An Inquiry Report of the:

Economy & Culture Scrutiny Committee

MUSEUM OF CARDIFF

July 2023

Cardiff Council

CONTENTS

FOREWORD

The pressures facing local authorities are unprecedented; post pandemic service demand coupled with economic uncertainties and the impact of the cost-of-living crisis on local authorities mean Cardiff Council is having to maximise its budget spending ever more closely. The Council spends circa £500,000 per annum on the Museum of Cardiff. At times like these, it is important to question the effectiveness of this spend, to understand if it is delivering value for residents and taxpayers, and to explore whether the budget allocation can be optimised, so that the needs of the museum are balanced with the need to fund statutory frontline services.

I am grateful to all those who gave their time to this Inquiry, including the expert stakeholders, Museum staff, Development Trustees and volunteers; we benefitted from your expertise and experience, helping us to understand what is needed to secure the future of the Museum.

I am also grateful to those interested in the future of the Museum who gave evidence to the Inquiry; your views on the importance of Cardiff having a museum that tells the stories of all its communities reaffirmed the important role good museums play in the economy, culture, education and leisure offer of a city as well as in promoting social cohesion.

Reflecting on the Museum of Cardiff's journey to date is essential to understanding the best way forward; we need to address the barriers that have hampered the Museum's development. Our recommendations aim to assist this by strengthening strategic and financial planning to give direction, emphasising the need for a new location to provide temporary exhibition and income generation spaces, with good footfall, and ensuring the Museum is staffed appropriately.

It is also important the Museum is accessible and inclusive for all communities in Cardiff and so some of our recommendations focus on boosting inclusivity and representativeness and assisting participation via outreach work.

The Museum of Cardiff has huge support, both from museum experts, local stakeholders and the communities that have been engaged; we can harness this to build on its success and ensure its future.

Finally, many thanks to Councillor Henshaw, Councillor Shimmin and Councillor Thompson for their commitment to completing this Inquiry in record time to enable our findings and recommendations to feed into the Working Party.

**Councillor Peter Wong
Chair, Economy & Culture Scrutiny Committee
July 2023**

TERMS OF REFERENCE

1. To gather stakeholders' views and learn from their knowledge and experience of council-run and/ or charitable trust museums regarding:

    a. Funding models

    b. Income generation

    c. Governance models

    d. Community engagement

    e. Volunteering

    f. Inclusivity and representativeness

    g. Partnership working

    h. Staffing structures.

2. To explore with stakeholders the main requirements to ensure a sustainable location and future for the Museum of Cardiff, including identifying likely issues associated with relocation and reprovision.

3. To understand the Council's spend on the Museum of Cardiff, the income of the Museum of Cardiff and whether there are any conditions attached to previous funding provision.

4. To use the information gathered during the Inquiry to make evidence-based recommendations to Cabinet regarding how best to achieve a sustainable future for the Museum of Cardiff.

CONTEXT FOR INQUIRY

a. This Inquiry is taking place following the 2023/24 budgetary process, where the Council consulted on a proposal to either take the Museum of Cardiff out of its current location in the Old Library and make it a mobile attraction, delivering savings of £266,000 per year and allowing '*the Council to re-open the museum in a permanent home in the future, if a suitable location was found, and funding secured'* or to keep the Museum open in the Old Library and find the savings elsewhere.

b. The proposals were strongly opposed by museum and heritage sector bodies, including the Museum Association and the Federation of Museums and Art Galleries of Wales, who worked with local community groups in an advocacy campaign to highlight their concerns.

c. More than half (57.1%) of respondents to the Council's budget consultation supported the proposal to make the Museum of Cardiff a mobile attraction. However, the advocacy campaign highlighted that moving to a mobile attraction would lead to the Museum of Cardiff losing its accreditation status, meaning that it would lose funding and that existing funding would be clawed back.

d. Having considered the consultation responses, Cabinet decided not to take forward the mobile attraction proposal, stating it would work with the Development Trustees of the museum to secure a sustainable future, including consideration of options for delivering the service at an alternative location.

e. A spokesman for the Development Trust of the museum said:

"*We will now undertake a detailed examination of the best way to ensure a stable future for the museum.*

"*This will be conducted by a working party of the authority's officials and trustees with formal terms of reference.*

"*The working party will review the museum's long-term finances and the possibility of moving to alternative permanent sites.*"[1]

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[1] [Cardiff Council U-turns on plans to make Story Museum mobile - BBC News](#)

HEADLINE FINDINGS

HF1. The current position is not tenable due to the costs of operating from the Old Library, the lack of space for income generation activities, and the increasing pressures on the Council's budgets.

HF2. There is now a real opportunity to plan for a sustainable future for the Museum of Cardiff, retaining its focus on telling the stories of the people of Cardiff whilst boosting footfall, outreach, inclusivity and representativeness.

HF3. Any new location must provide security of tenure, income generation opportunities, meet the museum Accreditation Scheme criteria, be supported by existing funders, and enable future funding bids to be made.

HF4. The Museum of Cardiff is highly regarded, with many stakeholders keen to engage to help shape its future. Involving stakeholders, including those with museum expertise and local communities, in discussions on the way forward would be beneficial.

HF5. The Council has an opportunity to reposition its relationship with the Museum of Cardiff by raising its profile, realising its potential and linking the Museum into the wider work of the Council, including cultural activities, educational activities, volunteering opportunities, partnership working and wider economic activity such as tourism and events.

KEY FINDINGS

KF1. Museums that effectively represent their place and communities are of value and have an important place in the ecology of the cultural offer. Welsh Government is developing a Cultural Strategy that includes museums; Cardiff Council needs to ensure its Cultural Strategy also includes museums.

Current Position

KF2. The Inquiry heard from stakeholders – professionals, visitors and schools – that the Museum of Cardiff is held in high regard for the good work it does; this is reflected in the national awards it has won.

KF3. Cardiff Council's annual budget for the Museum of Cardiff is circa £513K per annum, which includes a contribution towards the running costs of the Old Library. In addition, the Council has a separate repairs and maintenance budget for the Old Library; the Royal Welsh College of Music and Drama will take on responsibility for these costs as it has leased the building.

KF4. The Royal Welsh College of Music and Drama has confirmed the Museum of Cardiff will have a lease for up to 5 year; during this time, it will continue to contribute its share towards the running costs of the Old Library

KF5. The Museum of Cardiff has been successful in securing grants, via staff and the Development Trust. However, the Museum lacks the capacity to "earn" income via a café/ shop, as was initially conceived in the Phase II plans for the Museum. Added to this, the lack of certainty over the Museum's future has made fundraising even more difficult than it is anyway.

Footfall

KF6. The Museum of Cardiff has declining footfall as measured by Spotlight data, and this pre-dates the covid pandemic. However, the Museum does a lot of valuable outreach and development work that is not captured in these figures, including temporary exhibitions held off-site.

KF7. All of the following have exacerbated the decline in footfall at the Museum:
   a. loss of temporary exhibition space
   b. exhibitions needing updating
   c. lack of a café
   d. lack of space to host events
   e. staffing reductions

  f. lack of marketing and promotion

  g. lack of signage.

KF8. Whilst footfall is key to success, footfall alone should not be used to measure the value of the Museum; there should be a Social Return on Investment approach, taking into account the partnerships, trust, outreach and development work undertaken and how these have benefited the people and communities of Cardiff.

Governance

KF9. There is a Development Trust that was established to fundraise for the Museum of Cardiff; it does not have any role in the management or operations of the Museum. The Museum of Cardiff does not have a board or advisory group; there are no other trustees assisting the Museum.

KF10. The Charity Commission, Museum Association, Association of Independent Museums, and the museum Accreditation Scheme provide helpful good practice regarding how bodies are constituted and how they should operate to be most effective and ethical.

Community Engagement

KF11. The Museum of Cardiff is seen as the 'go-to' place in Wales for examples of local community engagement, such as work with young people, older people, people with dementia, and refugees.

KF12. There is scope for the Museum of Cardiff to engage more with a wider range of local communities, and use innovative ways to enable this e.g., weekly painting and pottery workshops using items from their collection to inspire the workshop.

KF13. The Museum of Cardiff benefits from its ethical volunteering scheme; Members met some of these volunteers and were struck by their commitment and knowledge and their ability to enrich the visitor experience. Members believe there is scope to build on this.

Inclusivity and Representativeness

KF14. The Museum of Cardiff is one of the least colonial museum in the UK as exhibits all have the explicit permission and narrative of owners.

KF15. There is scope for the Museum to go further by collecting contemporary items, including oral histories, to reflect the huge, vibrant, diverse and exciting history and culture of Cardiff and encourage engagement from a wider range of communities in Cardiff, with objects on display that are relevant to residents across Cardiff. The *Open Up Guidebook* referenced in this Inquiry contains guidance on whose voices are represented and whose stories are shared.

KF16. The exhibitions in the Museum are over ten years old; it is good practice to refresh exhibitions every ten years. There is an opportunity to review exhibitions, their interpretation and display to promote equality and inclusivity, taking a co-curation and host curation approach, as set out in the *Association of Independent Museum's Success Guide – Museum Displays and Interpretation* 2022.

KF17. The Race Equality Task Force findings and the Open Up Guidebook referenced in this Inquiry highlight the need to ensure staff, volunteers and trustees reflect the protected characteristics of local communities.

Working towards the Future

KF18. The work towards securing the future of the Museum of Cardiff would benefit from wider stakeholder engagement, including those with museum experience and those with experience of working with the Museum of Cardiff, such as: Museums Association, Federation of Welsh Museums and Art Galleries, Association of Independent Museums, Amgueddfa Cymru, Professor Jane Henderson, Museum Detox, Caer Heritage, Cardiff People First, and other relevant Cardiff community-based organisations.

