

A CURIOUS PUBLICATION

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Making Formal Learning in Museums Sustainable

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Acknowledgements

With many thanks to all of those who were interviewed and gave time and ideas to this process:

- Sheila MacGregor, CapeUK
- Esmé Ward, Whitworth Art Gallery, Manchester
- Bill Griffiths, Tyne & Wear Museums and Archives, Newcastle
- Jane Avison, Heritage Learning, Hull
- Jane Davies, Lancashire Infantry Museum, Preston
- Gill Brailey, Heritage Learning, Lancashire County Council
- Jennie Pitceathly, Lakeland Arts Trust, Kendal
- May Catt, Barnsley Museums
- Pollie Shorthouse, National Centre for Citizenship Learning (NCCL), Nottingham
- Janet Richardson, National Football Museum
- Tina Ball, Knowsley Museums
- Paul Meara, Catalyst
- Lynsey Jones, MDNW
- Dr Steph Hawke and Kelly Allen, Curious Minds
- All the participants of the workshop run in Preston on 6 July 2016.

1. Background to this report

This report is commissioned by Curious Minds, the North West Bridge organisation, with support from Museum Development North West. It responds to 'A Review of Formal Learning in Museums', which was recently produced by CapeUK on behalf of Arts Council England. The CapeUK review was informed by a survey of over 250 museums across England, a number of one-to-one interviews and discussion groups with practitioners and stakeholders.

Where the CapeUK report presents a snapshot or 'state of the nation' in terms of formal learning in museums in 2016, this report aims to complement the work, focusing in on detailed examples of sustainable practice.

By 'formal learning' we mean learning delivered by trained teachers in a school, academy, college or university with a set of learning objectives and outcomes.

2. Purpose and methodology

This report aims to look at the options available to museums delivering formal learning and to support them to become more sustainable in their practice. It aims to answer the following questions:

- What does a sustainable formal learning practice look like?
- How can I review our own formal learning practice?
- What can I learn from others?
- How do I find out more?

The content has been developed working with a small Steering Group of staff from Curious Minds and Museum Development North West (MDNW). The CapeUK team developing the national report have been generous with their time, sharing their overall findings and draft report content to inform this project. A number of people working in museums and galleries across the UK who have reviewed their own practice and made changes with the aim of future sustainability were identified. They have been interviewed with the purpose of developing case studies to use their experience to illustrate and inform others.

The primary research for this report confirmed that whilst many museums are operating in challenging conditions and being asked to find new ways of working, the enthusiasm and commitment to widening access to collections and to children and young people remains as strong as ever across the sector. The ingenuity, determination and innovation of formal learning teams can inspire many of us to adapt to the challenge.

All of this discussion has been analysed and considered and forms the content of this report. A seminar event was held in Preston in July 2016 to disseminate this thinking and to provoke discussion amongst museums and galleries into whether their own formal learning practice is sustainable and how they might make it more so. The feedback gathered from the participation of museum teams in this event has also informed this report.

This report purposefully does not duplicate the CapeUK report which summarises the external strategic context in which museums, culture and education are operating, as well as detailing the provision of formal learning in museums across England. The two reports are best read together to form a fuller picture.



3. What is sustainable practice?

What do we mean by making formal learning more 'sustainable' within museums? What does 'sustainability' look like? When we asked people developing and delivering formal learning in museums this question, the answers were many and varied:

- "For us it has to be about balancing the bottom line – making sure that the income we generate covers our costs"
- "It's about being relevant, being a 'meerkat', putting your head above the parapet to find out what's needed in your locality, knowing where you can make most difference to people"
- "To me it would mean we're not always chasing the next school booking, we are using our resources effectively – staff, spaces and collections – and building relationships with schools and teachers that will last. It's not about finance, it's about building quality within your own capacity"
- "Doing stuff that guarantees our future, whether that's numbers through the door, generating income, building a reputation, or getting closer to stakeholders"
- "Meeting a need that someone is willing to pay for"

"The quality of your programme, of your resources and ways of working – directly impacts on your ability to generate income to cover your costs. Income can't be increased long-term without investing effort in maintaining and improving quality."

Sustainable practice means different things to different people, depending upon your immediate situation. For those with an urgent need to build their case in a cash-strapped organisation, being sustainable can come down to making the figures balance. Showing that you can generate enough income to cover your costs. But even in dire straits, those in this situation know that the income you generate will look far healthier when you have developed relationships with teachers, built a responsive programme that meets their needs and builds on your own strengths and capacity and are working to a plan that is responding to your local context.

The quality of your programme, of your resources and ways of working – directly impacts on your ability to generate income to cover your costs. Income can't be increased long-term without investing effort in maintaining and improving quality."

So what does sustainable practice look like?

- It is responsive and agile to changing needs
- It has strong, two-way communications to understand and respond to your audience – consulting, testing, involving, not just broadcasting
- It is relevant to your locality
- It is aware of the balance between costs and income and able to address imbalance
- It builds evidence of your impact on people and communities that addresses the priorities of your funder(s) and stakeholders and builds your 'business case'
- It makes the most of your strengths and addresses your weaknesses
- It diversifies income streams and has an exit strategy when funding is due to end
- It invests time in reflection across the team – understanding what works and what doesn't and how to address this

3. Cont... What is Sustainable Practice?

Balancing act

Some of those interviewed for this report have called this 'being entrepreneurial' whilst noting that this is not about being 'profit-driven'. Making a profit – or even balancing the books – is about delivering quality that meets the needs of your customers (audience or participants) and understanding the wider marketplace. Being entrepreneurial does not have to mean throwing your people-centred vision in the bin. Nor does it turn its back on stewardship and care of collections.

Bill Griffiths, Head of Programme at Tyne and Wear Archives and Museums, talks about the careful balancing act that their service has to perform between the different dimensions of performance required. His team have to deliver against three potentially competing sets of measures: financial (e.g. bringing in commercial revenue), operational (e.g. compliance, asset stewardship) and political (access and inclusion and footfall). The balance sits in a different place for everyone – but understanding who is prioritising each set of measures (and why) is vital.

Understanding the figures

Fifteen museum services from across the North West were represented at the workshop we held in July 2016 and participants were clear about the importance of interrogating the figures. Without knowing your booking levels, costs and breakeven points, it is not possible to deliver a sustainable programme.

A participant volunteered an example which illustrated the point. They reported a time when charges for school workshops had been reviewed at their museum. A member of the team had suggested rounding down the figure in order to simplify the charges and had not realised that this small tweak would wipe out any profit the museum would make from the workshop programme. The figure stayed at its original level.

“Without knowing your booking levels, costs and breakeven points, it is not possible to deliver a sustainable programme.”

FINANCIAL

POLITICAL

OPERATIONAL

3. Cont... What is Sustainable Practice?

Enterprise and resilience

Museums are increasingly considering the social enterprise model, where business innovation seeks a profit in order to address social needs. Any profit is invested straight back into the business delivery. Social enterprise allows business principles and value to co-exist with public sector values like being responsive to your community and serving the public interest. It generates both social value (measurable impact like learning) and economic value (revenue). Some museums have already adopted this model, e.g. The Museum of East Anglian Life and Norton Priory in Cheshire.

The independent museum sector is a good source of information and ideas around enterprise models. The Association for Independent Museums (AIM) has developed a programme of research and activity around 'Prospering Museums', identifying the hallmarks or characteristics as shown below.



AIM Hallmarks of a Prospering Museum (Association of Independent Museums)

www.aim-museums.co.uk

The Museums Accreditation scheme also makes the case for resilience and sustainability, both in section one which looks at a museum's 'organisational health' and in section three looking at 'users and their experiences'. The scheme encourages museums to develop their programmes from a strong vision, mission and strategy.

3. Cont... What is Sustainable Practice?

Arts Council England commissioned Mark Robinson from Thinking Practice to consider resilience for the sector. He explored the idea of 'Adaptive Resilience' in his 2010 report for ACE ('Making Adaptive Resilience Real') and voiced the idea that change can be a good thing.

"Adaptive resilience is the capacity to remain productive and true to core purpose and identity whilst absorbing disturbance and adapting with integrity in response to changing circumstances."

Mark Robinson,
'Marking Adaptive Resilience Real', Arts Council England, 2010.

Whilst these ideas of being entrepreneurial and resilient may be permeating the sector's leaders, perhaps the reality of those working in delivery roles without the perceived luxury of time to reflect and be proactive means they aren't filtering through to the wider staff and volunteer teams. The reality of financial cuts and need for urgent decision-making is often the driving force and seen as a negative one. Learning from those who have experienced this challenge, there's an opportunity to make the perception of being entrepreneurial, resilient and adaptive in the museum and heritage sector into more of a positive – being agile, responsive, trying out new ideas and involving our participants in their development. As one interviewee said "let's make the learning team into the Research and Development wing of our organisations. Trying out new ideas. We're outward-facing, we are in a great position to achieve this."

"Let's make the learning team into the Research and Development wing of our organisations. Trying out new ideas. We're outward-facing, we are in a great position to achieve this."

Agile thinking

Battersea Arts Centre is an interesting example of this approach to testing out new ideas. The Director, David Jubb¹, talks about working in an arts organisation which combines being a learning organisation with being an agent of social change, as well as being a business. The Centre has been at the forefront of developing agile working within the arts sector – they call this 'scratch', a type of user-based design.

Over 10 years ago the team at Battersea began to apply this process to everything they do, for example applying a 'scratch' approach to building development, to organisational structure, to working with teachers in schools, to supporting young people to develop new enterprises. It is a participative process, involving the 'users' in the design of new ideas. This might be in building new programmes, making changes to spaces, developing new content. Scratch is about testing a hypothesis or idea with the public at an early stage and going back to them a number of times until you feel the idea can be fully formed.

