their volunteer management practice with the support of the central Culture Track Project Co-ordinator, Lauren Prince.

The Mining Institute, one of the cultural partners, was in a slightly different situation at the outset of the project as they had a couple of years experience of working with volunteers (such as university placements, as well the more 'traditional' heritage volunteers) prior to their Culture Track engagement. Volunteer coordinator Jennifer Kelly was committed to further improving volunteering standards and realised the potential of becoming involved in the Culture Track programme when she met Lauren Prince at an event. Indeed, in addition to becoming a host organisation, Jennifer Kelly referred a number of her existing volunteers who fitted the Culture Track criteria onto the programme.

Despite their existing experience, the Mining Institute was able to gain from their participation in a number of ways. Firstly, Culture Track increased the organisation's capacity through additional funding and support. Through the programme and the work of Lauren Prince, the organisation was able to offer additional skills training and development support to the volunteers which they otherwise were unable to provide. The Mining Institute was also able to access additional funding and materials for specific activities (e.g. a specific volunteer project to develop the collection). Moreover, the organisation built new contacts and relationships, for example with the Shaw Trust, which they will be able to build on in future and which will help with the recruitment of volunteers going forward.

Secondly, for Jennifer Kelly herself, the engagement has been a real learning experience. She has been able to attend a number of training sessions that were offered to both volunteers and staff, including customer services training, the Welcome Host training and a session on how to support volunteers with learning disabilities, which Jennifer Kelly considered to be particularly useful to her. These sessions also ideally tied in with her ongoing professional development as she is currently studying for an NVQ level 5 in volunteer management. In addition to the actual training sessions, she really appreciated the support and collegiality with Lauren Prince, and the opportunity to bounce off ideas. As Jennifer Kelly explains, she had *"a real sense of feeling part of something bigger"* through her engagement with the project.

Thirdly, the project had a certain reflection on the organisation's existing, 'traditional' volunteers. In several cases, they developed a type of mentoring

relationship with some of the Culture Track volunteers, e.g. through passing on their own knowledge (and memories) of local history.

Finally, the Culture Track experience has had positive communications and publicity outcomes for The Mining Institute. One of the reasons why the organisation's board decided to become involved was the opportunity that the project presented in terms of raising their profile. As Jennifer Kelly explains, it presented an opportunity to *"be seen as forward-thinking"* and participating in a programme alongside *"shiny and cutting-edge"* organisations like Dance City or the Sage Gateshead enabled them to be seen in this way. Such positive publicity also had a direct impact on volunteer recruitment and has enabled them to attract more volunteers and volunteers with a more diverse profile: *"Many people, even locals, just don't know about The Mining Institute. Through the project, we've attracted volunteers who otherwise just wouldn't have become aware of us."*

Challenges, successes and legacy

Culture Track has proved an extremely successful programme, exceeding its targets and outperforming the other eight pilots that were part of the One North East scheme. One of the main challenges of the project has been to cope with the high demand of volunteers hoping to come onto the programme and finding enough placements for them.

The programme has shown that volunteering in the cultural sector can indeed provide a means to increase employability skills and to return to the labour market. However, as becomes clear, this is not possible without a good support structure and significant resources invested in volunteer training and development. As Lucy Cooke summarises, *"the project has confirmed the idea that, in order to be successful, volunteers are in need of support."*

The RDA project funding has come to an end in September 2010, however TWAM is looking to find funds to continue the programme for at least two more years. To-date, TWAM has submitted two successful expressions of interests to potential future funders and they have progressed to the second round of submitting a full funding application in both cases. Martin Williams, Principal Development and Trading Manager at TWAM, confirms that the Culture Track scheme was exemplary in that it has shown very clearly identifiable and strong social outcomes for the participants and it is hoped that these will help to raise the necessary funds to continue the programme.

SROI analysis

The main outcomes of this project are experienced by participant volunteers, the host museums and project partners. The impact map below summarises these

outcomes, in relation to the resources invested and activities delivered as part of the project.

We focus our monetisation of these outcomes on the benefits most directly associated with the main aim of this project, employability skills. The impact to society from these outcomes is felt directly by two groups in particular. First, participants who move off benefits into paid employment are now receiving a wage. Indirectly, this means potentially higher consumption and/or personal savings, with the related higher VAT receipts for the State. Second, the State receives additional tax revenue and no longer has to pay a number of social security benefits, representing savings to the taxpayer or the ability to invest these funds elsewhere.