Key Factors for a Sustainable Future

Vision & Strategy

KF19. The Museum of Cardiff would benefit from a clear vision and strategy that reflect the Administration's Stronger, Fairer, Greener values as well as the Race Equality Task Force findings.

KF20. The Museum of Cardiff would benefit from having some leading goals to guide partnerships, staffing and funding priorities. The Inquiry heard the Museum could focus on being a campaigning museum, a 'People's Palace', a sustainable futures museum, a schools' resource, a must-see visitor attraction, or a combination of these and more.

KF21. It is critical that stakeholders are part of the discussions and conversations about the future focus of the Museum and that the Museum continues to tell the stories of all peoples of Cardiff.

Audience

KF22. The Museum of Cardiff can be both for local audiences and for visitors, as long as there is sufficient resource to meet these differing needs and expectations. It is important to understand the audience for the Museum of Cardiff, as this will help to build and diversify the audience base, assist with resource allocation and assist with funding applications.

KF23. It is important to market and promote the Museum of Cardiff effectively, to sell the success story that it is, and attract new audiences.

Funding

KF24. The Museum of Cardiff would benefit from having a 3-year funding plan, as recommended by the *Welsh Government's Review of Amgueddfa Cymru* by Dr. Thurley. Members recognise that Cardiff Council has a yearly funding cycle but believe that it would be possible to have indicative funding for Year 2 and Year 3.

KF25. It is critical that good relationships are maintained with existing funders of the Museum of Cardiff; the Inquiry heard Development Trustees are staying connected to funders so that they are in a good place to move forward once a new location is found.

KF26. Some witnesses stated that Cardiff being the capital of Wales does give special status to the Museum of Cardiff or that this idea should be further explored.

Fundraising

KF27. This Inquiry has identified a range of opportunities for fundraising, detailed at points 97-99, including:

   a. Trust and Foundations
      i. Specific to museums and heritage
      ii. Specific to particular groups
   b. Individual Giving
      i. Major Donors
      ii. Supporter groups
         1. Membership/Friends
         2. Patrons
   c. Gifts in Wills/ Legacy Giving
   d. Donation Boxes & Cashless Donations
   e. Public Funders
   f. Postcode Lottery – organised into separate regional trusts.
   g. Landfill Communities Fund (via Entrust)
   h. AIM
   i. The Architectural Heritage Fund which focuses on acquisition, reuse or redevelopment of buildings which are of historic or architectural important
   j. The NESTA Arts Impact Fund.
   k. Crowdfunding
   l. Public Giving Campaign
   m. Online Giving
      i. Via tickets – if get Gift Aid
      ii. Via online giving platform – Charities Aid Foundation, Just Giving, Donor Box
      iii. Encourage regular giving
      iv. Crowd funding
   n. Gift Aid

KF28. The Inquiry heard that some small and medium size Cardiff businesses would welcome an opportunity to contribute funding to the Museum and be featured, especially if the Museum is to be in a prominent city centre location.

KF29. Currently, the Museum of Cardiff lacks sufficient cashless donations points. There is an opportunity to increase cashless donations points at key locations across the Museum of Cardiff.

Income Generation

KF30. Income Generation is key to the future sustainability of the Museum of Cardiff, to protect it from the fluctuations and pressures in the Council's budgets.

KF31. This Inquiry has identified a range of opportunities for income generation, detailed at points 100-108, including:

  a. Events – music, gastronomy, theatre, movie nights, annual calendar of events
  b. Café/ Catering - social visits, private and corporate hire, weddings,
  c. Retail – gift shop, pop-up seasonal shop
  d. Filming
  e. Commercial mindset – and targets for staff
  f. Venue hire – corporate away days
  g. Group Visits
  h. Tours
  i. Photo Shoots
  j. Copyright and licensing
  k. Overnight visits
  l. Gala/ black-tie fundraisers
  m. Day Lockers
  n. Donations – improving these
  o. Specific Gallery trails
  p. Online income generation
      i. Retail sales
      ii. Charge admission for special events/ Premium online offerings
      iii. Introduce virtual membership level/ benefits
      iv. Develop virtual courses/ summer camps

    v.   Online 'gala' fundraiser

   vi.   Develop 'pay-what-you- want' model

  vii.   Artefact adoption

 viii.   Visitor donations

   ix.   Commercial sponsorship

    x.   Web advertising

   xi.   Staff Interactions

KF32. There is an opportunity to strengthen marketing and promotion of day lockers, increasing their usage and generating more income.

KF33. Charging for general admissions would not work for the Museum of Cardiff, given that most museums in Cardiff are free entry as visitors would most likely choose to go elsewhere rather than pay.

Location

KF34. Much thought needs to be given to identifying a location that secures the future of the Museum of Cardiff. The Inquiry found that a new location must meet the following criteria:

   a.   Have security of tenure

   b.   Meet Museum Accreditation Scheme criteria, such as the security of site, areas for learning opportunities, accessibility, and a site where there is good footfall

   c.   Be determined by the goals and objectives of the museum

   d.   Match the exhibition size, scope and footfall of the current Museum of Cardiff location, to minimise the risk of clawback from funders and to provide opportunities to increase the income-stream of the Museum.

KF35. It is essential the new location for the Museum contains appropriate spaces to deliver museum activities and generate income:

   a. Foyers/ entrance

   b. Permanent Displays spaces

c. Temporary Exhibition Space – enables the museum to change, stay on trend and reflect Visit Wales themes, and celebrate/ commemorate anniversaries. This increases footfall and diverse audiences.

d. Office accommodation – better if this is with the museum with most staff on-site.

e. Visitor Facilities – for school visits and other community groups – wet space, activity rooms, handling rooms etc.

f. Collection Space – to process new material into the collection

g. Retail/ Café – this depends on the museum's location and length of stay – can drive income and increase museum footfall.

h. Spaces for hire.

KF36. It is vital that a new location enables income generation to reduce the reliance on the current Council subsidy and so boost the sustainability of the Museum.

KF37. Many historic buildings are tremendously difficult to make accessible and to adapt, with historic interiors limiting and restricting the options available when designing the layout of a museum.

Clawback of existing funding

KF38. The views of funders are important when determining location, both in terms of future funding and in terms of potential clawback of existing funding.

KF39. The Inquiry heard that funders have warned there is a significant risk of clawback of existing funding, depending on the suitability of new arrangements.

KF40. Any clawback of existing funding would significantly affect future applications for funding not only for the Museum of Cardiff but for council projects across Cardiff.

KF41. The risk of clawback can be mitigated by ensuring there are clear assurances that the Museum can stay in the preferred new location for a significant period of time and by ensuring there is a process of negotiation with funders.

Staffing

KF42. The Museum of Cardiff has posts that have not been filled for a number of years. Vacant posts are significantly hindering the Museum of Cardiff achieving its potential; the Museum needs to be properly staffed to achieve its vision, goals and objectives.

Collections

KF43. Welsh Government's Culture Strategy intends to address the need for a strategic approach to digital collections and how these are used to mitigate social exclusion and increase access to museums. Cardiff Council needs to ensure its Culture Strategy also does this.

Interpretation and Displays

KF44. Interpretation and Displays are critical to inclusivity and representativeness and the reputation of a museum. It is imperative that the Museum of Cardiff takes account of the findings of the Race Equality Task Force and the good practice guidance for interpretation and display, such as the *AIM Success Guide* cited in the report, to ensure that its interpretation and displays promote equality and inclusivity, encouraging all communities and visitors to engage with the Museum of Cardiff.

Storage

KF45. Storage provision is a key factor to bear in mind when considering the future plan for the Museum of Cardiff. Glamorgan Archives informed the Inquiry they do not have the capacity to take large items and that, as their requirement for storage increases, they may have to end current arrangements whereby the Museum pays to store some of its collection in the Archives. Members note that, if further storage is required, the Museum would look at other options, including opportunities within the Council estate, that have the right environmental and security conditions.

KF46. Welsh Government has commissioned a Collections Review of Storage across Wales, exploring options around shared storage options. The Museum of Cardiff has been selected to be part of the next phase of this work.

Operating Models

KF47. This Inquiry found several operating models utilised by museums in England and Wales; however, for the Museum of Cardiff the only two that are possible are either to remain as a local authority-run museum or to transfer to a charitable trust.

KF48. There is no appetite for the Museum of Cardiff to stop being a local authority-run museum, as it is considered the disadvantages of doing this greatly outweigh the advantages.

RECOMMENDATIONS

Having considered the evidence presented to this Inquiry, the Economy & Culture Scrutiny Committee makes the following recommendations to Cabinet:

R1. *Ahead of a decision on a new location, ensure the Museum of Cardiff has a clear vision that reflects the Administration's Stronger, Fairer, Greener values as well as the Race Equality Task Force findings, and that this helps inform location selection.*

R2. *Create a 5–10-year delivery strategy, informed by stakeholder engagement, to implement the vision for the Museum of Cardiff, to be reviewed every 3 years.*

R3. *Ensure the vision and strategy clearly set out the need to enable people to tell their stories rather than have their stories told for them, enabling community-based organisations to be involved in co-curating and host curating.*

R4. *Develop a 3-year indicative funding plan to support delivery of the vision and strategy, incorporating grants, fundraising, income generation as well as Council funding.*

R5. *Explore the potential of Cardiff-based small and medium businesses contributing funding to the Museum.*

R6. *Ensure the Working Party engages with stakeholders, including those with museum expertise, community-based organisations that work with the Museum of Cardiff and other relevant Cardiff community-based organisations.*

R7. *Ensure the Working Party takes on board the findings of this Inquiry with regard to location, most notably those set out in Key Findings 34 – 37 inclusive.*

R8. *Ensure that the selected new location enables the Museum to generate income, without diminishing the effective use of exhibition space.*

R9. *Ensure that the selected new location enables the Museum to have a viable temporary exhibition space, in addition to the main exhibition space, to facilitate special events and encourage repeat visits.*

R10. Give a clear commitment to honour the new location's agreed footprint for the Museum of Cardiff.