Jubb sees the scratch process as a way of changing the organisation to "do more things that people who live near us actually care about". Battersea Arts Centre, working with Gaby Porter, has developed this idea into the Creative Museums Programme with six museums working together for two years from 2015 to develop new ways of working using 'scratch'.

3. Cont... What is Sustainable Practice?

For more info see www.bac.org.uk/creativemuseums

There are many examples of how museums are increasingly testing out ideas with potential users as they develop their plans. To name just a few within the North West: Manchester Museum's recent 'inflatable museum' is being taken out to local schools to see how it works; Pennine Lancashire Museums have piloted and tweaked nine new school sessions with local schools before including them in their promotional leaflet and opening them up to bookings; Manchester Jewish Museum are testing out ideas to develop school programmes on the local history of migration and the feasibility of multi-faith tours with three local schools.

Sustainability – a holistic approach

Involving schools - teachers, pupils, governors, business managers – in developing your programmes is certainly a positive step to ensure you're providing something that is wanted and meets their needs. But sustainable practice is more of a holistic approach to how your organisation works.

A review of the available literature on sustainable practice in museums has identified a number of different principles, frameworks, hallmarks and traits for organisations to aim for. The resources list within this report gives a number of these for further reading, recognising that no one size fits all and you may want to adapt these to your own circumstances.

Making use of the primary and secondary research in this area, we've identified our own summary of some of these key characteristics of sustainable formal learning in museums.

These include reviewing:

- Your organisation's structure and whether it constrains your future development
- What your formal learning programme offers, whether it meets your customers' needs, makes the best use of your strengths and resources and identifies your unique selling point (USP)
- How effectively you communicate – with stakeholders, with users or participants, with each other
- How you generate income or secure funding;
- How you manage your assets (your collection, buildings, staffing)
- How you deliver (staff, freelancers, partners)
- How you manage information, gather knowledge and understanding about your practice
- Your organisational culture and willingness (and ability) to change, take risks, embrace new ideas and experiment. This includes your attitude to diversity – for example in funding, or in skillsets and experience within the workforce.

These are fundamental questions for an organisation, much wider than those operating at a delivery level may feel able to tackle alone. A review is most often driven by the museum director and leadership team, but increasingly learning teams are putting themselves in the driving seat and taking a proactive approach. Some museums are at a point in their life-cycle for a fundamental review, others may need to consider making tweaks and smaller changes to their service to deliver more incremental improvements.

A series of case studies follows with examples of how some museums are tackling these questions, within many different contexts, working on different scales and at different points in their life-cycle. It might be that no single case study exactly reflects your position, but we hope that the variety of examples will inspire you as you reflect on your own ways of working.

i) Lancashire County Museum Service

Applicability for other Museums

<input checked="" type="checkbox"/>  New ways of working in light of financial cuts	<input type="checkbox"/>  Out-sourcing delivery	<input type="checkbox"/>  Limited capacity
<input type="checkbox"/>  Separate business unit	<input type="checkbox"/>  Independent museum	<input type="checkbox"/>  Military museum
<input checked="" type="checkbox"/>  Multiple site service	<input type="checkbox"/>  Small museum	<input checked="" type="checkbox"/>  Local authority service

Context / Reason for Change

Lancashire County Museum Service is managed by Lancashire County Council and runs 10 museum venues across a large county, in urban and rural settings. The Learning Team run a successful programme for schools across the county and secured funding in 2013 from the Arts Council's Museums and Schools programme for an initial three years (now extended to a fourth) to test out new ways of working with schools across museums in the area of Pennine Lancashire.

This has included a look at how feasible it is to have one consistent fee for schools' programmes across Pennine Lancashire, which has not proved possible given that the participating venues cross many different governing bodies and local agreements.

In 2015, needing to make increasing financial cuts, the County Council Members decided that they would look for alternative operators for the five museums owned by LCC (the others being operated on behalf of other authorities). The Learning function had already become a separate team working across Cultural Services.

"The individual relationships with teachers and schools that have developed have meant the quality of the programme has improved, marketing techniques are better understood and the teachers act as advocates for working in partnership with museums."

The Learning Team currently receive funding from schools under Lancashire's de-delegated system whereby Local Authority maintained primary schools make an annual decision whether to pay up-front for some county-wide services, including cultural learning. If the move towards all schools becoming Academies continues, this funding stream will be threatened. The team are now considering new income streams.

Activity

The Learning Team are now operating as a central resource and have to cover the direct costs they incur i.e. salaries, training and expenses. Their overhead costs (building, utilities, insurance) and services such as finance and human resources are met by the Council. The Team's core work is in developing programmes and sessions for the County's museum venues, promoting these and building relationships with teachers. The sites have their own operational budgets. The central Learning Team pay for the resources, pay the freelancers and give a percentage of the money received from a school visit to the site to cover administration and staff time.

The Team are now offering their development services to other providers and recently won two contracts to develop schools programmes for museums and heritage venues outside of Lancashire County Council. This new income has to contribute to the Team's overall costs as well as cover additional expenses that the work incurs.

The Arts Council England Museums and Schools Programme has provided an opportunity for the Team to test out new ideas. Working closely with teachers has been the key theme of this work and teachers have been paid to develop ideas and resources for the museums. The programme has involved a partnership with the Victoria and Albert Museum and the Learning Team were able to invite teachers to go with them to visit the V&A in London.

During the visit they learned about how the Museum uses its collections creatively and invests in teacher professional development events. It is notable that offering to pay for the teachers' time encouraged lots of teachers to get involved, but that very few actually invoiced for their work, preferring to give their time for free. The individual relationships with teachers and schools that have developed have meant the quality of the programme has improved, marketing techniques are better understood and the teachers act as advocates for working in partnership with museums. Teachers have spent time mapping the Museum collections and programmes to National Curriculum areas and freelancers have been paid to spend time talking with teachers to develop online resources to meet teachers' needs.

The programme has also prioritised the need to collect evidence of impact on teachers and pupils, which has been valuable in making the case for the Learning Service to continue in the face of increasing budget cuts. The strength of feeling amongst teachers to keep the service has also been invaluable.

Between 35-40,000 children engage with Lancashire's schools programmes each year. The LCC sites work to a target for 10% growth in visits, outreach and educational loans and this has been achieved 2013/14 to 2014/15.



i. cont . . . Lancashire County Museum Service

Looking Forward

The Learning Team has a business plan in place and they are seeking out commissions from other museum services to use their knowledge and experience in developing schools programmes. Trading their expertise in this way aims to further diversify the Team's income streams. If the five museums under threat of closure find new operators, the Learning Team will look to negotiate agreements to deliver schools programmes at each venue.

The Learning Team consists of one manager, three full-time learning officers, a loans officer and a part-time driver for the loans service. The Team aims to cover the cost of one of those salaries by increasing income from educational loans boxes by 10%. All of the other salary costs need to be covered by income generated from securing new work commissions or attracting funding.

Teacher engagement is another priority to keep developing this year, as well as the take-up of new sessions. The team's 'Simply Schools' marketing print enjoys a good reputation and reach amongst teachers and the team have been selling space within the brochure to other museums and heritage schools programmes for a number of years. This is now bringing in a small profit and the team are looking to increase this over the next year.

The team constantly review management information, analysing bookings to increase their knowledge of schools' behaviour and the performance of different elements of the programme, e.g. using the loans service which books at least one term ahead, the team can see the topic trends and use this to develop or strengthen appropriate learning sessions, buy in resources to respond to increased requests and create 'special events weeks' at key times in the year. These event weeks produce a higher profit margin and engage with a large number of children over one intense week of well-resourced activities that tie in with the loans that teachers booked months earlier.

"The starting point for future plans should always be an understanding of where learning sits within your organisation"

Key Learning and Advice for Others

- The starting point for future plans should always be an understanding of where learning sits within your organisation – you need to work hard to advocate for your service if you want to be given the reins to make changes
- You can never start making the case for your service too soon – budget cuts happen quickly and building up support and evidence takes time
- Seek out external funding to help give you the security to test out new ideas and ways of working
- Be entrepreneurial – understand your strengths and play to them to secure your future
- Invest time and effort in building relationships with individual teachers (including teacher professional development opportunities) and build in the cost of paying for their time into project funding bids.

CASE STUDY 2

Independent museum

ii. Tyne and Wear Archives and Museums

Applicability for other Museums

<input checked="" type="checkbox"/>  New ways of working in light of financial cuts	<input type="checkbox"/>  Out-sourcing delivery	<input type="checkbox"/>  Limited capacity
<input type="checkbox"/>  Separate business unit	<input type="checkbox"/>  Independent museum	<input type="checkbox"/>  Military museum
<input checked="" type="checkbox"/>  Multiple site service	<input type="checkbox"/>  Small museum	<input checked="" type="checkbox"/>  Local authority service

Context / Reason for Change

Tyne and Wear Archives and Museums (TWAM) is a multi-site service of museums, galleries and archives with nine sites which it manages on behalf of five Local Authorities and the University of Newcastle.

TWAM is a Major Partner Museum funded by Arts Council England, is the Bridge organisation for the North East and also delivers the Museum Development programme for the region. The collections cover archives, art, science and technology, archaeology, military and social history, fashion and the natural sciences.

"Black Radley consultants were commissioned to work with TWAM to look at developing an 'enterprise culture'."

In 2010 the service was looking to make budget cuts and reviewed its operations and services in this context - where could savings be made and how could more income be generated? TWAM has a people-centred vision 'to help people determine their place in the world and define their identities, so enhancing their self-respect and their respect for others' and there was initial concern that a focus on generating income, could be at odds with this.

The management team listened to concerns and acknowledged that this meant a major cultural shift for the staff. Black Radley consultants were commissioned to work with TWAM to look at developing an 'enterprise culture', to support the venue managers to become 'captains of their ship', to empower staff to make decisions and manage their own budgets and income.

ii. cont . . . Tyne and Wear Archives and Museums

Activity

The schools programme had been free of charge up to this point and it was decided to introduce charges for facilitated visits (self-led would remain free).