Below, we describe each component of the Impact Map in more detail. We also discuss the assumptions and research informing our calculations.

Inputs

- The total cash expenditure for both strands of the TWAM Volunteering Programme was £127,000.
- However, inputs and costs included in this evaluation are those directly related to delivering the employability aims of the Culture Track strand. As listed in the Impact Plan, the value of these inputs comes to £143,771. This includes £58,561 in in-kind contributions from a volunteer manager and coordinator staff time at participant museums.
- As listed in the Impact Map, just over 80% of the value of inputs was made up of wage costs, including salary costs of the project manager and in-kind contributions. More than £10,000 was invested in induction, training materials and fees (7% of total value of inputs).
- Most of project input value was funded by One North East (53%). Renaissance funding contributed to 46%, with TWAM Business Partners fund contributing the remaining 1%.

Outputs

One Hub museum (comprising 12 museums) and 4 non-museum partners participated in the project¹. With their involvement, the following key outputs were achieved:

¹ These 'non-museum' partners included Dance City, Centre for Life, The Mining Institute, The Sage Gateshead

- 69 volunteers were engaged through the Culture Track project. Culture Track attracted a different profile of volunteers from traditional museum programmes. As a group, participants could be classified as economic inactive, with some exceptions. 40% of them had qualifications at GCSE level or lower. 90% were between 26-65 y.o. More significantly, 94% of them were unemployed. 88% were claiming a wide variety of benefits, including Incapacity Benefit and Income Support. 44% claimed Job Seeker's Allowance.
- The volunteer group has completed in excess of 2,828 hours of skills development in total. This equates to an average of 44 hours of skills development per volunteer. 31% completed Accredited Training at NVQ Level 2 or below.
- Volunteers took part in 43 different types of non-accredited training, with the most frequently attended being the volunteer induction (100%), 6-hour diversity training (38%), 7-hour career conference (36%), 6-hour disability equality training (32%) and 1-hour health and safety tour (25%).
- In terms of accredited training, volunteers achieved 64 accredited qualifications (though some volunteers received multiple qualifications) across 8 different types of accreditations, most frequently the Welcome Host accreditation (49%), NVQ in customer services level 2 (13%), Welcome to Tyne and Wear (12%), NVQ Personal Best (City and Guilds) level 2 (9%) and NVQ Information and Library Systems level 2 (6%).
- 6 Hub museum and 4 non-museum staff received training and advice, ranging from informal sharing of toolkits and resources via attendances at the training session 'Supporting volunteers effectively (with learning disabilities)' to completing NVQ in Information advice and guidance level 4 and NVQ Business Admin level 3.

Outcomes

The following key outcomes were achieved from the project:

- People moving into employment:
 - 94% of participants were unemployed at the start of the project compared to 35% post-completion
 - 16 participants (23%) have moved into paid employment (either temporary, full-time or casual employment). We estimate this represents 7.5 participants in FTE permanent posts and 6.5 participants in FTE temporary posts. For our calculations, we assume that the temporary posts last no more than a year.
- Training:

- At least five instances of volunteers moving into further education were recorded including volunteers starting HEFC English and Media Studies, Certificate in Skills for Working Life(EL1), Foundation Degree in interior architecture level 4, MA/MSc Information and Library Management and ECDL

In addition to the above, the Soft Outcomes Tool tracker reveals the following outcomes:

- 80% of volunteers felt more ready for work following their voluntary experience with another 13% indicating 'no change'.
- 83% of volunteers felt their confidence had improved following their voluntary experience with another 15% indicating 'no change'.
- 100% of volunteers felt supported throughout their voluntary experience.
- 77% of volunteers felt more positive after volunteering about overcoming any barriers they were facing that was making it difficult for them to look for work or to volunteer with 19% feeling 'no change'.
- 79% of volunteers felt that their skills and knowledge levels had increased since participating in Culture Track with further 21% indicated having maintained skills at the same level.
- 62% of volunteers feel their vision for the future has strengthened/become clearer after participating in Culture Track. Some volunteers have identified new career paths following their voluntary experience and 36% seeing 'no change'.
- The individuals who indicated a negative progression generally suffer from long-term health problems.