R11. Strengthen the overall marketing and promotion of the Museum, utilising all available Council communication channels.

R12. Review the Museum of Cardiff's collections, interpretation and displays through the lens of the Race Equality Task Force findings and decolonisation.

R13. Ensure the Museum of Cardiff's collections policy strongly encourages oral histories.

R14. Ensure the Museum is staffed to successfully deliver its vision, goals and objectives in a sustainable manner.

R15. Revive the Museum of Cardiff's learning and outreach work via Schools and Hubs and other community settings, including temporary exhibitions, to encourage participation and boost access and inclusion.

R16. Establish an Advisory Group for the Museum of Cardiff, consisting of individuals with an optimum set of skills and museum expertise, enabling the Museum to benefit from this in the delivery of the vision and strategy.

R17. In establishing the Advisory Group, refer to the Charity Commission and museum governance good practice regarding how bodies are constituted and how they should operate to be most effective.

R18. Harness the goodwill of local stakeholders and communities with an ongoing events programme to enable and nurture relationships.

R19. Explore the potential for external funding to cover the cost of managing and expanding the volunteer programme.

BACKGROUND CONTEXT

1. Museums have a valuable role to play in placemaking, community cohesion, tourism, economic growth, health and wellbeing, and skills and learning[2]. Museums are generators of income for the wider economy – for every £1 contributed directly in GVA, an additional £4.40 is generated in the wider economy through supply chains[3].

2. The Museums Association highlighted to this Inquiry that cities such as Bristol, Manchester and Liverpool have utilised Culture to reinvigorate their local economies and increase their cultural offer; museums can be part of this approach.

3. Welsh Government is the development agency for museums in Wales, with responsibility for accreditation and capital funding.

4. Welsh Government is working on a new Culture Strategy for Wales, which incorporates the learning from the *Expert Review of Local Museum Provision in Wales* (2015).

5. Welsh Government recognises local decision making, with local councils making decisions that are right for them and for their communities.

MUSEUM OF CARDIFF

6. The Museum of Cardiff opened in 2011 as the Cardiff Story Museum[4], following work since 2002 to develop appropriate policies, identify a suitable location, secure funding, and work with local groups, religious groups and community associations to encourage local people to tell the Museum Project about any objects they had which had a story to tell about the history of Cardiff.

7. The Museum of Cardiff is held in high regard, winning a number of awards in a short space of time, which is a reflection of the good work it does. The Inquiry heard the Museum of Cardiff is particularly valued for:

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[2] LGA – Making the most of your museums – A handbook for Councillors - 2019

[3] National Museum Directors' Council - Written Submission to House of Lords Communication and Digital Select Committee Inquiry – A Creative Future - Sept 22

[4] Cardiff Story Museum - A Museum all about Cardiff (cardiffmuseum.com)

- o Community focus and engagement with diverse communities
- o Telling the stories of the people of Cardiff
- o Fostering and harnessing partnerships
- o Co-creation and inculcation of skills
- o Welcoming approach.

8. The Museum has won many awards including:

- o Visit Wales Gold Award - *for delivering a memorable visitor experience*, 2022

- o Family Friendly Museum Award – *shortlisted for website during covid*, 2020

- o Radical Changemaker Award - to *then-museum manager, Victoria Rogers*, , 2019

- o Museums Change Lives Award – *shortlisted for its dementia-friendly programme*, 2019

- o Best Leisure and Tourism Venue – *Cardiff Life Awards* 2017.

9. The current staffing structure is:

- o Exhibitions Officer, who is currently the Acting Museum Manager
- o Project Officer
- o Collections Curator – job-share
- o Front of House supervisor – of 9 front-of house agency staff

10. There are two vacant positions:

- o Museum Manager
- o Learning & Outreach Officer.

11. Members heard the success of the Museum reflects the high calibre staff working at the Museum, which can also be seen in the fact so many of them have gone on to work at the National Museum and Welsh Government to emulate this work elsewhere.

12. The initial plan for the Museum of Cardiff was constructed in phases, with Phase One including the development of the existing exhibitions and Phase Two including the development of exhibitions exploring the themes of Communities, Sport, Leisure and Culture, as well as income generation opportunities including a shop/ café and events. The original footprint of the Museum reflected this, covering the basement, ground floor, first floor, and part of the second floor of the Old Library. In 2015 the footprint for the Museum of Cardiff was reduced to enable the Welsh Language Centre to be

accommodated in the Old Library[5]. The Museum no longer had the First Floor Gallery and relinquished office and storage space on the second floor.

13. The Inquiry notes that, as the Museum is part of Cardiff Council, it is subject to political decisions, which include decisions regarding the property it occupies. Members heard from officers that the Council cannot grant itself a lease but if the Museum was not part of the Council – if it became a charitable trust – then it could be provided with a lease. The benefit of doing this would have to weighed against the disbenefits, as set out later in this report at points 146-152.

Governance

14. The Museum of Cardiff is part of Cardiff Council, which is responsible for its day-to-day operations and planning for its future. As such, the Museum of Cardiff comes under the Council's governance, which ensures accountability and a consistent approach in line with the Council's overall policies and budget.

15. In addition, the Museum itself works to its own Forward Plan, which takes account of the Council, Welsh and UK government priorities and initiatives, and a series of policies, procedures and plans. These include: Museum of Cardiff Forward Plan; Collections Development Policy; Access and Diversity Policy; Volunteer Policy; Learning Policy; Collections Care and Conservation Policy; Documentation Policy; Access to and Use of Collections and Collections Knowledge Policy; and an Emergency Plan.

16. Councils are not able to access all the funding available to museums and so Cardiff Council worked to establish an independent charitable development trust, consisting of trustees who volunteer their time and expertise. The Cardiff Museum Development Trust was registered with the Charity Commission in 2010, with the following Charitable Objective:

"*The Trustees must apply the income of the charity in furthering the objects ("the objects") of the advancement of education of the public in the local history and culture of Cardiff, in particular, but not exclusively, by the establishment and maintenance of a museum in Cardiff to record and preserve the local history and culture of Cardiff and its surrounding area and to promote public interest therein.*'

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[5] Item 2 Cabinet 28 May 2015 Welsh Language Centre.pdf (moderngov.co.uk)

17.   The Inquiry met with Development Trustees, who explained:

  -    the trust is an independent trust established to fundraise for the Museum of Cardiff

  -    it is able to access funds that the Council is not able to, as it can apply for monies that are open to charities

  -    it is part of their role to safeguard the future of the museum – their charitable objective includes establishment and maintenance of a museum in Cardiff to record and preserve the local history and culture of Cardiff and its surrounding area

  -    the Trust is governed by charity law and cannot move too far from its current activities without seeking to change its charitable status and remit

  -    many people are not aware of their role and fingers were pointed at them with the recent headlines during the budget consultation, when it is not their decision to make; this type of decision rests with the Council

  -    the Development Trust is not involved with operational management of the Museum - that is the Council's role.

18.   The Inquiry heard from Development trustees, officers and Councillor Burke, Cabinet Member, Culture, Parks and Events, that there is a positive and collaborative working relationship between the Council and the Development Trust, with proactive and constructive engagement.

19.   It is accepted good practice for trustees to serve no more than 2 terms to ensure the Trust is refreshed and renewed every 3-5 years, and for trustees to serve no longer than 9 years as a rule[6]. Several Development trustees have served for longer than 5 years as it has been hard to recruit new trustees when the future of the museum has been uncertain.

20.   Development Trustees have raised the need for new trustees and are hoping to recruit new trustees with appropriate knowledge, contacts and fundraising skills, once the future of the Museum is secure.

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[6] Charity Governance Code for Smaller Charities – Charity Governance Code Steering Group

Council Spend on Museum of Cardiff

21. The annual budget for the Museum of Cardiff is circa £513K pa. This includes a contribution towards the running costs of the Old Library, via service charges for shared spaces e.g., compliance with health and safety requirements, evacuation procedures, lamp changes etc.

22. Under new lease arrangements, the Royal Welsh College of Music and Drama (RWCMD) has taken on responsibility for repairs and maintenance of Old Library; they confirmed the Museum will have a lease for up to 5 years. During this time, the Museum will continue to contribute towards running costs of the Old Library.

23. The Museum of Cardiff budget was underspent by £61K 2022-23, with vacant posts not filled; the savings generated were used to offset overall overspends within the Council's budget.

## External Funding for Museum of Cardiff

24. The inquiry heard the Museum has been successful in getting grants via the Development Trust and the work of the Museum's staff.

25. The Museum of Cardiff has been directly awarded Heritage Lottery Funding (HLF), Welsh Government and Federation of Museums and Art Galleries of Wales grant funding. Museum staff have also worked with third parties to help them secure external funding for exhibitions and projects - for example assisting with HLF applications, providing oral history training and co-curating exhibitions - resulting in leveraging well over £1M in grants for other community organisations.

26. The Development Trust successfully fundraised initially, helping to secure Moondance Foundation funding, endowments, and HLF match funding as well as holding fundraising events, such as a dinner and a bucket shake.

27. The Inquiry heard from the Development Trust that is has been difficult to fundraise when it has not been clear what the future of the Museum will be; the Trust needs to know the future of the Museum so that it can re-engage big funders and successfully fundraise.

Income Generation

28. Due to its occupancy space being reduced, the Museum of Cardiff does not have the space to generate income from a shop, café, events, or temporary exhibitions.

29. There are donation points throughout the Museum with one cashless point, in the foyer before visitors have entered the Museum.