There were concerns amongst learning team staff that introducing charging would adversely affect relationships with schools and booking levels. In the first year of charges there were no income targets set, staff felt reassured and the careful change process left them feeling more empowered in their work.

The team did plenty of research into the market place before setting charges, exploring what other providers offer and charge (not just museums – thinking more broadly about where schools go for learning outside the classroom). The process involved a review of all the learning team programmes, to improve quality, marketing and customer service alongside the new charges.

Instead of dropping, the level of school bookings has risen. The majority of teachers were happy with the new charge – and the team spent time communicating the reasons and ensuring that the quality and value of the service was prioritised.

The change has been a positive one for staff, with discussion encouraging new ideas in a more proactive culture and regular training to develop confident decision-making, financial management and customer care. The people-centred vision remains, but the staff now see the need to generate income as a means to an end, to deliver their work, rather than being driven purely by making money.

The learning team have been trained to 'up-sell' and suggest different products to teachers. One suggestion from the team was to develop the 'Boxes of Delight' loan boxes into an improved service which could be charged for.

An annual Membership Scheme for schools is now in place for this service, charging £250 per year, giving members the chance to make savings on loan boxes (they can borrow five boxes which would have cost £60 each without membership), priority booking, invitations to twilight handling sessions and testing out new ideas for content. A discount of £50 is offered for early bird renewals each year as an additional incentive. In fact around one third of bookings are now from schools that never used the service when it was free. In its first year of the scheme 78 memberships (almost £20,000 income) have been taken by local schools and additionally schools continue to book single loans.

The learning team meet regularly to review performance. Income targets are set in negotiation with the Local Authorities and are realistic yet stretching. The targets are collective across the nine sites, which means that if a site is struggling to meet its target, the whole team share the responsibility to solve the problem. The income generated by school visits is not ring-fenced to learning but contributes to the overall financial performance of the service.

There has been approximately a 10% increase in schools visiting TWAM venues since charging was instigated in 2010. There is also a more efficient use of time as fewer schools cancel bookings at the last minute now they face a financial charge for doing so at short notice. Staff are engaged and focussed on delivering a high quality and sustainable service across the organisation.

“... around one third of bookings are now from schools that never used the service when it was free”



Looking Forward

Delivering quality is vital to TWAM learning, so they are always on the lookout for new ideas and improvements. In 2015 they undertook a peer review with colleagues at Leeds City Museums to explore what is meant by quality in relation to the Arts Council England's Quality Principles. In 2016 a new TWAM are delivering a new Quality Framework which will help the service to better use evaluation and data in order to improve. Engagement with teachers continues to be a priority. A number of Advisory Boards have been established across the service, with local people participating in supporting the decision-making process. This includes teachers and youth workers to advise on future developments across the totality of the learning offer. The team are also developing more professional development opportunities for teachers this year.

Key Learning and Advice for Others

- Introducing charging and responsibility for income generation is a major cultural change for staff and needs to be managed carefully
- Bringing in charges for the first time needs to be done alongside improvements to quality and service
- Empowering staff to respond proactively to customers and to suggest new ideas, can deliver great improvements
- Lift your head up beyond your organisation - peer review and external support can be vital when making major changes
- Regular performance review can be a collective and productive process if discussed and shared across a team and if suggestions are acted upon
- Accept that change takes time

CASE STUDY 3 military museums

iii) National Centre for Citizenship and the Law (NCCL)

Applicability for other Museums

<input type="checkbox"/>  New ways of working in light of financial cuts	<input type="checkbox"/>  Out-sourcing delivery	<input type="checkbox"/>  Limited capacity
<input checked="" type="checkbox"/>  Separate business unit	<input checked="" type="checkbox"/>  Independent museum	<input type="checkbox"/>  Military museum
<input checked="" type="checkbox"/>  Multiple site service	<input type="checkbox"/>  Small museum	<input type="checkbox"/>  Local authority service

Context / Reason for Change

The National Centre for Citizenship and the Law (or NCCL) is part of The Egalitarian Trust which was established in 1993 to save Nottingham's Shire Hall from potential demolition. The Hall was opened as the Galleries of Justice in 1995 and in 2000 the charity's education department became a separate business unit known as the NCCL. The Trust is managed by one Chief Executive, with an Executive Director running the two divisions (the operational museum side and the learning side). The Trust's mission is:

"... the NCCL team identified the opportunity to provide expertise and resources to museums who do not have the capacity to offer formal learning programmes but who would like to do so."

The Business Plan for the Trust emphasises the need for a mix of income streams for future sustainability and the team continue to identify potential funding from a variety of sources. As part of this outward-facing approach, the NCCL team identified the opportunity to provide expertise and resources to museums who do not have the capacity to offer formal learning programmes but who would like to do so.

Activity

NCCL have developed this opportunity into a number of different services on offer to other museums, heritage and legal sites. The NCCL team offer:

- To develop location-specific resources and programmes for other sites to deliver themselves, e.g. in Wandsworth the NCCL team wrote workshop scripts and trained the venue staff to deliver them and in the East Midlands the team wrote teacher resource packs for venues who didn't have the space or staffing to deliver workshops
- To develop and deliver location-specific workshops for schools within other sites, e.g. in Northampton, the NCCL developed workshops for the courtrooms and judge's lodgings and were then asked to also deliver them. NCCL pay a rental fee to use the venues and use the schools' booking fees to cover their own delivery costs
- Consultancy advice and expertise to other services, e.g. at Brighton and Hove, the NCCL team helped develop a partnership of local museums to offer a joined-up schools programme and deliver joint marketing

In some cases, NCCL have also brought in other partners to support a project. In the East Midlands, the team secured Heritage Lottery and Arts Council funds to develop resources for six locations that did not have the capacity to work with schools. NCCL worked with interns from Nottingham Trent University as part of their Post Graduate Certificate in Education to create and deliver education resources for museums in the East Midlands. PGCE students were trained to develop and deliver the sessions, providing students with practical experience they could refer to in job applications.

NCCL have developed a collaborative model called 'Education Syndicates'. They have partnerships with other museums and heritage sites in Manchester (at the Civil Justice Centre, Crown Court, Bolton

Magistrate's Court, Manchester Police Museum and People's History Museum) and at the Royal Courts of Justice in London as well as their base in Nottingham, with a Learning Manager at each of the three bases. The host organisation will provide the premises and facilities and the NCCL has the capacity and ability to provide the facilitators and create learning programmes on their behalf. The NCCL team will manage the promotion, booking and delivery of the programmes with an aim to maximise access and increase income for both partners. To schools this model appears as a seamless service with consistent levels of quality, charging and provision.

"NCL charge schools for all bookings and have found that schools perceive an increase in value for a fee-charging service compared to a free one."

Income has been diversified further with a number of successful commissions for NCCL projects from Nottinghamshire County Council, e.g. 'I Pledge' project to reduce youth crime and 'Virtual Justice' project to understand the potential for cyber-crime. These commissions are the result of building relationships over a long period to understand the Council's priorities and to identify opportunities for joint working at an early stage. The benefits of networking and advocacy can be seen in the backing of the cyber-crime project by the County Police and Crime Commissioner.

An example of this agile working is NCCL's success in securing a grant from the Mayor's Fund for London to work with schools and disadvantaged pupils on a citizenship project, including the chance to meet with legal professionals and consider new career options. The funding mix for the project meant NCCL could secure a financial commitment from schools up-front and charge £9 per pupil to participate.

iii. cont . . . National Centre for Citizenship and the Law (NCCL)

This was achieved thanks to the relationship built up with the Mayor's Fund for London, but also thanks to their experience in asking schools to use Pupil Premium Funds to help pay for projects. NCCL charge schools for all bookings and have found that schools perceive an increase in value for a fee-charging service compared to a free one. The team will negotiate discounts at times and have supported schools with ideas for fundraising with the Parent and Teacher Association to cover costs.

The team have also tried to tackle the cost of transport for schools making visits, knowing that this is a key barrier for some. They have included the cost of subsidised (or free) transport for schools to visit museums in their bids for external funding, as well as negotiating a discount from a local coach provider by using their quiet times outside of the start and end of the school day.

The programme covers a number of curriculum areas including PSHE, Citizenship, English, History and promoting British Values.

Sustainable practice is about developing a service that delivers NCCL's responsibility to give the public access to learning about the law. Whilst this needs money to deliver it, the service recognises that this can only be sustainable by developing long-term relationships with teachers, schools, and other museums.

Looking Forward

A key area of change this year is for the two wings of the organisation to be re-branded as the National Justice Museum in summer 2016.

The Business Plan has prioritised expansion of the learning service, aiming to find a further centre in Wales or the South West of England in the near future. The team currently engage with around 20,000 pupils each year across their three sites (Nottingham, Manchester and London) and a fourth centre will enable them to increase their reach. Most of the team's bookings are repeat visits. In the past the majority of their bookings came from secondary schools (75%) bucking the national trend. In the last year or so this percentage has dropped a little, though the total number of bookings continues to steadily increase. So the team will review their programmes and relationships by consulting with secondary schools to make sure they can still meet their needs.

At the moment, the programme is based on workshops and led sessions in venues. The team are developing loan boxes and outreach this year.