Impact Map pt. 1

Project Activities	Project Input	Value	Outputs	Outcomes	Social and Financial Value	Justification/ Source	
Volunteer needs assessment (e.g., skills and training)	Expenditure on project manager and volunteer manager's assistant	£57,704	69 participants, 40% of them with GCSEs or lower, 90% between 26-65 y.o., 94% unemployed; 88% claiming benefits, mostly JSA.	16 participants in paid employment. - 7.5 FTE Permanent; 6.5 FTE Temporary	Increase in Tax Receipts and National Insurance Contribution Reduction in benefits payments: Measuring savings from JSA only at £3403 per year	From HM Treasury Rates for 2010/11 Direct.gov.uk	
	Progress meetings	In-kind Volunteer Manager/coordinator time at museums			£58,561	5 participants progressed to further education or training (above NVQ Level 2).	Increase in hourly earnings of £4120 per year on average - but with significant time lags (2-7 years). Improved occupational status and satisfaction with job a year after completing
Credited and Uncredited Training and Development	Induction and training materials and fees	£10,179		2828 hours of skills development. 31% completed Accredited training at NVQ Level 2	Increase in confidence of own abilities and skills from accredited training at NVQ Level 2.	Limited evidence of effects on wage increase. Evidence of improved occupational status. Some evidence that volunteering and accreditation together help find employment. Some research suggest that accreditation at this level affects negatively earnings for men. Positive occupational status particularly strong for	Buscha, et al. (2009); Vignoles, et al. (2010); Jenkins, et al. (2010); Lee (2010)
Placements in cultural organisations undertaking different	Volunteers's expenses (e.g., transportation)	£6,460			Wider social networks	Not quantified	N/A
Financial support for participants to attend training and placements	Expenses on recognition, support, supplies, equipment and others	£10,867		6 Hub museum and 4 non museum staff received training and advice.	Increase in confidence in new social situations and networks.	Not quantified	N/A
					Increased in skills and experience in recruiting and managing volunteer projects with employability objectives	Not quantified	N/A

Monetisation of Outcomes for Participants

We can monetise the benefits for those participants who moved into paid employment in terms of the additional income they now earn. We have no specific data on the actual wages of these participants. We do however know the type of job they have taken.

- All jobs are in the service sector. More than half of the jobs are at an “assistant” level; one is at a “manager” level.
- 3 full time jobs as museums or library assistants, at a starting salary of at least £14,500 according to the Salary guidelines of the Museums Association.
- Some participants have taken part or full time temporary jobs. We do not know the actual length of these posts.

To average out all these different profiles, we will assume each person receives the national minimum wage (£5.93 per hour). We assume that the temporary posts will last one year. We estimate that a person employed at this wage rate receives a disposable income calculated as the annual salary at minimum wage rate (£12,334) minus income tax and national insurance contribution.

Participants are not better off by the full amount of their new disposable income. 88% of all participants were claiming a wide variety of benefits, including Council Tax Benefit, Incapacity Benefit and Income Support. 44% claimed Job Seeker's Allowance (JSA). Participants in paid employment are likely to lose JSA completely, but may keep other forms of benefits depending on a number of personal circumstances and local authority rules. We estimate the net gain in terms of wages from employment as the difference between their disposable income and the amount of JSA they lose. The current rate for JSA for people over 25 is £65.45 per week. This amounts to £3,403 per year.

Next, we attempt to monetise the benefits from completing accredited training at or below NVQ Level 2. Empirical research suggests that there is limited evidence of the effects of this level of training on wage increases (Buscha, 2009; Vignoles et al. 2010; Jenkins, 2010; Lee, 2010). It does have positive effects on wages when the accreditation is directly related to numeracy and literacy skills or when the participants gain Level 1 qualifications. There is some evidence that it increases occupational status and satisfaction, in particular amongst women. Some research suggests that accreditation at this level affects earnings negatively. As a result, we do not monetise these benefits.

We now monetise the effects on wages for the 5 participants who progressed to further education or training. Research suggests there is evidence of such impact, but with considerable time lags. Buscha et al. (2009) conclude that it can take between 2-7 years for training above NVQ Level 3 to pay off. They estimate that earnings can increase by £4,120 on average after five years, with significant gender differences. For our calculations, we assume this increase of wages will take place only in year 5. There are also more immediate increases on occupational status and satisfaction, in particular for women.

Monetisation of Outcomes for the State

We assume that the benefits for the State come mainly from three sources. First, the State no longer has to pay some benefits to these participants. We limit our monetisation of these savings to JSA, as discussed above. Second, the State now receives additional income and consumption taxes. We calculate the increase in income taxes only for this evaluation, as explained above. Finally, the

State will be receiving additional national insurance contributions, from both employers and employees.