30. The current annual income generation target is £15,000. The Museum currently income generates from left luggage lockers, school visits and room hire of the Learning Suite.

Footfall

31. Welsh Government stressed to the Inquiry that footfall alone should not be used to measure the value of the Museum; there should be a Social Return on Investment approach, taking into account the partnerships, trust, outreach and development work undertaken and how these have benefited the people and communities of Cardiff.

32. The Welsh Government 2019/20 Spotlight data shows the Museum had between 100,000 – 150,000 visitors; Members heard this is a significant visitor base.

33. Footfall at the Museum has been declining since well before the Covid-19 pandemic; this does not include visits to temporary exhibitions off-site – see point 36.
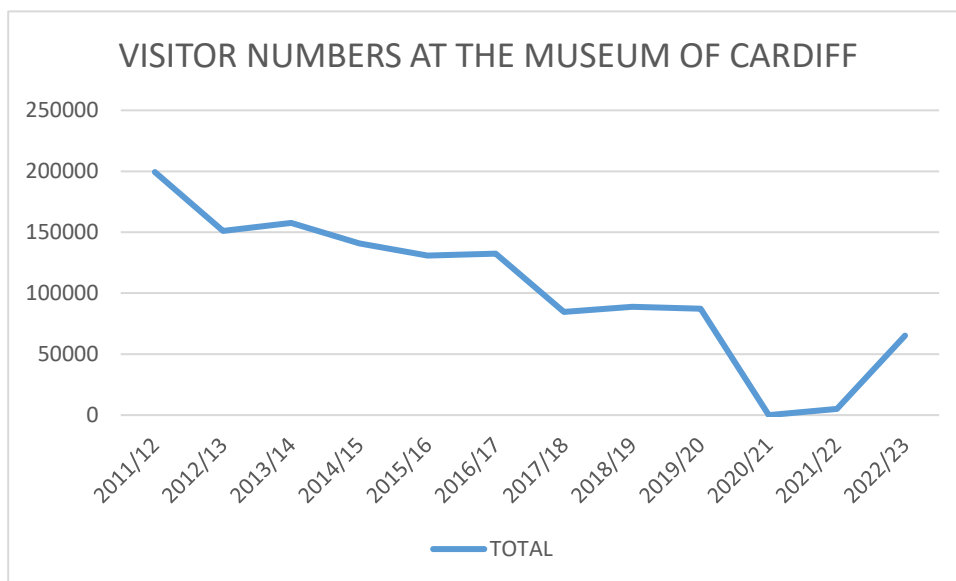
34. Members heard from several witnesses that the following factors have undercut the ability of staff to deliver and have contributed to a decline in footfall:

- o loss of temporary exhibition space – Cardiff People First and Caer Heritage temporary exhibitions received significant visitor numbers – see pages 28 - 29. The Inquiry heard there had been a 3-year waiting list when the temporary gallery was closed. The Inquiry heard the lack of temporary exhibition space impacts on first and repeat visitors

- o staffing reductions – the lack of a Learning Officer in post means the Museum is taking self-led school bookings but is not able to take facilitated bookings or to undertake outreach to schools, leading to a reduction in school visits, a reduction in community engagement and a reduction in subsequent visits

- o lack of marketing and promotion – see points 87-88

- o lack of signage – because the Old Library is a listed building, opportunities are limited to increase external signage

- o lack of a café – V&A has promoted itself as a '*an ace café with quite a nice museum attached'*, illustrating the advantages having a café can have in boosting footfall

- o exhibitions need updating – they are now over 10 years old, which is the accepted timeframe for renewing exhibitions

- o lack of space to host events/ fundraise, which in turn boosts awareness of the Museum and so boosts footfall.

35. Officers explained that the Museum knows how to achieve repeat visits and had success in the past with this, when it had the space and staff to hold events, such as 'mother & toddler' days, and temporary exhibitions.

36. To counter the lack of space onsite, the Museum has worked to hold temporary exhibitions off-site:

   2017-18
   - o *Cardiff Street Photography* exhibition - Pierhead building - 10,074 visitors
   - o *Heroes of the Home Front* exhibition - National Trust's Dyffryn Gardens - 46,529 visitors.

   2018-19
   - o *Protest: Ideas worth fighting for* exhibition - Pierhead building - 5,369 visitors
   - o *Displays at the National Eisteddfod* - 35,400 visitors.

37. Officers explained that, in 2019-20, the Museums worked to provide an events programme to encourage repeat visitors and opportunities for engagement:

- o *Where's Wally Big Museum Hunt -* families travelled from South West England and North Wales to take part in the activity
- o *People of Butetown* project - a collaboration with a group of artists from Butetown resulting in a documentary film, music, artwork, photographs and poetry.
- o *Family fun day* – to celebrate 25 years of the National Lottery Heritage Fund - Pride Cymru, Oasis Cardiff, Romani Cultural and Arts Company, Cardiff People First, Cardiff City Community Table Tennis Club, Jewish History Association of South Wales, Firing Line Museum, Heritage Cultural Exchange, Wales Puja Committee and Mencap Cymru joined the Museum to create a family fun day.

38. Officers added that, in 2020-21, the Museum worked to ensure the covid pandemic is represented in the museum's collection for future generations to reflect on this period of history. It launched *Cardiff in Lockdown* (a photographic project, asking the public to submit their images of how their lives had changed during the pandemic), and worked with the Council's Cardiff Commitment team on their *Diff Diaries* project (encouraging children and young people to upload films, drawings, writing and photographs of their experiences of Lockdown).

39. In addition, to help address the loss of temporary exhibition space, the City Lab part of the Museum was revamped during lockdown and is now a more flexible space, enabling the Museum to react quickly to events e.g., hosting work by The Rebel Bear.

40. Officers felt that their work was starting to positively impact footfall, stating that it was encouraging to see visitor figures return to above pre-pandemic levels in the last quarter of 22/23, demonstrating the importance of flexible space and the ability to change the visitor offer.

Current Community Engagement

41. Welsh Government highlighted the Museum of Cardiff is seen as the 'go-to' place in Wales for examples of local community engagement, such as work with young people, older people, people with dementia, and refugees.

42. Dr Wyatt explained he uses the Museum of Cardiff as an exemplar for his students to understand what it means to be an ICOM museum[7].

43. Members heard clear evidence from Caer Heritage that the Museum of Cardiff is an active participant in community engagement projects with the Ely and Caerau communities of Cardiff; the Museum plays a central role in this, helping to co-create and fostering social cohesion.

Caer Heritage – Caer Heritage is a project that focuses on the heritage of West Cardiff, from the neolithic, iron age, bronze age and roman times, to more recent history of the post-First World War housing estates. It is embedded in the local communities, working with Action in Caerau and Ely (ACE) and local people to learn from them and their histories, and involving academics from Cardiff University as well as Amgueddfa Cymru and the Museum of Cardiff.

The Museum of Cardiff has been an active participant from the start of the project, bringing curatorial and other expertise, for example:

AHRC-funded project 2013 - Museum worked with young people at Mary Immaculate High School, Fitzalan High School and Glyn Derw High School on interpretation and display of their artwork and models, resulting from Caer Heritage AHRC-funded project to do co-creative research involving geo-physical surveys, artists impressions and eco-graffiti.

North Ely Exhibition 2016 – Museum trained young people in how to undertake oral history and intergenerational work and assisted in work with Glamorgan Archives and local Healthy, Wealthy and Wise group to draw out stories of North Ely; the subsequent co-created exhibition received 3,532 visitors, many from Ely and Caerau, over its 8 weeks on display.

Adult Community Learners Project – Museum worked with participants to co-curate a temporary 1-week exhibition that was viewed by over 1, 000 visitors; one participant went on to a degree course.

Covid Pandemic – Museum worked with Caer Heritage to have online 'back garden digs' and 'cupboard excavations', including working with Year 7 pupils from Cardiff West Community High School.

Heritage Centre Steering Group – the Museum is actively involved, co-creating the grant bid and sitting on the Steering Group.

The partnership between the Museum and Caer Heritage is long-term, built on trust, helping to promote and forge social cohesion, foster and harness partnerships and inculcate skills.[8]

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[7] [7] **A museum is a not-for-profit, permanent institution in the service of society that researches, collects, conserves, interprets and exhibits tangible and intangible heritage. Open to the public, accessible and inclusive, museums foster diversity and sustainability. They operate and communicate ethically, professionally and with the participation of communities, offering varied experiences for education, enjoyment, reflection and knowledge sharing** Museum Definition - International Council of Museums - International Council of Museums (icom.museum) accessed 25 May 2023

[8] Our World War – Cardiff suburb reclaims lost heritage - News - Cardiff University
https://www.cardiff.ac.uk/news/view/1340114-hidden-histories-of-caerau-and-ely

44. Members heard from Cardiff People First that their engagement with the Museum is important to them as it helps change society's view of people with learning disabilities and it helps give a sense of purpose to people with a learning disability who are involved with the museum.

Cardiff People First – Cardiff People First is a self-advocacy organisation run by and for people with a learning disability in Cardiff. They have been involved with the Museum of Cardiff for several years:

Exhibitions – the Museum has worked with Cardiff People First to develop two exhibitions. The first exhibition focused on Ely Hospital, telling the stories of the people who lived there and the staff who worked there; it received over 2,000 visitors and was hosted on the first floor of the Museum. The second exhibition was planned to be exhibited at the Museum but had to move to the Pierhead Building when the first floor was given to the Welsh Language Centre. These exhibitions help to ensure people with learning disabilities feel heard and have their lives reflected at the museum, enabling future generations to know about the stories of people with learning disabilities in Cardiff. Members heard Cardiff People First would like to do more exhibitions at the Museum if funding and resources were available.