Key Learning and Advice for Others

- Think 'collaboration' not competition
- Invest time and effort in developing relationships with other museums to develop ideas and partnerships which evolve over time
- Prioritise building your relationship with teachers and schools
- Develop your programme and operations by taking the teacher's point of view
- Include the cost of teacher time (and classroom cover) in funding bids if you want them to work with you on development
- Address the key barrier for schools in making visits, i.e. transport costs
- Don't put all your eggs in one basket in terms of funding, aim to diversify your income streams
- Be confident about charging and communicate the value and outcomes that schools will receive

CASE STUDY 4 separate business unit

iv. Heritage Learning, Hull

Applicability for other Museums

<input checked="" type="checkbox"/>  New ways of working in light of financial cuts	<input type="checkbox"/>  Out-sourcing delivery	<input type="checkbox"/>  Limited capacity
<input checked="" type="checkbox"/>  Separate business unit	<input type="checkbox"/>  Independent museum	<input type="checkbox"/>  Military museum
<input checked="" type="checkbox"/>  Multiple site service	<input type="checkbox"/>  Small museum	<input checked="" type="checkbox"/>  Local authority service

Context / Reason for Change

Hull Museums' formal learning programme began as a loans service for schools in the 1980s and remained so until Renaissance in the Regions funded a new staff team in the mid-2000's to engage with teachers. Some of the new team came from non-museum backgrounds and a new 'have a go' culture developed from this point. A number of national projects were delivered, work on literacy and dementia began and new connections and networks were established. Future funding was identified as a concern in 2009 when a new manager identified that all of the learning team's work was funded through Renaissance.

The team decided to prioritise advocacy to target key influencers and strategic directors within the City Council. Evaluation and research were commissioned to develop measures and evidence of impact. Despite the strength of the case made by the evidence, the Council could not identify future funding, so the team had to consider different avenues. The advocacy work did mean that the Council were supportive of discussions about how to maintain the service under a different business model, recognising its contribution and impact.

The Head of Learning, Jane Avison, decided to explore a new business model and spent one year researching options. An option to leave the Local Authority entirely was discounted given that the learning programmes need the museum collections at their heart, so an alternative option was developed. Jane looked at the key components – product, marketplace, customers. A business mentor was appointed and Jane spoke to others across the heritage, charity and business sectors. Funding for this research period was secured from Arts Council England's Resilience Fund, with lots of time and support given by ACE Officers, the Head of Museums, and the City Council.

iv. cont . . . Heritage Learning, Hull

By 2010, a business plan was presented to the Council and it was agreed that the museum learning service would operate as a trading organisation under the name 'Heritage Learning' as a self-funding not-for-profit business unit, within the infrastructure of the Hull Culture and Leisure Company (which runs parks, leisure and cultural services in the city) with a partnership agreement with the Museum service.

Activity

Heritage Learning has now been established for around six years and operates a service across the 11 museums and galleries across Hull. In 2015/16 around 11,500 pupils engaged with the service. Heritage Learning operates on a full cost recovery basis, in this case generating income to cover the cost of their salaries, equipment and resources. The team are charged a peppercorn rent for office space in one of the museums, and receive IT and curatorial support from the museum team. A partnership agreement between Heritage Learning and the museums establishes the operations in place. The museums receive a schools programme and Heritage Learning set the charges to schools, promote and take bookings and take all income to cover their costs in delivery.

"A key contact in the schools is often the School Business Manager who needs to be convinced of the value of museum learning before bookings will be made."

The team also generate income through consultancy work and project management commissions (for example, for a Hull Curriculum which is described below). The original business plan anticipated the need for additional income from grant applications, but this has not been necessary so far.

The schools programme on offer is a series of workshops across the 11 venues that deliver across the National Curriculum. The team also develop projects, such as the Hull Curriculum currently in development and commissioned by the City Council as part of Hull's 2017 City of Culture status. The Hull Curriculum has involved Heritage Learning in engaging with every school in Hull, with teachers shortlisting 20 'stories' that tell the city's history using objects from the collection.

Engaging with teachers is vital to the success of the model. A schools membership scheme helps to develop this and teachers advise the team on projects, including their participation on a 2017 City of Culture Panel. A key contact in schools is often the School Business Manager who needs to be convinced of the value of museum learning before bookings will be made. Amongst the ten core staff at Heritage Learning is a Customer Relations Coordinator who manages the relationship with teachers. The priority and time given to this area means the team are proud to have been nominated in the 'Customer Service' category within the 2016 Museums and Heritage Awards.

The whole process of establishing the new business unit has been extremely challenging for all involved. The biggest task was to take the team through a process of change management, to develop an entrepreneurial approach, identifying opportunities to generate income, even using new terminology. Some members of staff left as they didn't want to make the transition. The team are now back up to ten members and have the same core values as before, with a mission to "support young people in Hull." The success of embedding a new culture has been in realising that without making such a change, the learning programme would not exist.

"You need to develop one to one relationships with teachers, the point of view of one teacher cannot be assumed to be representative."



Photo Credit: Oakham Castle, NCCL, Public Legal Education Syndicates

Looking Forward

The Hull Curriculum is being developed by the team in readiness for a launch in 2017. The support of the BBC was recently secured in a partnership to use BBC archive material on a digital resource for teachers. Heritage Learning has managed to run with a small surplus in recent years which is put back into developing the service. As a business unit, performance is under regular review. For more info see www.heritage-learning.com

Key Learning and Advice for Others

- Invest in time to consider your future options before the need is urgent
- Reliance on one source of external funding for a service can leave it vulnerable to cuts
- A change in governance and business model needs to go alongside a change management process to support staff to adapt to a new culture and way of working – and there may be some staff who don't want to change
- Decide what works for you, understand your strengths and play to them, address your weaknesses. There isn't one perfect answer that suits everyone
- Invest in time researching and listening to your customers – and not just as a one-off, but continually
- You need to develop one to one relationships with teachers, the point of view of one teacher cannot be assumed to be representative

CASE STUDY 5

new ways of working in light of financial savings

v) National Football Museum, Manchester

Applicability for other Museums

<input checked="" type="checkbox"/>  New ways of working in light of financial cuts	<input checked="" type="checkbox"/>  Out-sourcing delivery	<input type="checkbox"/>  Limited capacity
<input type="checkbox"/>  Separate business unit	<input type="checkbox"/>  Independent museum	<input type="checkbox"/>  Military museum
<input type="checkbox"/>  Multiple site service	<input type="checkbox"/>  Small museum	<input type="checkbox"/>  Local authority service

Context / Reason for Change

The National Football Museum was founded in Preston in 2001, based at Preston North End's ground at Deepdale. The Museum attracted over 100,000 visitors each year. Funding problems led to the Museum seeking a new location in 2009. The new National Football Museum opened in the centre of Manchester in July 2012. The new Museum attracts over 500,000 visitors each year.

With the current pressure on public funding, the Museum is reviewing how it delivers its services and how it can diversify its income streams. A new approach to Learning and Communities is now being developed led by the Head of Human Resources and Learning.

"The Museum team want to develop a more commercial approach to generating bookings from schools, streamlining costs and increasing income."

In early summer 2016 the Museum recruited a Learning and Communities Sales Coordinator which is a new post. This person will create a new learning strategy that focuses on audience development and a new delivery structure. The Museum team want to develop a more commercial approach to generating bookings from schools, streamlining costs and increasing income. The plan is to out-source the delivery of a schools programme, so that the Museum is only paying for delivery when it is needed. Performance of the programme will be measured against targets with monthly reports to monitor progress and explain variances.

The Head of Human Resources and Learning is working closely with the new postholder to support him to focus on understanding the needs of teachers and also of the wider strategic context of funders and stakeholders. The team are keen to support Manchester City Council's wider agendas around health and well-being, tackling obesity, active learning and skills development and feel well-placed to be able to develop new programmes to deliver against these priorities, which also chime with the Museum's collections.

This review represents major change for the organisation and its workforce and the management team recognise that it is difficult and challenging for the individuals involved. The changing financial environment means that the Museum has to rethink the way it is working to become more sustainable into the future.

Looking Forward

The new appointment has only just been made, so it is early days for the review to deliver its objectives of finding more sustainable ways of working. Some of the operational issues to address will soon be under way, with plans to establish an online booking system to make it easier for any group to book a session at any time, whilst also supplying management data to the team.

The Museum team are planning trips to other venues to learn and share ideas, with a trip to Eureka in Halifax to look at provision for early years, as well as look at issues of inclusion and diversity.

The team are keen to make sure that this more entrepreneurial approach is balanced against their objective to use football as a way to change people's lives. The aim is to develop a quality programme, by improving their understanding of what the audience wants and sourcing high quality delivery at a cost that can be offset by generated income.

Key Learning and Advice for Others

- Be open to new ideas and take inspiration from talking to and visiting other venues
- Accept that change is difficult and takes time
- Take some lessons from commercial practice but balance these alongside your own social values and mission



Photo Credit: Prescott Museum

CASE STUDY 6 multiple-site

vi) Barnsley Museums

Applicability for other Museums

<input checked="" type="checkbox"/>  New ways of working in light of financial cuts	<input type="checkbox"/>  Out-sourcing delivery	<input type="checkbox"/>  Limited capacity
<input checked="" type="checkbox"/>  Separate business unit	<input type="checkbox"/>  Independent museum	<input type="checkbox"/>  Military museum
<input type="checkbox"/>  Multiple site service	<input type="checkbox"/>  Small museum	<input checked="" type="checkbox"/>  Local authority service

Context / Reason for Change

Barnsley Museums is part of Barnsley Metropolitan Borough Council and manage five museums and heritage sites across the area. These include a watermill, heritage centre, art gallery and country house museum.

The formal learning programme has not been core-funded and was reliant on external funds and projects, such as Heritage Lottery Fund and then Arts Council England's Museums and Schools programme in recent years. When the HLF funds ended, the service was reduced to one themed primary school session at one of the five venues, providing just enough income to cover costs. Wary of this happening again, the museum service decided to look at future delivery options well before the current ACE funding ended, giving themselves more than two years to undertake a review and act upon it.

The innovative work that was being delivered through Museums and Schools funding gave an opportunity to test out new ideas and ways of working that could feed into future plans.