Establishing Impact

Before calculating SROI, we assess to what level the identified outcomes are the result of the project's activities (see Table Establishing Impact). In particular, we estimate how much of the outcome would have happened anyway (i.e., deadweight), what proportion can be attributed to other factors (i.e., attribution) and how this attribution changes over time (i.e., drop-off).

Deadweight

Based on the SROI Guidebook, we assume a low deadweight of 10%. This is based primarily on the profile of the participants. This group, which includes long-term unemployed and other hard to reach people, is likely to need some additional support to re-enter the job market. Also, a small sample of volunteers interviewed identified that their progress would not have happened without this programme.

Displacement and Multipliers

Based on Green Book Guidance and evaluation work by the Department for Business, Innovation and Skills (PACEC, 2009), establishing impact requires understanding whether there are displacement effects (e.g., one person directly benefiting at the expense of other) and multipliers effects (e.g., additional income, output or consumption as a result of the outcomes from the programme). Evaluations of labour market programmes highlight a level of displacement from activities that have a higher likelihood of directly affecting the market. Activities such as hiring subsidies and job search assistance report high levels of displacement (Martin & Grubb, 2001). However, activities that affect the market indirectly such as those aiming to increase productivity through training report no significant displacement (Dahlberg and Forslund, 2005) and are likely to derive additional benefits to the market (Martin & Grubb, 2001). Throughout all our calculations, we have assumed there are no displacement effects from participants entering the job market due to the programme's emphasis on training or equipping participants to return to the job market. Even if there is any displacement, it would be at least compensated by the induced effects from this employment (e.g., additional consumption). These induced effects are not calculated here due to lack of reliable multiplier data.

Attribution

Research suggests that both policy makers and volunteers hold positive perceptions about the potential effects of volunteering on labour market outcomes. However, there is limited empirical evidence of link between volunteering and employability (Lee, 2010; IVR, 2009). The path to employability is influenced by

many factors, including physical and mental health, skills and wider macro-economic conditions. On the other hand consultancy reports for Charities and Government projects suggest attribution of between 40% to 85% (IVR 2009; Oxford Economics, 2009; Hirst, 2001). These reports highlight that the clearer the employability objectives, the higher the potential attribution of the project. Research also suggests that the training received by participants is likely to increase their chances of entering the labour market (Buscha, 2009; Oxford Economics, 2009).

Our analysis of Culture Track suggests a relatively high level of attribution, in terms to other projects in the cultural sector. The project not only targets a relatively high proportion of its budget to training and skills, but also is part of a wider regional employability programme. To account for the complex link between volunteering and employability, we use an attribution rate of 60%. This is a low to mid estimate given activities organised as part of this programme and the level of investment in training and activities directly linked to employability.

Drop-Off

There is no data or evidence to assess how long the impact of the programme will last on participants. For those in full time permanent positions, further promotions are likely to be caused by on-the-job performance and macro economic conditions. On the other hand, research suggests that there are considerable time lags for the training and the type of experiences that were part of this project to have an effect on the job market. In some cases, the effects can be perceived only after 7 years. This suggests the need for monitoring systems that track the progress of participants at least 3 years after the complete the programme. This would not only help arrive at stronger estimates of wages and career progression, but also of the full impact of training activities.

We will assume a drop-off of 33% per year, which ensures that the long terms training effects are still accounted for. Finally, we are assuming very small increases in wages per year, with latest figures for annual wage inflation at around 0.3%

Impact Map Pt. 2:

Stakeholder	Intended Outcomes	Result	Deadweight	Attribution	Drop-Off	Gross Impact for all participants affected	Minus DW	Minus Attribution	Year 1	Year 2	Year 3	Year 4	Year 5
Participant	Reduction in Unemployment & increase in income from employment	6.5 FTE Temporary Jobs	10%: Low Deadweight given the group targeted	60%: Very limited empirical evidence of link between volunteering and employability. Charity & Government research suggests attribution of 40-85%. We use attribution of 60% given activities organised as part of this programme; conservative given the level of investment in training and activities directly linked to employability	Effect lasts 1 year	£45,279	£40,751	£24,451	£24,451	£0	£0	£0	£0
		7.5 FTE Permanent Jobs			The immediate effect likely to drop as other factors account for keeping or progressing in a job or finding a new job. But drop off kept at 33% to account for the lagged effects from the combination of training and volunteer experiences, as suggested by the literature.	£52,245	£47,021	£28,212	£28,212	£17,576	£10,950	£6,822	£4,250
	Higher qualifications	5 participants pursue training at NVQ>2	Given the group, 70% of participants started at or below NVQ2, low deadweight of 10%	60%	Effect takes place in year 5 based on research suggesting significant labour market outcomes from accredited training happen after 2-7 years from the activity.	£52,060	£46,854	£28,112	£0	£0	£0	£0	£28,112
	Increase in skills	Limited evidence of labour market outcomes	N/A	N/A		N/A							
State	Reduction in Welfare Payments from employment	6.5 FTE Temporary Jobs	10%	60%	Effect lasts 1 year	£22,120	£19,908	£11,945	£11,945	£0	£0	£0	£0
		7.5 FTE Permanent Jobs			33%	£25,523	£22,970	£13,782	£13,782	£9,923	£7,145	£5,144	£3,704
	Increase in Tax Receipts from employment	6.5 FTE Temporary Jobs	10%	60%	Effect lasts 1 year	£18,707	£16,836	£10,102	£10,102	£0	£0	£0	£0
		7.5 FTE Permanent Jobs			33%	£21,585	£19,427	£11,656	£11,656	£7,809	£5,232	£3,506	£2,349
	Reduction in Welfare Payments from increased qualifications	5 participants pursue training at NVQ>2	10%	60%	Effect takes place in year 5	£20,680	£18,612	£11,167	£0	£0	£0	£0	£11,167
	Increase in Tax Receipts					£24,500	£22,050	£13,230	£0	£0	£0	£0	£13,230
Total									£100,147	£35,309	£23,327	£15,472	£62,812
Present Value													£217,130
Net Present Value (breakdown cost)													£73,359
SROI Ratio (breakdown cost)													1.51
Payback Period (months) breakdown cost													17.23

Estimating SROI

To estimate SROI, the monetised outcomes are divided by the costs of the project. We estimate that for every £1 invested in this project, society will benefit by £1.51. This represents a value added to society of more than £70,000 from an initial investment of less than £150,000. It is estimated the payback period for investors is less than 18 months.

These are conservative estimates, in particular given that we are using the lowest annual salary possible, not considering salary from over time and limiting benefits savings for the Exchequer JSA. These estimates do not consider any productivity gains from the complementary effects of volunteering services on full time staff.

Sensitivity Analysis

We conducted sensitivity analysis by changing the assumptions made to establish impact and earnings. We find that the results tend to be more sensitive to assumptions about wages than to the estimates used to establish impact.

We found very little variation as a result of changing the drop-off rate. Deadweight proportions would need to be increased by 300% (at 40%) for the SROI ratio to become £1:£1. This supports our calculation of positive social impact from this project.

Attribution would have to decrease by 33% (i.e., 40% attribution, the lowest rate found in the literature) to lead to a £1:£1 ratio.

If we were to assume that:

- 1) Participants who reported getting a job earn the UK median income of £21,221 (Source: Annual Survey of Hours and Earnings, Office for National Statistics);
- 2) Hold other assumptions and figures constant;

Then the SROI increases to 2.41. This means a payback period of less than 10 months. This figure could be interpreted as the potential SROI for this type of projects in the long term or alternatively if training activities were even more targeted towards higher-skilled jobs.

If we also increase the potential wages to the UK median income for those who received training at NVQ3 Level, the SROI ratio is 2.57. Since these benefits are experienced at year 5, the payback period remains constant.

Research sources

- Financial and project information from TWAM.
- Data from Culture Track Soft Outcomes Tool tracker
- Interviews with:
 - Lucy Cooke, Volunteer Programmes Co-ordinator, TWAM
 - Lauren Prince, Culture Track Project Co-ordinator, TWAM
 - John Hentley, Evaluation Officer, Renaissance North East
 - Three volunteers: Brian, John and David
 - Jennifer Kelly, Librarian and Volunteer Coordinator, The Mining Institute
 - Martin Williams, Principal Development and Trading Manager at TWAM
- Additional research by BOP for Estimates and proxies include: interviews, focus groups, rates and rules from direct.gov.uk & HM Treasury, academic and grey literature (Buscha, 2009; Vignoles et al. 2010; Jenkins et al. 2010; Lee 2010; PACEC, 2009; IVR, 2009; Oxford Economics, 2009); Dahlberg and Forslund, 2005 and Martin & Grubb, 2001.)