Take-Over Days – the Museum works with Cardiff People First to plan and facilitate take-over days, which have been running for the last eight years; the next one is planned for 29 July 2023. People with learning disabilities take over the role of staff for the day, helping to change society's view of people with learning disabilities and giving a sense of purpose to those involved.

Volunteering – Museum staff train Cardiff People First members who regularly volunteer at the Museum, helping to meet and greet visitors and show visitors around the museum. Cardiff People First train museum staff and volunteers about disabilities and how to help people with learning disabilities. Volunteering at the Museum enables people with learning disabilities to contribute, meet new people and make new friends, and shows society what people with learning disabilities are able to do.

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45. Members heard the Museum of Cardiff needs to engage more with a wider range of local communities, not just schools, younger families, and older people but people in their 20's and 30's who currently go to Bristol for museums, art, culture and galleries. It is important that the Museum of Cardiff encourages communities in Cardiff to engage with their collections, using new ways to enable this e.g., museum/gallery in Bristol that runs weekly painting and pottery workshops using items from their collection to inspire the workshop.

46. Officers explained the Museum has been enthusiastic in trying new programming ideas to attract the 20-30 age group, such as Acoustic sets in the galleries, Museum Lates and

Bake-Off competitions. They cited analysis of the Museum's visitor profile, that shows in 2011 50% of visitors were over 55 years of age and 23% of visitors were aged 25-44 and in 2019 this changed to 32% of visitors were over 55 years of age and 42% of visitors were age 25-44.

47.   Officers provided the following examples of using collections:
   o   Reminiscence and craft - using collections about cooking to reminisce about food and cooking, while drawing the objects from the collection.
   o   Memory boxes – a collection of handling objects grouped by decade which trained staff and volunteers take to care homes and community centres. Staff and volunteers are dementia friend trained.
   o   Handling boxes – a collection of handling objects by theme, which trained staff and volunteers use in the museum galleries to enable visitors and school pupils to hold and talk about the objects.

Volunteering

48.   The Museum of Cardiff relies on volunteers to provide some of its front-of-house and collections services; on their visit to the Museum, Members met some of these volunteers and were struck by their commitment and knowledge and their ability to enrich the visitor experience.

49.   Cardiff People First members regularly volunteer at the Museum and Members heard this is a good example of an ethical volunteering scheme, where participants receive training, have support and learn skills that help them transition to work.

50.   Officers explained they have just started working with Oasis to provide volunteer opportunities for people who are seeking asylum and that the Museum also provides volunteer placements for two students each year.

Current Inclusivity and Representativeness

51.   Members heard that the Museum of Cardiff is one of the least colonial museums in the UK as exhibits all have the explicit permission and narrative of owners. Members also heard that it has worked to represent various communities in its displays and collections,

including people with learning disabilities, residents of Butetown, Caerau and Ely, Gypsies, Travellers, and Asylum Seekers and Refugees.

52. Officers explained that the Museum is working with Welsh Government consultants who have looked at the Museum's collections, checking for links to empire and colonisation; the consultant will be producing a report and training staff, as part of Welsh Government's delivery of the Anti-Racist Wales Action Plan. Officers also explained that the Museum has partnered with Norena Shopland to develop an LGBTQ+ timeline for Cardiff which is displayed on the Museum's website.

53. Members heard that inclusive interpretation has been a key feature of the Museum since the start, with BSL interpretation making it accessible to the deaf community.

54. Members heard there is a need to improve the signage for the disabled access toilet so that it is clear and obvious to visitors, volunteers and staff; the building is accessible for wheelchair users – they need to know where the disabled toilet is and how to get to it.

Contemporary Collections

55. Members heard from the Museum Association that the Museum of Cardiff is one of the better museums for its work on anti-racism. However, the Museums Association highlighted there is great potential for the Museum to go further by collecting a wider range of contemporary items, to reflect the huge, vibrant, diverse and exciting history and culture of Cardiff and encourage engagement from a wider range of communities in Cardiff, with objects on display that are relevant to residents across Cardiff e.g., information about Betty Campbell, the Windrush Generation, and the current reggae scene in Cardiff.

56. Members reflected on the findings of the Cardiff Race Equality Task Force and that, whilst these do not specifically focus on Culture, many of the findings are relevant to the Museum of Cardiff, for example some of the findings on employment and representative workforce, education and young people, and citizens' voice. Members note the Council has accepted the Task Force recommendations and believe there is scope for the work

of the Museum of Cardiff to reflect this and be part of the work to implement some of these recommendations.

Digital Collections

57. The Inquiry heard that the Museum team secured several grants during the pandemic to support its move to increased digital activity, creating a publicly accessible collections website, with more of the collection being photographed and catalogued. The Museum also created a new section of its website for online exhibitions.

58. Officers explained the Museum also created downloadable resources and activities for families and for home-schooling children in Foundation phase, primary and secondary schools, with the Museum working with partners to print the resources and send them to families without digital access.

WORKING TOWARDS THE FUTURE

59. Following the budget consultation, the Council and Development Trustees formed a Working Party to '*undertake a detailed examination of the best way to ensure a stable future for the museum.*'[9]

60. The Inquiry heard from Council officers and Development Trustees that the Working Party is identifying possible locations, assessing these against the museum Accreditation Scheme requirements and potential clawback of funding, and making a series of recommendations on the best way forward for the Museum.

61. Members heard the Working Party is positive and the best opportunity to secure stability and momentum for the Museum, with constructive dialogue between the Council and Development Trustees about the future of the Museum.

62. This Inquiry notes that the LGA highlights that there are various operating models used by museums in England and Wales, each with its own pros and cons, and that any proposed change takes considerable time and requires a robust options appraisal and

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[9] Cardiff Council U-turns on plans to make Story Museum mobile - BBC News

business case to ensure the proposed model aligns with the needs of the community and local priorities[10]. The LGA stress that, even where a council decides to keep a museum in-house, it should still explore ways in which the museum can improve efficiency and effectiveness and identify barriers to progress which may exist within the council.

63. This Inquiry found that the *Future Proof Approach*[11] is a change programme used across England to improve the resilience of museums, which stresses different approaches are needed for different museums. Museums are encouraged to work on a series of questions regarding whether their vision and approach are desirable, feasible, and viable, testing their inclusivity, representativeness, engagement with local communities, partnership working, efficiency and effectiveness.

64. Welsh Government and other witnesses stressed that it is important local communities along with all the Museum's partners are involved in working out the future for the Museum, to ensure that it keeps its current support and relationships. The Federation of Museums and Art Galleries of Wales stated this could include a public consultation exercise on the possible locations option shortlist.

65. Councillor Burke informed the Inquiry that she supports working collaboratively; officers added that there will be stakeholder engagement to ensure work reflects the broader issues facing the Museum.

Royal Welsh College of Music and Drama (RWCMD)

66. The Museum of Cardiff and the RWCMD will be the main occupants of the Old Library until a new location is found for the Museum. Several witnesses highlighted the opportunity for the Museum of Cardiff and the RWCMD to build a creative relationship, with the Museum being an inspiration for students' creative work, and then benefiting from events drawing in new audiences and increasing footfall.

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[10] LGA – Making the most of your museums – A handbook for Councillors - 2019
[11] Future-Proof-Resource-WEB.pdf (culturehive.co.uk), Future-Proof-Museums-notebook-WEB-SPREADS-1-2.pdf (culturehive.co.uk), Future Proof Museums - Arts Marketing Association (a-m-a.co.uk)

67. Members heard from council officers that the Museum has worked closely with RWCMD since 2014:

    o 2014 - worked with artist Janette Paris as part of the Museums at Night festival. Janette worked with students from the RWCMD to create alternative tours of the galleries, with acting, music and puppets.

    o 2022-23 student puppet shows - the students based their puppet show on the history of Cardiff. They visited the museum to get inspiration and based their shows on the stories they had seen in the museum. Guests to the shows were encouraged to visit the museum prior to seeing the shows.

    o 2022-23 students' performance and events module - as part of their module about arranging an event, students arranged Music at the Museum, and performed in the galleries for visitors.

68. Members also heard concerns that there is a need to have a plan to manage the relationship between the Museum and RWCMD, to ensure day-to-day issues do not adversely affect footfall or the operations of the Museum. Members heard from council officers that there is a positive and constructive relationship between the Museum and RWCMD.

KEY FACTORS FOR A SUSTAINABLE FUTURE

69. Members heard from Welsh Government that the following are important to ensure a successful, sustainable museum:

    o Vision – need a clear vision
    o Strategic Direction – aligning to vision and purpose of museum
    o Location
    o Audience
    o Content of museum - alternating offer – helps draw in repeat visitors, which are really important for sustainability of museum
    o Shop/ Café.

70. Officers explained that they see the following as key to the future of the Museum:

    o A 'permanent home', capital funding, workforce and revenue

- o Forward plan and strong vision
- o Business plan, to develop an operating model with revenue streams built in
- o Continue to develop in partnership and in consultation with Cardiff's communities.

Vision & Strategy

71. Members heard from several witnesses that it is imperative a medium and long-term vision and strategy for the Museum of Cardiff are developed, setting out the purpose of the Museum and enabling the Development Trust to fundraise to this core vision.

72. The *Open Up guidebook*[12] highlights the need for the vision of a museum to be people focused and to champion inclusivity and equity.

73. Members heard that it is important museums are included in the Council's wider Culture Strategy, echoing the finding of the 2017 Mendoza Review of English Museums, which recommended local authorities cultural strategies set out how the Council could best support museums. Members are aware that the Council is working on its new Culture Strategy and is awaiting the publication of Welsh Government's Culture Strategy to ensure the Council aligns with this.

74. Members heard that museums are a driver of economic growth and that other cities, such as Bristol, Manchester and Liverpool have used culture to reinvigorate their local economies and increase their cultural offer.