"The review recommended that the museum learning team establish a separate trading unit with children and young people as their main 'stakeholders'."

Activity

Barnsley Museums sought external advice and commissioned Heritage Learning Hull to develop a business plan. Hull is a similar socio-economic profile to Barnsley and having responded to similar needs for organisational change, the Heritage Learning Hull team were well placed to give advice.

This included an analysis of charges to cover costs and making the learning programmes fit for purpose. The team went on to develop 19 new primary school sessions across the five sites and built up a strong year-round family programme.

As part of the review process the Head of Learning spent time making sure that influencers and decision-makers were involved in one to one discussions and that clarity and honesty were key. The team found changing attitudes difficult, both their own and others. Knowing that you have to bring in your own salary and that time is money, means having a lean mindset. Meetings became shorter, systems quicker and being adept at selling the services became essential.

It was agreed that the learning team should 'make their case' to councillors and evidence their impact on the town and its communities. Wanting to create a more accessible version of the business plan, an advocacy document was developed in 2014 titled 'This is what we do' which pulled together key statistics as well as case studies with individuals who had benefited from the service. The advocacy targeted councillors and 'spoke their language' to show how the service delivered the council's priorities.

See https://issuu.com/barnsleymuseums/docs/barnsley_museums_-_this_is_what_we_

With a business plan developed, the team worked with Black Radley consultants on a shorter version, just 3-4 pages long (acknowledging that decision-makers want the key points and not to wade through a lengthy document). The review recommended that the Museum learning team establish a separate trading unit with children and young people as their main 'shareholders'. A written agreement with the museum service outlined their relationship with the Learning unit. The Learning team would deliver a programme within an agreed budget and targets such as increasing footfall and boosting secondary spend; the Museums side of the agreement is to make their collections and sites available. The Council approved the business plan and trading unit in 2015 and delivery began in April 2016.

Looking Forward

The Museums learning team is beginning its new life and beginning to develop and deliver new ways of working. The change is a big one for staff and managing this process within local authority systems has been a challenge. Discussing pricing and operational issues with museum colleagues and taking a business approach to the future has all meant working differently and will take some time to bed in.

The team is developing a joint teachers' panel with Yorkshire Sculpture Park created around potential shared opportunities for outdoor learning. As well as building on school bookings and family programmes the team has started to supply learning-based consultancy services to other organisations. They are using the experience built up over the last four years through the Museums and Schools programme to contribute to the learning provision of others, paying it forward in a sustainable way. Over one fifth of children who grow up in Barnsley do so in poverty, with a further 20% of local households just "one step away" from it. The team remains committed to local people and local schools and don't want to put the service financially out of reach of those that matter to them, so fundraising or public subsidy remains critical.

Key Learning and Advice for Others

- Don't wait for someone to ask you to review how you deliver your service when it has become urgent – take the initiative and start early
- Talk to others who have been in a similar situation and get external advice – some people listen more to outside experts; even if you're saying or thinking the same thing
- Gather your evidence, consider your impacts and tailor them to your audience to show how you can deliver their priorities and be taken seriously
- Make the most of your own skills & experiences
- Keep your values and mission at your core

CASE STUDY 7 small museum

vii) Lancashire Infantry Museum, Preston

Applicability for other Museums

<input type="checkbox"/>  New ways of working in light of financial cuts	<input checked="" type="checkbox"/>  Out-sourcing delivery	<input checked="" type="checkbox"/>  Limited capacity
<input type="checkbox"/>  Separate business unit	<input type="checkbox"/>  Independent museum	<input checked="" type="checkbox"/>  Military museum
<input type="checkbox"/>  Multiple site service	<input checked="" type="checkbox"/>  Small museum	<input type="checkbox"/>  Local authority service

Context / Reason for Change

Lancashire Infantry Museum is based at Fulwood Barracks, a couple of miles outside of Preston city centre and has one full-time Curator supplemented with a part-time Assistant Curator since November 2013, both supported by a team of volunteers.

The Museum has been part of the Preston Museums Group partnership since 2007, a group of five museums who have worked together on a number of different projects over that period including developing family programmes, marketing and a literacy programme for schools. The group are all under separate governance and consist of the Harris Museum and Art Gallery (managed by Preston City Council), the Museum of Lancashire (Lancashire County Council), the Infantry Museum (a regimental museum part-funded by the Ministry of Defence), the Ribble Steam Railway (an independent run by volunteers) and South Ribble Museum (funded by South Ribble Borough Council).

The Infantry Museum layout has a number of small rooms on the ground level with no space suitable for working with groups. With only one full-time member of staff, school visits have not been a priority though a handful of schools have visited each year with staff reacting to requests rather than proactively promoting the museum for schools.

In 2012 the Curator was invited to discussions about how the city would commemorate the First World War Centenary in an HLF-funded programme called 'Preston Remembers'. In discussing their collections, the museums in the city realised that by working together their collections could offer a broader picture of the First World War experience for a schools audience than any of them could do alone. However, the Infantry Museum still had to address the issue of space, lack of staff time to deliver sessions and lack of a relationship with teachers or expertise in marketing to schools.

Activity

The Infantry Museum Curator worked closely with the learning team at Lancashire County Council to develop a schools programme for 'Preston Remembers'. The Infantry Museum would tell the story of recruitment, based at the barracks and using their collection to tell personal stories from local recruits. The Museum of Lancashire would tell the story of the Home Front in Preston, as well as use the 'trench experience' interactive display to talk about the recruits' experiences in France. The programme could be used to offer a full day's programme for schools, meeting the needs of teachers who prefer a full day when hiring a coach to travel (making the expense of coach-hire worthwhile).

Lancashire County's Learning Team brought their knowledge and experience to develop the session plans, offered to promote the full programme using their existing marketing channels and teacher relationships, take the bookings and use their freelance team to deliver the sessions. They benefited from a stronger, full day's programme with the added 'wow' for schools of a visit to a working Barracks. This left the Infantry Museum Curator needing to solve the space issue to enable schools to use the Museum effectively.

The Curator secured a sustainability grant from the Museums Development NW team to develop a storeroom in the Museum into a flexible space that could be used by groups, including schools. With a grant of £6,000, the Museum team got stuck in, clearing and decorating the room with their volunteers. Recruitment posters from their collection were conserved ready to display on the walls, replica uniforms were bought, carpet and furniture all brought in to prepare the room for schools. The new First World War programme was ready for the 2013 school year and the shared arrangements with Lancashire County Museums team have worked very well. Over 6,000 pupils have visited the Infantry Museum in less than three years, a huge increase on the average of four or five schools visits per year beforehand.

Schools are charged for the session in line with other Lancashire County's charges. The County service takes the income in return for their costs in delivery (and the initial development of the sessions). The Infantry Museum pay £500 per year to be included in the County's 'Simply Schools' brochure mailed out to teachers and an online presence on the related website. In return, the Infantry Museum gets a massive increase in visitors, a higher profile in the city, return visits from children bringing their families and a flexible space that they use for meetings and other group work such as Cubs and Scouts who pay for sessions direct to the Infantry Museum.

Looking Forward

The Museum is now developing a shop to generate income from their increase in visitors. The relationship with Lancashire County's learning team has strengthened over this project and discussions about future collaborations continue. The principle of sharing delivery and development costs and knowledge is one that the Museum will replicate in other projects.

Key Learning and Advice for Others

- Developing a strong partnership can help across all areas of your work – be open and flexible, discuss all sorts of ideas, assess the risk and then 'give it a go'
- Developing trust with your partners is vital and needs an investment of time – go and see how they do things for yourself to be sure it's the quality you're after, be open and honest and make sure you reciprocate
- If you don't have the resources to compete with another provider, be proactive. Spot a gap or an opportunity in their offer, see what you can contribute and work with them to improve both your offers
- If you can't do everything yourself, know when, who and what to ask for support in

CASE STUDY 8 out-sourcing delivery

viii) Prescott Museum, Knowsley

Applicability for other Museums

<input type="checkbox"/>  New ways of working in light of financial cuts	<input checked="" type="checkbox"/>  Out-sourcing delivery	<input checked="" type="checkbox"/>  Limited capacity
<input type="checkbox"/>  Separate business unit	<input type="checkbox"/>  Independent museum	<input type="checkbox"/>  Military museum
<input type="checkbox"/>  Multiple site service	<input checked="" type="checkbox"/>  Small museum	<input checked="" type="checkbox"/>  Local authority service

Context / Reason for Change

Knowsley Borough Council manages three arts/heritage venues – Prescott Museum, Huyton Gallery and Kirkby Gallery. In 2011/12, the Council made the decision to co-locate a number of services into one building so as to pro-actively save money through keeping the respective services but only utilising one building. So in April 2012, Prescott Museum moved to Prescott Indoor Shopping Centre, alongside the library and Council One-Stop Shop. At the same time, one of the 3.5-person team was made redundant and the time was right to review the services and programmes they could provide from their new location with two staff working across three venues.

Prescott Museum had delivered a popular Living History outreach programme for schools (Primary) for many years, using casual/freelance staff to deliver sessions up to this point. The sessions had been largely delivered by actors but required significant staff time to check freelancers' availability as well as taking school bookings.

The Museum team wanted to continue to deliver a service for schools across the Borough which has areas of high deprivation and low levels of art and heritage engagement amongst adults. The move to the Shopping Centre had brought in new audiences to Prescott Museum and the team wanted to continue to identify new ideas for delivery.

It was agreed that the Big Heritage team would deliver sessions in primary schools, developing these with the Museum team and that they would take on the bookings and administration for the programme.