75. Officers highlighted the aspiration is to have a museum that is as good as the Museum of Liverpool, albeit that they do not have access to the same levels of funding that benefits from, but that the immediate challenge is to find a viable location for the museum.

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[12] Open Up Museums for Everyone – A practical guide to support museums to increase the diversity of their visitors – AIM/ MA/ Arts Council/ Welsh Government/ Museums Galleries Scotland National Museums Northern Ireland/ HLF

Governance

76. Members of the Inquiry discussed with officers whether the Museum needs to have an advisory body or board, including trustees with museum expertise. Officers commented that this could be considered moving forward, once the future of the museum is clearer.

77. Regarding the Development Trust, officers reiterated that it is a fundraising body only and that there will be an opportunity to refresh membership, once the Museum has a clear vision, as this will attract new members.

78. The *Open-Up Guidebook*[13] highlights the importance of ensuring the trustees' protected characteristics, along with staff and volunteers, are representative of the communities they wish to reach and engage, to help create a 360° commitment to an open and responsive culture that champions inclusivity, values diversity and seeks equity.

79. The Museums Association highlighted it is important that some trustees have expertise in museums; Members reflected this is important in cases where trustees have management responsibilities but is arguably less important in the case of the Cardiff Museum Development Trust as its purpose is to fundraise and it works collaboratively with the Museum's staff whilst doing this.

Future Focus of Museum

80. Members asked witnesses for their views on what the future focus of the Museum should be. Several witnesses emphasised that its current focus should remain – it should tell the stories of the people of Cardiff:

'*..the lives of ordinary people should be documented and shared to create a sense of belonging*' Cardiff Civic Society

' *It should tell the stories of working-class people from Cardiff – it has won awards for doing this as people recognise the value of doing this and that most museums do not focus on this.*' Dr Dave Wyatt, Caer Heritage

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[13] See previous reference 12

81.   Professor Henderson highlighted that the Museum could also become a campaigning museum, similar to Manchester University's Museum, and have Citizen Galleries, or it could become a museum that focuses on sustainable futures, focusing on reuse, carbon literacy, sustainable futures etc. Professor Henderson stressed that there are many possibilities, and it is therefore important for there to be discussions and conversations that enable people to express their views on the future of the museum.

82.   The *Open Up guidebook*[14] stresses the need for genuine engagement to understand who else might be involved and how to ensure the Museum reflects local communities.

Audience

83.   Members heard that it is important to understand the audience for the Museum of Cardiff, as this will help to build and diversify the audience base, assist with resource allocation, assist with funding applications, and can be used to improve the resilience of the museum. It is also an important factor to bear in mind when determining a new location.

84.   The Association of Independent Museums (AIM) has published a useful guide[15], that sets out the mix of quantitative and qualitative data needed to understand audiences and low or no cost ways of gathering this information.

85.   Members heard from several witnesses that museums can be both for local audiences and for visitors, as long as there is sufficient resource to meet these differing needs and expectations e.g., exhibitions officer, education officer.

86.   As mentioned earlier, at point 54, the Museums Association Members highlighted there is scope to:

    o   engage more with a wider range of local communities, including people in their 20's and 30's

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[14] See previous reference 12
[15] [Understanding Your Audiences 2020 (aim-museums.co.uk)](#)

    o   encourage engagement from a wider range of communities in Cardiff, with objects on display that are relevant to residents across

87.   The *Open Up Guidebook*[16] contains guidance on whose voices are represented and whose stories are shared, emphasises the need to look at who else might be involved in museums, and stresses it is important to form and nurture relationships with networks and community representatives.

Marketing & Signage

88.   Members heard it is important to market the Museum of Cardiff effectively, to sell the success story that it is, and so help grow the audience.

89.   Members heard it is important to improve the city centre signage to the Museum, so that residents and visitors are clear where it is sited and how to access it.

Funding

90.   Members heard the main monies museums in Wales can bid for are National Lottery Heritage Funding, Welsh Government funding, and Federation of Museums and Art Galleries of Wales grants, complemented by various other grants and trust monies.

91.   Welsh Government clarified that, in addition to the local authority block grant, funding available to museums includes Transformation Capital Grant, Anti-Racist Wales Action Plan revenue and capital grants, one off/ bespoke small revenue and capital grants, and monies from other areas of Welsh Government spend that museums contribute to, such as the Brilliant Basics tourism grants. Welsh Government also confirmed that there might be more funding following the Spending Review, and that there may be additional funding focused on delivering the LGBTQ+ Action Plan in 2024-25.

92.   Welsh Government stated that it may be possible to provide bespoke revenue funding for specific needs, such as a feasibility study on options for the future of Museum of

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[16] See previous reference 12

Cardiff, with the Welsh Government Museums team able to advise on suitable independent consultants.

Capital City Status

93. During the campaign against the budget consultation proposal, several people, including Jo Stevens, MP Central Cardiff, questioned the role of Welsh Government in relation to the museum of the capital of Wales. Members sought the views of witnesses and note:

    o Welsh Government does not have revenue funding for museums. It focuses on ensuring accessibility to culture and heritage for all diverse communities across Wales

    o The Museum of London does not have funding from UK Government but receives funding from the London Assembly

    o Some witnesses did think that Cardiff being the capital of Wales does give special status to the Museum of Cardiff or that this idea should be further explored.

Funding Plan

94. Members heard that it is beneficial for museums to have a 3-year funding plan, as recommended by the Welsh Government's *Review of Amgueddfa Cymru* (Dr. Thurley 2017).

95. Members heard that investment is needed in the Museum of Cardiff to address staffing capacity and enable the Museum to fulfil its potential. The Museums Association recommended that a long-term investment strategy with capital funding be developed, and Dr Wyatt highlighted that it is essential the Museum identifies and sources sufficient funding.

Key Funders & Relationship Management

96. Witnesses highlighted the importance of maintaining good relationships with existing funders of the Museum of Cardiff, including the National Lottery and Moondance Foundation.

97. Development Trustees explained they are staying connected to funders so that they are in a good place to move forward once a new location is found, adding the key is to maintain trust.

Fundraising

98. The *LGA Handbook*[17] highlights the possibility of funding coming from a range of partners, depending on projects and exhibitions being relevant to their needs e.g., health boards, business groups, education providers etc. Research to inform the Inquiry – see **Appendix 2** - found a range of fundraising ideas used by other Museums.

   1. Trust and Foundations
        a. Specific to museums and heritage
        b. Specific to particular groups
   2. Individual Giving
        a. Major Donors
        b. Supporter groups
             i. Membership/Friends
             ii. Patrons
   3. Gifts in Wills/ Legacy Giving
   4. Donation Boxes & Cashless Donations
   5. Public Funders
   6. Postcode Lottery – organised into separate regional trusts.
   7. Landfill Communities Fund (via Entrust)
   8. AIM
   9. The Architectural Heritage Fund which focuses on acquisition, reuse or redevelopment of buildings which are of historic or architectural important
   10. The NESTA Arts Impact Fund.
   11. Crowdfunding
   12. Public Giving Campaign
   13. Online Giving
        a. Via tickets – if get Gift Aid
        b. Via online giving platform – Charities Aid Foundation, Just Giving, Donor Box
        c. Encourage regular giving
        d. Crowd funding
   14. Gift Aid

99. Andrew RT Davies MS stated '*The funding model ought to involve more private sector involvement, with the revenue this would bring. Some small and medium size Cardiff businesses would welcome an opportunity to be featured, especially the case if the Museum is to be in a prominent city centre location such as the Old Library building.*'

100. Members heard there is potential to improve the donation rate by empowering staff to actively seek donations, increasing signage for donations, and increasing cashless donation points

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[17] LGA – Making the most of your museums – A handbook for Councillors - 2019

Income Generation

101. Research for the Inquiry – see **Appendix 2** - found the following income generation approaches being used by other museums:

     1. Events – music, gastronomy, theatre, movie nights, annual calendar of events
     2. Café/ Catering - social visits, private and corporate hire, weddings,
     3. Retail – gift shop, pop-up seasonal shop
     4. Filming –
     5. Commercial mindset – and targets for staff
     6. Venue hire – corporate away days
     7. Group Visits
     8. Tours
     9. Photo Shoots
     10. Copyright and licensing
     11. Overnight visits
     12. Gala/ black-tie fundraisers
     13. Day Lockers
     14. Donations – improving these
     15. Specific Gallery trails
     16. Online income generation
          a. Retail sales
          b. Charge admission for special events/ Premium online offerings
          c. Introduce virtual membership level/ benefits
          d. Develop virtual courses/ summer camps
          e. Online 'gala' fundraiser
          f. Develop 'pay-what-you- want' model
          g. Artefact adoption
          h. Visitor donations
          i. Commercial sponsorship
          j. Web advertising
          k. Staff Interactions

102. Welsh Government highlighted the approach to income generation would vary from museum to museum, that museums had to choose an approach they were comfortable with and that met the needs of their local communities, and that it was important to have a mix of approaches to ensure the museum is not wholly reliant on one approach.

103. The *LGA Handbook*[18] highlights that Councils can reduce barriers to enterprise and ensure freedom for museums to flourish, for example by ensuring security of tenure and control of branding, communications, finances and operations. This can help with access

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[18] LGA – Making the most of your museums – A handbook for Councillors - 2019

to UK Government funding such as Museums and Galleries Tax Relief, which has recently been extended till 2026.

104. Members heard some museum directors would be emphatic that a shop and café have to be part of the visitor experience, even if they do not make any money, as they help to extend visitor stay and helps to attract repeat visitors.

105. Members heard that there are revenue opportunities that the Museum of Cardiff could exploit if it had the space to have a shop and/ or a café.

Admission Charging

106. One in three local authority museums charge for admission[19]. Research has found there is no direct link between the diversity of audiences and whether a museum charges for admission or not, with the pattern in terms of social mix being very similar. However, such a finding needs to acknowledge that the general social mix of museum visitors is not always representative of the wider social mix within their communities.

107. Witnesses were in agreement that charging for admissions would not work for the Museum of Cardiff, given that there are free entry museums in and around Cardiff that visitors would most likely choose to go to rather than pay.

108. Some witnesses wondered whether it would be feasible to charge for special exhibitions if people were assured that the monies raised would be spent on the next, quality, exhibition. However, Welsh Government highlighted that this could impact on membership schemes – a museum needs to be able to offer something extra to warrant the membership charge and if it is not free entry, then they need to think about offering additional activities or content, such as lectures, speakers, first viewings, special content.

109. Brighton & Hove Council introduced charging in 2015, for the Brighton Museum & Art Gallery, for visitors, with exemptions for local residents, museum members, students in full time education in Brighton & Hove, and all UK school children.

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[19] LGA – Making the most of your museums – A handbook for Councillors - 2019

Location

Current location

110. Several witnesses highlighted the current location provides good access to the Museum of Cardiff as it is central and has wheelchair access. Some witnesses stated that the current location is valuable as it has the prestige of being in the centre and in a beautiful building.

111. Dr Wyatt highlighted that the current location provides a free space in the city centre and as such is important, particularly as it is family-oriented.

112. However, Members also heard that the current location does not enable the Museum to create revenue and that it has limited space in the building.

Temporary Location

113. The Federation of Museums and Art Galleries of Wales highlighted the need to avoid a temporary move as these can result in the downgrading of a museum as footfall, interest and good intentions wane, with the danger that the museum is still in the temporary location twenty years later.

New location

114. Members heard that a new location must:
    o Have security of tenure
    o Meet Accreditation Criteria, such as the security of site, areas for learning opportunities, accessibility, and a site where there is good footfall
    o Be determined by the goals and objectives of the museum
    o Match the exhibition size, scope and footfall of the current Museum of Cardiff location, to minimise the risk of clawback from funders and to provide opportunities to increase the income-stream of the Museum.

115. Members heard that it is important the museum is accessible for school trips in terms of drop off/ pick up points and for lorries to enable delivery and collection of large exhibition items.

116. Councillor Burke, Cabinet Member, Culture, Parks and Events, stated that the new location would have to have similar square footage, to not take away from the existing offer. It would have to be a realistic alternative, not a short-term option but a long-term commitment.

117. Officers added that, ideally, the new location would be bigger that the current location, to reflect the original footprint of the Museum when it was first opened. However, in the first instance, it is important the new location is not smaller. Officers also explained that the new location would need to enable income generation, to reduce reliance on the current Council subsidy of circa £513k pa, and so boost the sustainability of the Museum.

Essential Spaces in Future Museum

118. Members heard it is essential the new location for the Museum contains:

- Foyers/ entrance
- Retail/ Café – to drive income and increase museum footfall and length of stay
- Permanent Displays spaces
- Temporary Exhibition Space – enables the museum to change, stay on trend, reflect Visit Wales themes, and celebrate/ commemorate anniversaries. This increases footfall and diverse audiences.
- Office accommodation – it is better if this is with the museum with most staff on-site.
- Visitor Facilities – for school visits and other community groups – wet space, activity rooms, handling rooms etc.
- Collection Space – to process new material into the collection
- Spaces for hire – to drive income and raise awareness of the museum, thus increasing footfall.

Possible locations in Cardiff

119. Members heard a city centre location would be good as it would be easy for local people to access, which would help with repeat visits, and it would be easy to access for visitors to Cardiff.

120. Members heard Cardiff Bay could be a good location, particularly if the Museum is looking to attract footfall from visitors to Cardiff, especially with planned developments such as the Indoor Arena.

121. The Museums Association commented that Cardiff Castle would not be a suitable permanent location as it is too small for the Museum of Cardiff's current collections and future needs, and this would mean the National Lottery would clawback funding and that it would be very unlikely to support bids for future funding. However, Cardiff Castle could be a temporary location, as long as a permanent location was assured and in writing, as otherwise funders would not be convinced.

122. Andrew RT Davies MS stated that buildings such as City Hall, Cardiff Castle or St David's Hall each have their own offer so the Museum must not "water down" what is already provided.

123. Professor Henderson highlighted that many historic buildings are tremendously difficult to make accessible and to adapt, restricting options.

Views of Funders

124. The views of funders are important when determining location, both in terms of potential clawback of existing funding and in terms of future funding.

125. The National Lottery is the main funder of museums. Professor Henderson explained it is important to meet their requirements for funding; they start from a community-focused approach, so proposals need to be community-led and community-based.

126. If proposals meet funders requirements, it may be possible to get funding to move to a new location e.g., Lottery funding to move to a new location that fitted with their community goals and desire to tackle socio-economic issues.

Clawback of Funding

127. Welsh Government explained that, if the Museum of Cardiff closes or changes location, there is a significant risk that funders may seek to clawback existing funding as the

expectation when they gave the funding, that exhibitions etc. would be available for a certain length of time, may no longer apply.

128. Funders seeking clawback would include National Lottery Heritage Fund, Welsh Government, V&A, and, potentially, Moondance Foundation.

129. Members heard that funders are watching carefully to see what happens with the future of the Museum and that it is important there is clear communication with funders about the future of the Museum.

130. Development Trustees advised that risks of clawback can also be mitigated by ensuring there are clear assurances that the Museum can stay in the preferred new location for a significant period of time and that there is a process of negotiation with funders.

131. Witnesses advised Members that clawback is a reputational risk for Cardiff Council – not only regarding the Museum of Cardiff but regarding the other HLF projects across Cardiff.

Options Appraisal

132. The Federation of Museums and Art Galleries of Wales informed the Inquiry there should be an options appraisal, looking at where would be best, what facilities are there, and what the costs would be.

133. Members heard the Development Trustees are working with Cardiff Council, via the Working Party, to go through a list of possible locations that meet accreditation requirements and enable income generation. A high-level options appraisal to review several opportunities quickly identified that many of the options are not suitable – costs are prohibitive, and/or they have liabilities associated with heritage buildings.

134. Officers explained they are narrowing down the options and will then procure an independent Feasibility Study, which will include looking at a Social Return on Investment model, assessing income generation opportunities, and liaising with stakeholders.

135. Officers explained that there could be a possibility of a new, bespoke building of an adequate size, as part of other projects, helping to mitigate costs; however, this would take a long time to achieve, so officers are looking for another location that is available sooner than this.

Staffing

136. Members heard the level of future staffing should be determined by the goals and objectives of the Museum and could include:

    o funding officer
    o community engagement/ learning & outreach officer
    o curatorial staff
    o Museum Manager.

137. Officers explained that a certain level of staffing is required to maintain Accreditation status, that the Museum's front of house team is its USP, and that the final structure will be determined by the future operating model of the Museum.

Collections

138. The Inquiry heard about the growth in online, digital collections. The Senedd Inquiry on the impact of the pandemic on heritage, museums and archives (2020)[20] explored the need to take account of digital delivery, and recommended increased resources, a strategic approach, and clarity about how digital collections are used to mitigate social exclusion and increase access to museums. The Welsh Government response[21] highlighted their Culture Strategy will address these, that additional funding has been provided and that the Cultural Contract ensures funding is deployed with social purpose.

139. The *LGA Handbook*[22] references the Hidden Museum at Bristol as a case study of how technology is being used by families and young people to explore museum collections.

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[20] cr-ld13401-e.pdf (senedd.wales)

[21] gen-ld13469-e.pdf (senedd.wales)

[22] LGA – Making the most of your museums – A handbook for Councillors - 2019

Interpretation and Displays

140. Members heard that interpretation and displays are important as by reviewing and considering our interpretation we can promote equality and inclusivity. The AIM Hallmark[23] states:

    o museums need to '*develop and understand our collection, identify missing perspectives and histories and use them to encourage debate and discussion*'

    o '*Co-curation takes audience engagement further and invites people to come on in and help us design and interpret our collection. True co-curation is about giving equal control and decision ..Derby Museums use a toolkit called Human Centred Design which provides ideas and new ways to involve people in the design process*'

141. Members heard it is important that museums think about the stories they want to tell, and focus displays accordingly. Members note that oral histories are an important part of this.

142. Members heard it is important to not put everything on display – to keep some in reserve to enable displays to be refreshed.

Storage

143. Members explored with witnesses whether storage should be on or offsite and heard:

    o The Museum of Cardiff should be increasing its collection and so storage is required as only about 10% of collection is on display at any one time, allowing for displays to be refreshed

    o Storage should not be too far away as it makes it more difficult to keep an eye on it and makes it harder to refresh displays

    o If storage is offsite, it means more buildings can be considered for relocation

    o It makes sense for storage to be offsite as then not paying costly rental for space

    o The new location should focus on display, interpretation, learning and activities rather than storage.

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[23] AIM-Succes-Guide-Museum-Displays-and-Interpretation-FINAL-smaller.pdf (aim-museums.co.uk)

144. Welsh Government explained they have commissioned a Collections Review of Storage across Wales, exploring options around shared storage options, as happens at the Science Museum's facility in Wroughton, Swindon. Officer confirmed that the Museum has contributed to the initial survey and that the Museum has been selected to be part in the next phase of this work, looking at collections and digital storage.

145. Glamorgan Archives informed the Inquiry that their storage is geared towards archival items, and they do not have the capacity to take large items. They commented that they often work closely with the Museum on collections that have a mixture of documentary and object material where the Archives takes the documents or photographs and the Museum the objects or works of art. They highlighted that their requirements for storage grow every year and, in the event that the Archives would need the space back, they would have to give notice to end the agreement with the Museum to be able to use the shelves ourselves. They explained this is likely to be some years away but is worth bearing in mind that it is a possibility in the future.