Activity

As part of Prescott Museum's accreditation, the team leader is mentored by a member of staff at the World Museum Liverpool. The mentoring relationship generated ideas about how formal learning could be delivered in future. Cheshire-based social enterprise Big Heritage was suggested as a source for quality workshop facilitators and the team leader met with them to discuss ideas. It was agreed that the Big Heritage team would deliver sessions in primary schools, developing these with the Museum team and that they would take on the bookings and admin of the programme. This would free up the Museum team to prioritise other service areas. Before the final decision was made, the Museum team observed a lot of the sessions that Big Heritage delivered, across a range of content and with regular bookers, new bookers and special schools. The team wanted to be certain of the quality of provision across the board and to feel confident that this would be consistently delivered. A rapport was built with the Big Heritage Director who shares the priority to develop a well-researched accurate programme that delivers against teacher-needs.

The financial model was agreed, with Big Heritage taking 100% of income to cover their costs, with the Museum team continuing to deliver the marketing material as their only cost. The Museum team set fee levels to begin with, in line with previous charges, but these were negotiated upwards as the real costs of development time and delivery for Big Heritage became apparent in the first year. The level of bookings from schools has stayed at a level with around 30-50 school bookings in a year.

At the moment, there is no formal contract between the partners who feel that the level of trust they have developed and the commitment from Big Heritage to meet the Council's requirements for procurement negates the need.

Looking Forward

The arrangement has worked well for Knowsley and the team will continue to review and build upon the positive relationship they have developed with Big Heritage as a service provider. Six-monthly review meetings are in place and the next will discuss how to ensure that the marketing material accurately reflects the programme and how to build on the programme.

The partnership is developing all the time, with Big Heritage now getting involved in informal learning events for families and acting as strong advocates for museum learning across the Borough. Big Heritage is taking on more delivery staff to keep up with demand, with the Museum supporting this small business to thrive.

The small team managing the museums are now freed up from spending time taking bookings and managing freelancers to deliver in the knowledge that schools value the programme that is being delivered at a high quality with plenty of repeat bookings and good feedback from teachers.

Key Learning and Advice for Others

- Get advice from other people, ask around for recommended suppliers
- Make sure you are happy with the quality of provision – sit in on a number of different sessions to be sure they are consistent
- Consider all ideas to support you to deliver a service you believe in
- Keep it simple, avoid over-complicating with red-tape
- Make sure you have trust in the delivery organisation, spend time developing the relationship

CASE STUDY 9

limited capacity

ix) Lakeland Arts, part of Cumbria Museums Consortium

Applicability for other Museums

<input type="checkbox"/>  New ways of working in light of financial cuts	<input type="checkbox"/>  Out-sourcing delivery	<input type="checkbox"/>  Limited capacity
<input type="checkbox"/>  Separate business unit	<input checked="" type="checkbox"/>  Independent museum	<input type="checkbox"/>  Military museum
<input checked="" type="checkbox"/>  Multiple site service	<input type="checkbox"/>  Small museum	<input type="checkbox"/>  Local authority service

Context / Reason for Change

Lakeland Arts is an independent organisation that manages three (soon to be four) heritage and arts venues in the Lake District (Abbot Hall Gallery, the Museum of Lakeland Life and Industry, Blackwell and the new Windermere Jetty, Museum of Boats, Steam and Stories to be opened in 2017). The organisation is one of three who form the Cumbria Museums Consortium (alongside Tullie House in Carlisle and the Wordsworth Trust in Grasmere). The Consortium is one of the Arts Council England Major Partner Museums.

The formal learning service at Lakeland Arts is still relatively new. The service has grown from one member of staff three years ago to four staff today, with a fifth to be appointed in the next 12 months. It attracts around 2,500 pupils annually to its on-site programme across its three sites. The team have tested different ways of delivering formal learning over that period, and with a new venue going to be open next year, they felt the time was right to review their work. The other members of the Cumbria Museums Consortium were also at a point in their plans where they wanted to investigate how to deliver formal learning in a sustainable way.

Activity

Funding of £15,000 was identified within the Consortium's MPM grant to commission external consultants to look at their work with children and young people with an emphasis on formal learning. The objectives of the work are to:

- Improve the communication of the learning offer at the museums and galleries
- Develop and implement a strategy to increase school aged pupil engagement at the venues
- Work with museums and learning providers to increase the number of school aged pupils engaging with Arts Award

The brief was put out to tender in spring 2016 and Heritage Learning (the museum service in Lancashire) were appointed to deliver, initially for one year with a potential extension to two. Starting in May 2016, Heritage Learning is drawing on its experience of developing relationships with teachers and of what has worked in Lancashire, to develop new programmes and ways of working for the Cumbria Museums Consortium and other museums in the county. They have begun by gathering information about the customers, looking at which schools are booking now, which are not, and trying to understand booking patterns.

They are also trying to identify barriers to booking so that they can talk to teachers about how such barriers might be addressed. The team will also review the formal learning programmes across the different venues, investigating what are they offering, the quality of the offer, how is it delivered and how is it marketed. The levels of charging and the booking procedures will also be reviewed.

Each venue in the Consortium has the opportunity to test out different ideas and to share the findings across the group. The review will identify the potential for joint working – maybe in programmes, in delivery, in marketing, in bookings – as well as areas of specialism and differentiation.

“Heritage Learning is drawing on its experience of developing relationships with teachers and of what has worked in Lancashire, to develop new programmes and ways of working for the Cumbria Museums Consortium and other museums in the county.”

Looking Forward

For Lakeland Arts, the review is an opportunity to build a sustainable formal learning service. To them this means a service based on two-way productive relationships with teachers and also about making best use of their own capacity (in terms of venues, spaces and staff). Whilst the team do have quantitative targets each year to steadily increase the number of pupils they work with, the Head of Learning sees the future as being about a steady number of schools benefiting from a high quality service, making best use of staff and venue capacity and embedding a programme that centres on the permanent collection and is punctuated by temporary exhibitions. They want to move away from chasing bookings to rely more on a quality offer that is positively communicated to teachers.

Key Learning and Advice for Others

- Understand your audience first, their needs and preferences and then develop your programme and service and use targeted communications to promote it to them
- Collect and analyse your data to understand who uses your service now before you start to make changes
- Get your marketing team on-board to test out new ideas and bring their expertise to support you in your communications with teachers
- Change to any service involves understanding your organisation's culture
- Think about what success means to you

5. What should we be asking ourselves?

How can you use some of the ideas from the case study examples in your own organisation?

As we've said already, there is no perfect model that works for everyone. But there are some key questions you can ask of yourselves to stimulate your own review of practice.

The starting point for everyone we spoke to in this study was to consider what your priorities are, what are your ambitions, what do you want to achieve? For most organisations, this comes back to mission, values and business objectives. Is learning actually mentioned in your core objectives? This reflects the priority given to learning within your organisation.

How important is formal learning to your organisation?

For some, the question of 'how do we deliver a more sustainable formal learning programme' is prompted by a need to find savings either urgently or in the longer-term. It may prompt a need to consider different ways of delivering your programmes. Where to start? What are the options?

Consider your organisation's structure and where learning sits within it.

In talking to people across the sector for this study we have identified a number of different ways to deliver formal learning. The key point is that there is no 'one size fits all', no perfect model that works for everyone. Each case is different. We can't provide an exhaustive list because there are so many variations. What we can do is give you some options to act as a catalyst for you to consider the possibilities open to you.

The options identified around structure should be relevant whether your museum is currently Local Authority-run, an independent, in a University, or regimental museum.



Photo Credit: Northampton Sessions House, NCCL, Public Legal Education Syndicates

The examples quoted below are all explored in detail within the case studies.

Separate business unit

- Separate governance model - may be a social enterprise
- Generates income to cover all costs (full cost recovery)
- Partnership agreement with museum to use collections and buildings for delivery of learning programmes
- May purely develop content and programmes for others to deliver with a written agreement
- Not constrained by museum governance restrictions
- Commissioned by museums to deliver learning programmes
- e.g. Heritage Learning in Hull, Barnsley Museums Learning, National Centre for Citizenship and the Law in Nottingham

Learning and museum are separate units within shared governance structure

- Shared governance model
- Ring-fences income to cover core costs (staffing, equipment)
- May have some overheads met by LA (eg. building, utilities, central services such as IT and HR)
- May purely develop content and programmes for others to deliver or do both under a written agreement
- e.g. Lancashire County Council

Learning team part of museum team

- Shared governance, responsibilities and knowledge
- Income goes into general museum 'pot' with no ring-fencing against learning costs
- Responsible for developing content and delivering it
- e.g. Tyne and Wear Museums

5. Cont... What should we be asking ourselves?

What are the different ways available to museums in delivering formal learning?

These might be dictated by governance – whether the learning team are responsible for direct delivery of workshops or not – or by budget, space or staffing constraints.

Delivery

Questions around who delivers your programme can explore:

- Do you offer facilitated sessions such as workshops, or just support teachers to deliver their own self-led visits?
- Do your core team deliver the facilitated sessions, or is this done by freelancers, casual staff, or volunteers?
- Is there an opportunity for your sessions to be wholly or partly delivered by a partner – be it another museum, another learning service, or other specialist providers such as healthcare providers or STEM (Science, Technology, Engineering and Maths) specialists?
- Following on the point above, can you team up to deliver part of a programme at your venue and part at a partner venue to offer more content, variety and a full day out for schools?

Programme

Take a good objective look at your formal learning programme. Does your programme meet the needs of your customers (existing and potential ones) and does it make the best of your own resources (staff knowledge and experience, collections, buildings and spaces)?

The basic building blocks of most formal learning programmes are usually:

- Facilitated / taught sessions or workshops linked to the National Curriculum delivered in your museum venue (some museums deliver these using their own salaried staff, others contract freelancers to deliver booked sessions, some use volunteers, others contract artists)
- Outreach sessions taught by museum staff or contracted freelancers/volunteers/artists in a school
- Loan boxes or resources borrowed by a school for a set period of time
- Self-led visits to the museum led by the teacher, often supported by museum resources such as trails and worksheets
- Pre- or post-visit resources for teachers which may be online or physically sent out
- Continuous Professional Development (CPD) events and activities for teachers organised by the museum
- Opportunities for schools to hold their own INSET or training days at the museum



In addition to these, many museums are also working on wider formal learning programmes such as:

- Project-based cross-curricular work with schools that may involve a number of visits to the museum and by museum staff to the school, often resulting in new resources for others to use, or in performances or artworks, or in mini-museums at the school
- Offering Arts Award as an accredited acknowledgement of new skills and experiences over a project
- Summer schools, after-school clubs, sleep-overs, take-overs
- Working with Initial Teacher Training (ITT) providers and Teaching Schools to embed the use of museums in teaching
- Themed activities over a week for schools to book, e.g. special events weeks that usually focus on a particular theme, often linked directly to the National Curriculum
- Creative sessions for teachers out-of-hours to inspire new ways of working with collections, for example Lancashire Museums booked author Lauren Child to deliver a talk on visual literacy for teachers as part of her national book tour (so free of charge to the service)

- Using museums as the base for non-museum teaching, more as a creative place for children to be and to widen experiences, for example the Haworth Art Gallery in Accrington host a local special school GCSE Art class every Friday
- Enquiry-based sessions to develop wider skills
- Sessions to develop soft skills such as working in a team, or developing confidence, often with special schools
- Working directly with artists and creatives or STEM experts to widen experiences and aspirations
- Offering volunteering and participation opportunities to pupils either within or outside of school hours, again to broaden their experience and aspirations, for instance as members of Youth Boards or advisory groups, or developing their own programmes or marketing ideas, perhaps for national events such as Kids Takeover Day² or Museums at Night³

Give yourself some time to research what others are offering, speak to them about how it is working, go and visit to see for yourself. Most importantly, talk to your customers, your audience and your users.

² <http://kidsinmuseums.org.uk/takeoverday/>

³ <http://museumsatnight.org.uk/>

⁴ <http://www.museumsassociation.org/news/24072012-ace-museums-and-schools-programme>



Audience knowledge

Who is your audience and what do you know about them?

If you were asked about who books your current learning programmes, how detailed would your answer be? Do you know the total number of schools who book, who are the repeat bookers, who came once and never came back? Do you know how far schools travel to visit, where the hot-spots and cold-spots are? Which sessions are most popular, are they any that are never booked (and why do you keep them in the programme)?

Just as importantly, do you know what stops teachers booking with you? What are the barriers? What would encourage teachers to book, why do they go elsewhere, what are they struggling to teach that you could help them with?

There are many ways to find all of this out. It could be that you run a consultation programme every couple of years, inviting teachers who do book and some who need persuading, to a discussion, perhaps linked to an event to tempt them to spare their time.

You might do this informally, chatting to teachers at events, or go to other venues and ask to talk to their school bookers to find out why they visit them and not you. You might use a questionnaire or add a couple of questions to your feedback forms with existing schools to find out what their priorities are for the next year and how you might be able to support them.

The Pennine Lancashire Museums Group received Department of Education funding for the Museums and Schools programme⁴ from Arts Council England and used some of this to pay for teacher time to work with the museums to develop content for new museum sessions and to map existing schools programmes against the new National Curriculum. At the Whitworth Art Gallery, the Head of Learning found herself chatting to a Headteacher at an informal event and followed this up with a meeting as both realised that they could support each other and wanted to find some creative ways of doing so.

The result has been a year-long programme of work between Gallery and school above and beyond formal sessions and outreach.

Management information

What do we need to know?

Most learning teams have some form of annual targets. Often these are led by the quantitative – how many bookings in a year – and backed up with some element of quality, often based on satisfaction levels from teachers who book sessions. Increasingly museums are setting income generation targets for their formal learning work, which aim for a certain level of income to be achieved through school bookings each year.

The complexities within these targets are often missed by decision-makers. Booking levels cannot increase ad infinitum if your offer is based around taught sessions in one classroom space. There are only so many sessions available to be booked within each academic year. Work out your maximum capacity and make sure you're not asked to deliver beyond this level. Measuring satisfaction levels is not always meaningful if they don't take account of expectations levels as well. A quick check at the start of a session (or when a teacher books) about what they are expecting or hoping for, and then a check against these expectations at the end of a session (on a feedback form) can give meaningful insight that you can act upon. Isn't that more useful than a constant 95% satisfaction rating which gives you little room to improve?

Are you aware of what proportion of the total number of visits to your museum are made up by school visits? Is this reflected in the way you organise your resources? For instance at Manchester Jewish Museum, school visits at their peak have made up over 60% of total visits and are an essential element of the new business plan being developed. Similarly, if schools represent a majority or large proportion of your total visits, what proportion of your marketing spend (and time) is spent targeting schools? In fact do your marketing team spend time on this, or is it the learning team who lead on communications with teachers? Are you making the best use of your team's experience in the way you deliver your communications?

Do you know which elements of your programme give you the best financial return? If your capacity is limited (by either space or people to deliver) yet you are still pushed to increase your reach, should you be prioritising elements that can extend capacity – like self-led sessions, loan boxes, outreach and delivery in other venues, online resources and virtual classrooms?

And how do you measure financial return against other outcomes? Do you consider the balance between 'cash cows' within your programme (popular workshops or resources that are booked frequently and bring in income yet cost you little to deliver) with 'loss leaders' that could prove innovative ideas for the future, are subsidised with external funding, or deliver social outcomes that are a priority to you?



5. Cont... What should we be asking ourselves?

Income generation

What should we consider around charging for programmes and generating income?

Museums differ in whether they charge for formal learning. Some believe that access should be free, but many are reviewing this in light of challenging financial environments and the need to identify areas to generate income from across all of their activities to balance the costs that cannot be shaved any closer.

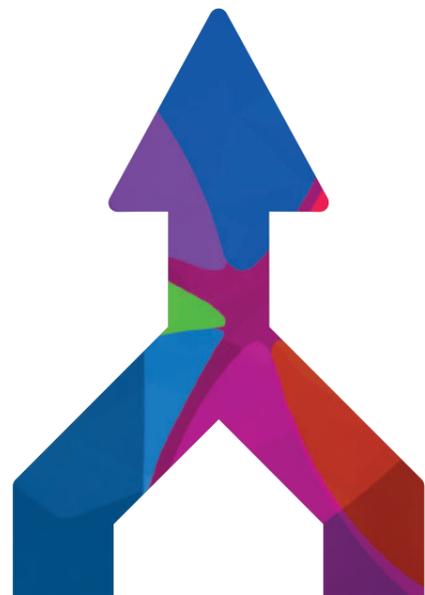
Setting charges for services needs to include some scanning of the horizon. What can the market take? What do other organisations charge for similar services? Don't stick just to other museums, think about wider learning outside the classroom visits that schools make. What can you learn from beyond this market - consider discounts for frequent bookers, membership schemes that bring income up-front and offer benefits of value to members, incentives to book early.

What is your target for this income? What are your capacity levels? Calculate the maximum number of sessions (and therefore pupils) you can deliver given your spaces and staffing. Don't give yourself a target above this unless you can raise your capacity too. Can you invest in some areas now to increase your return in the future (e.g. IT equipment to deliver virtual classroom sessions; using a grant to develop external resources that will last long term)?

You may be asked by your funder to explore the potential for 'full cost recovery' of your learning service or programmes. This phrase is used increasingly but without a consistently-shared definition of what it means. Some museums consider that they operate their formal learning to deliver 'full cost recovery' by which they mean that the income they generate from schools covers the delivery costs of the freelancers they employ to teach the sessions. In this case, the full costs are only the direct delivery costs – they are not considering all the overhead costs of the time spent by staff taking bookings, the cost of marketing to schools, the costs in maintaining and running the building they use, etc.

Full cost recovery could include a set proportion of overhead costs, calculated on the basis of the proportion of time spent by staff outside of delivery and a proportion of the opening hours and rooms in the building given over to use by schools.

But this can often be a red herring depending on what has motivated the need to calculate the cost. Some argue that if a museum is open to the general public anyway, why include maintenance costs in calculating the full costs of delivering schools programmes. If you are developing a business case to establish a separate trading unit for formal learning (as in a number of the case studies in this report) these costs may well need to be discussed and negotiated.



Evaluation and quality frameworks

What should we be measuring and evaluating?

Firstly, think about what is motivating your evaluation. Are you doing it to help you to make improvements to your service and programmes; or to understand how you have changed over time to identify trends to help you to plan for the future; or perhaps to gather evidence for an external funder; or more to help you to in advocacy to build a case for support from stakeholders. You might be motivated by all of these factors.

Secondly, evaluation needs to start from an understanding of your objectives – what is it that you want to measure? Don't measure and evaluate anything and everything. Data can be a dangerous thing – it might be interesting to know the percentage of your school bookings that come from a different town, but unless you are going to act upon that knowledge, it's not an effective use of your time to analyse this.

Starting from your objectives you should be prioritising analysing information and data that means something to you, that you can act upon and do something about. For instance you might have an objective to increase repeat bookings from local schools, or to deliver programmes that meet the needs of Key Stage Three teachers of STEM subjects. In this case, it is meaningful to analyse where bookings come from and to hold a discussion specifically with KS3 STEM subject teachers.

This enables you to decide what method to use to gather your data and from whom, as well as helping you decide how often to measure. Your evaluation or quality framework will build upon these elements to give a structure to your evaluation activity.

There are numerous evaluation and quality frameworks that are used across the sector, including

- Inspiring Learning for All's Generic Learning Outcomes (GLOs) and Generic Social Outcomes (GSOs)
- Arts Council England's Quality Principles
- Learning Outside the Classroom's indicators
- Sandford Award criteria

A number of museum teams are now developing their own quality frameworks. Tyne and Wear Archives and Museums are developing their 'How good can we be' framework using the ACE quality principles as a catalyst for discussions around how to set their own measures.

Measuring the quality of your own service can be troublesome. TWAM decided to use a peer review to support their process, identifying Leeds City Museums as being of a similar nature in terms of an urban multiple-site service across many different collection areas and venue-types (historic sites as well as traditional museum buildings). Asking other services to give you an objective viewpoint of your own delivery can be hugely insightful. Others use 'mystery shoppers' to review services, sometimes using volunteers or advisory groups from other museums to give their viewpoints.

5. Cont... What should we be asking ourselves?



Photo Credit: NCCL Galleries of Justice Museum object handling

New ways of working – towards sustainable practice

When did you last try doing something differently?

If you – and your organisation – are risk-averse, can you take a small step towards changing something, testing out a new idea, to see if it can improve the way you work and make your formal learning practice more sustainable?

Are there different ways of working to explore? Every organisation has its own culture, its own way of working that is usually passed along from person to person. We know what we think works for us and we often stick with it until something forces us to change. This is natural, but doesn't make for long-term sustainability.

Successful organisations regularly review their practice. Targets or indicators are set that help them to identify areas that need a tweak or a major change, instead of just confirming that normal practice can continue (like an annual satisfaction level of 95% that never waivers so nothing changes). Let's face it, no-one has got everything right and there is always something that can be improved, whether it's the time you take to answer the bookings line, your programme mix, your level of repeat bookings, the way you gather feedback, or your pricing policy.

You might want to move from being led by outputs (e.g. number of bookings, number of schools, number of website hits) towards thinking more about measuring the impact your work has on people or communities. You might be starting to consider being more outward-facing, being pre-emptive before the need to make changes is forced upon you. Do you want to involve your audience more in your work, increase participation levels, establish advisory groups, or encourage new volunteers?

Look at the characteristics and practices of other sustainable organisations. A starting point for looking at different ways of working might be talking to other people, both inside and beyond your own organisation. Do some research, look at examples of how other organisations work, read case-studies, go to conferences and seminars to hear people talk about their work. What do your stakeholders and funders want from your organisation? Most of all think creatively about how you can achieve your mission and values.

Next steps and pointers

Within the appendix to this report we've given you some pointers to more information and some quick tips, as well as an audit to encourage you to review your programmes. We hope that these and the case studies encourage you to get on the phone, go online, or go out and visit some other venues to find out how they are working towards sustainable practice. Above all, talk to others and share ideas.

It is only by combining our knowledge and experience that we can move forward as a sector and ensure that we continue to achieve powerful learning outcomes with our work and collections. Our shared aim is to continue to give young people access to our collections and sites in a way that increases their understanding of our world and inspires a stewardship of our rich cultural heritage.



Photo Credit: Northampton Sessions House, NCCL, Public Legal Education Syndicates



APPENDICES

A. Resources and further information.

CapelUK report for ACE available late summer 2016

Association of Independent Museums website with resources and publications for support, e.g. AIM Research Study on 'Successful Practice' on organisational resilience, Black Radley; AIM 'Hallmarks of Prospering Museums' 2015 www.aim-museums.co.uk

Mark Robinson 'Making Adaptive Resilience Real', Arts Council England July 2010

BOP Consulting 'Heritage Organisations and Resilience' for English Heritage and HLF, 2012

Derby Museums Guide to Human-Centred Design www.derbymuseums.org/hcd/#.V3D0pY-cG01

'Futureproof Museums' programme is an intensive strategic change programme for 20 museums funded by Arts Council England in 2015 and delivered by the Arts Marketing Association

www.a-m-a.co.uk/learn/training/long-term-programmes/futureproof/

Culture Hive - source of case studies and guides to all things audience-related

- e.g. 'Introducing the Business Model Canvas' by Mark Robinson of Thinking Practice & Sara Lock, AMA www.culturehive.co.uk

Group for Education in Museums list of resources, case studies, advice notes and guides www.gem.org.uk/res/res_menu.php

Museums Development North West website museumdevelopmentnorthwest.wordpress.com

Curious Minds website www.curiousminds.org.uk

Arts Awards for museums and heritage www.artsaward.org.uk/site/?id=2471

More information on the Boston Matrix to consider your product mix - www.tutor2u.net/business/reference/boston-matrix-and-product-portfolios

Nina Simon "The Participatory Museum", published 2010, and "The Art of Relevance", published 2016 and blog museumtwo.blogspot.co.uk

B. Quick tips

The workshop with museum teams identified a number of potential scenarios that many of the teams were facing and the activities during the day saw us collect tips and ideas that could be tried to address each scenario. What follows details this discussion and includes reference to the case studies and wider discussions in brackets. Of course many of the scenarios overlap and inter-connect and you may find yourself facing them all.

Scenario 1 – finding time for reflection and improvement

- Prioritise evaluation (TWAM)
- Start from your objectives
- Discuss what quality means and how to measure it (TWAM)
- Involve your users (Whitworth Art Gallery)
- Analyse and use management data (Lancashire County Museums, TWAM, Hull Heritage Learning)
- Mix qualitative and quantitative info – outputs and outcomes (TWAM)
- Find a trusted partner to undertake a peer review of your service (TWAM)
- Make sure you have an exit strategy well in advance of funding ending

Scenario 2 – you need to increase capacity, i.e. number of users

- Develop freelancers or volunteers to deliver more sessions
- Increase self-led visits
- Develop loans and outreach (Prescot)
- Look at using virtual classrooms
- Deliver in another venue (NCCL)
- Increase the area or number of your delivery spaces (Lancashire Infantry Museum)
- Get an external agency to deliver for you (Prescot, Lancashire Infantry Museum)

Scenario 3 – you need to cut costs and increase income

- See points above – increase capacity, diversify income streams
- Take time to analyse your costs and income levels – what does each session cost to deliver, how much income does it bring in – is there any profit margin and can you increase it?
- Review your charges in context of other similar offers
- Review whether you charge per head or per class – which brings in most income?
- Cut programme areas with high costs and limited income and instead push the higher profit margin activity
- Cross-sell your programme (TWAM)
- Sell space in your marketing material (Lancashire Museum Service)
- Introduce a membership scheme with incentives (TWAM, Hull)
- Increase bookings – see next point

APPENDICES . . . cont



Scenario 4 – you need to increase bookings to increase income

- Make the links between your programme and the National Curriculum and school improvement priorities explicit in your communications
- Be proactive, upsell, offer discounts for multiple bookings and early-birds (TWAM)
- Offer to pay for teachers to work with you on programme (Pennine Lancashire Museums)
- Increase booking hours (explore online bookings)
- Develop relationships with teachers – invite them to your events, go to theirs, encourage recommendations
- Update your mailing list names and details regularly (at least annually)
- Get teachers to review your marketing materials
- Find your unique selling point or a gap in the market you can fill (NCCL)
- Target the Business Manager in schools (NCCL)
- Analyse your bookings – identify hotspots, coldspots, lapsed bookers – then target them
- Develop close relationship with local schools (Manchester Jewish Museum, Blackburn Museums)
- Work with partners to offer a full day out for schools with linked programmes (Lancashire Infantry Museum)
- Negotiate discounted coach travel or subsidise through project bids (NCCL)

C. Audit of Formal Learning Programmes

To encourage you to review your programmes and service, this audit poses some questions for you to work through. You might want to work on it with others within your team, or someone from outside of the organisation to bring a neutral view.

1. Programme

What do you offer in your formal learning programme?

Offer	Yes/No	Would like to develop	Notes
facilitated sessions linked to the National Curriculum delivered in your venue			
outreach sessions taught by museum staff/ volunteers/freelancers in schools			
loan boxes borrowed by schools for a set period			
self-led visits to the museum led by teachers			
pre- or post-visit resources for teachers			
Continuous Professional Development events for teachers			
opportunities for schools to hold INSET days or training days at the museum			
project-based cross-curricular work with schools			
Arts Award or other accredited programmes			
summer schools, sleepovers, after-school clubs, takeovers			
working with Initial Teacher Training providers or 'Teaching Schools'			
themed activities over a week / similar			
sessions delivered by artists or STEM specialists			
volunteering or participation opportunities for young people			
schools using the venue for non-museum/ gallery teaching			
other.....			

APPENDICES . . . cont

2. Bookings

- i) How many pupils visit each year?
- ii) How many schools book each year?
- iii) What proportion of school bookings are repeat bookings and what proportion are coming for the first time?
- iv) What proportion of your total museum visits do schools represent?
- v) What is the trend for your booking levels over recent years?

3. Money

- i) How many different sources of income do you have for your formal learning programme?
- ii) How did you calculate your charges? Do you charge per head or by class? Which method brings you most profit?
- iii) Do you know what other museums nearby charge?
- iv) Which aspects of your programme bring in the most income – specify where possible, e.g. which workshop / resource / event.
- v) Do you know which elements of your programme have the best profit margins? (i.e. those where your costs to deliver are best off-set by the income you take)

4. Audience knowledge

- i) Do you have opportunities for teachers to feed in ideas and advice to you about the programme?
- ii) How often do you talk to teachers who have not booked about why they are not coming?

5. Monitoring and evaluation

- i) What targets or performance indicators do you work towards? Quantitative and / or qualitative?
- ii) Are there opportunities for the delivery and development team to reflect on what is working well, what is not and how to improve?
- iii) How do you assess the quality of your programme? Do you use a quality framework?

6. Governance and advocacy

- i) Do you know what your leadership team/ Trustees / Board members / Councillors most want to hear about from your work? Do you keep them up to date with what you're achieving?
- ii) Where does learning sit within your organisation's priorities? Is it mentioned in your mission or strategic aims?

What does this analysis mean to you? Can you identify areas that you need to work on, or that you need more information to answer?

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