146. Offices explained that, if further storage was needed and Glamorgan Archives was not able to assist, the Museum would look at other options, including within the Council, that had the right environment and security conditions.

Operating Models

147. Members sought the views of witnesses on the various possible operating models for the Museum of Cardiff and note:

   o Welsh Government stated that there are 3 operating models applicable for Local Authority-run museums – they stay Local Authority-run, they move into a charitable trust, or they move into an independent trust

   o The charitable trusts in Wales that include museums also include other areas such as leisure that generally subsidise the operation of museums

   o There is only one example in Wales of a Local Authority-run Museum moving to an independent trust and Welsh Government do not think this is a viable model for the Museum of Cardiff

   o The Federation of Museums and Art Galleries of Wales highlighted that Local Authority-run museums are the most successful and most strategic museums in

Wales because these museums are focused on Welsh Government objectives, are key to their delivery, take this wider strategic view and are committed to this agenda e.g., wellbeing – Dementia and Parkinson's cafes and projects, projects for people with special needs.

148. Development Trustees informed the Inquiry that they do not support the museum moving to a charitable trust or independent trust, believing it should stay with the Council as the Council's backing helps with the credibility and sustainability of long-term funding.

149. Officers explained that charitable trusts still require significant monies from local authorities and that they require extra staff and funding to tackle the work currently provided by the Council's central services e.g., health & safety, graphic design, communications, procurement, HR etc. Moving to a charitable trust would not necessarily solve, in and of itself, the issue of the Council's subsidy for the Museum. Officers added the pros of moving to a charitable trust may not outweigh the cons, particularly as there is already the Development Trust to fundraise.

150. Officers stated that it is a balance between costs and controls – if the local authority gives monies, it expects control. Members would also need to consider that they would be relinquishing control to non-elected representatives.

151. Councillor Burke, Cabinet Member, Culture, Parks and Events, stated that she was keeping an open mind – all options are worth investigating to find out about pros and cons before making a final decision.

152. The *LGA Handbook*[24] provides a useful summary of existing guidance and key factors to consider when appraising alternative delivery approaches. They highlight the Department for Digital Culture Media and Sport (DCMS) has produced guidance, with the following table summarising the characteristics of the alternative delivery models DCMS identified:

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[24] LGA – Making the most of your museums – A handbook for Councillors - 2019

Delivery model	Ownership	Governance	Services
Local Authority Trading Company (sometimes referred to as a Wholly Owned Company)	100 per cent parent council(s)	Can be designed for flexibility/autonomy. Requires a council-appointed board. Service Level Agreement (SLA)/ contract with parent council(s) – control test	Flexible, but the majority of services delivered on behalf of parent council(s) – function test
Public Service Mutual (PSM)	Variety of options: council and staff, staff and community, 100 per cent staff	Can be designed as required. Board membership dependent upon ownership. SLA/ contract with council(s). Well positioned to promote co-production	Flexible – can deliver services to councils, private or voluntary and community sector customers
Outsource to existing social enterprise, third sector or private provider	100 per cent third party provider	Arranged via contract. Well positioned to promote co-production	Contracted services delivered on behalf of council(s)
Joint venture	Potential for joint ownership, including staff, council(s) and/ or third party provider	Can be designed as required. SLA/ contracts as required. Well positioned to promote co-production	Flexible – can be delivered to council(s) and private/voluntary and community sector customers

153. The *LGA Handbook*[25] summarises the main advantages and disadvantages of moving to an Independent Trust as:

Advantages	Disadvantages
Starting a new trust from scratch – can allow the museum or cultural trust to review, and be clearer about, its purpose/objectives	Loss of council back-office support (legal/ HR/finance). This may increase costs for these services
Freedom to raise income and fundraise independently (people may be more willing to give money to the trust than a council)	Museum under no obligation to respond to local agendas and becomes at risk of becoming removed from council priorities
May create greater awareness of full costs and give staff capacity to manage finances more efficiently	Increased pressure on museum to source alternative funds (which may not be viable)
Focused on delivering the vision and mission of the museum (not the local authority)	Challenge of fundraising with larger funders (eg ability to offer match/support in-kind)
Ability to claim Gift Aid	VAT liabilities may apply
Possibility of negotiating business rates relief (business rates are not charged when inside the council, but a trust could be liable)	Set-up costs can be extensive

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[25] LGA – Making the most of your museums – A handbook for Councillors - 2019

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APPROACH TAKEN

M1. Members undertook this Inquiry during May 2023 – July 2023.

M2. Members received evidence from the following internal stakeholders who attended a question & answer session:

- Cllr Jennifer Burke – Cabinet Member – Culture, Parks and Events
- Neil Hanratty – Director of Economic Development
- Donna Jones – Assistant Director, County Estates
- Kathryn Richards – Head of Culture, Venues, Tourism and Events
- Alison Tallontire – Acting Manager, Museum of Cardiff

M3. Members visited the Museum of Cardiff and met with staff and volunteers, listening to their experiences of working in the Museum of Cardiff and views on the future of the Museum.

M4. Members also received evidence from the following external stakeholders who attended meetings with the task group:

- Ian Courtney, Gabriella Howell, Janey Howell, Gerallt Jones, Mark Munnery, Richard Tynen – Development Trustees
- Chris Delaney - Federation of Museums and Art Galleries of Wales
- Dawn Gullis, Ashlea Harris, Zarah Kaleem, George Langton, Lisa Pickard, Sarah Thomas - Cardiff People First
- Nicola Guy - Welsh Government, Culture Division – Deputy Director
- Professor Jane Henderson – expert witness
- Joshua Robertson - Museum Association
- Dr Dave Wyatt - Caer Heritage

M5. Members wrote to several key stakeholders offering them the opportunity to give their views to the Inquiry. Written responses were received from:

- Andrew RT Davies MS
- Heledd Fychan MS
- Rhys ab Owen MS
- Julie Morgan MS

- Cardiff Civic Society
- Glamorgan Archives
- Royal Welsh College of Music and Drama.

M6. In addition to the above, Members considered users views via visitor survey responses and school users' feedback, as well as the consultation responses received to the Council's Budgetary Proposals Consultation.

M7. To inform the Inquiry, Members were provided with briefing reports ahead of each meeting, including the *Open Up Guidebook*, produced by the Association of Independent Museums. These have been synthesised into the report.

M8. The evidence has been used to identify suitable findings from the Inquiry.

FINANCIAL IMPLICATIONS

The Scrutiny Committee is empowered to enquire, consider, review, and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters there are no direct financial implications at this stage in relation to any of the work programme. However, financial implications may arise if and when the matters under review are implemented with or without any modifications.

LEGAL IMPLICATIONS

The Scrutiny Committee is empowered to enquire, consider, review, and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters there are no direct legal implications. However, legal implications may arise if and when the matters under review are implemented with or without modification. Any report with recommendations for decision that goes to Cabinet / Council will set out any legal implications arising from those recommendations. All decisions taken by or on behalf of the Council must (a) be within the legal power of the Council; (b) comply with any procedural requirement

imposed by law; (c) be within the powers of the body or person exercising powers on behalf of the Council; (d) be undertaken in accordance with the procedural requirements imposed by the Council e.g. standing orders and financial regulations; (e) be fully and properly informed; (f) be properly motivated; (g) be taken having regard to the Council's fiduciary duty to its taxpayers; and (h) be reasonable and proper in all the circumstances.

COMMITTEE TERMS OF REFERENCE

- To scrutinise, measure and actively promote improvement in the Council's performance in the provision of services and compliance with Council policies, aims and objectives in the area of economic regeneration.

  o Cardiff City Region City Deal

  o Inward Investment and the marketing of Cardiff

  o South East Wales Economic Forum

  o Economic Strategy & Employment

  o European Funding & Investment

  o Small to Medium Enterprise Support

  o Cardiff Harbour Authority

  o Lifelong Learning

  o Leisure Centres

  o Sports Development

  o Parks & Green Spaces

  o Libraries, Arts & Culture

  o Civic Buildings

  o Events & Tourism

  o Strategic Projects

  o Innovation &Technology Centres

  o Local Training & Enterprise

- To assess the impact of partnerships with and resources and services provided by external organisations including the Welsh Government, joint local government services, Welsh Government Sponsored Public Bodies, and quasi-departmental non-governmental bodies on the effectiveness of Council service delivery.

- To report to an appropriate Cabinet or Council meeting on its findings and to make recommendations on measures, which may enhance Council performance or service delivery in this area.

Economy & Culture Scrutiny Committee Membership

Councillor Peter Wong
(Chairperson)

Councillor Rodney Berman

Councillor Catriona Brown-Reckless

Councillor Jane Henshaw

Councillor Peter Huw Jenkins

Councillor Jackie Jones

Councillor Helen Lloyd Jones

Councillor Jon Shimmin

Councillor Leonora Thomson

APPENDICES

Appendix 1 – Operating Models

Flintshire - a charitable, not-for-profit, organisation, Aura, is responsible for managing the majority of leisure, libraries and heritage services, including museums. Aura is owned by its employees and operates for the benefit of local communities. The company's legal model is a Community Benefit Society which means that any financial surplus generated is reinvested into facilities and services to improve the customer experience and to sustain and enhance the offer for future generations

Merthyr - Cyfarthfa Castle Museum and Art Gallery – moved from the local authority and is now operated as part of an independent trust (*Merthyr Tydfil Leisure Trust)* and is able to access large amounts of funding as it has a clear vision and focus on being a 'people's history' museum.

Merthyr and **Flintshire** are examples where the local authority established Arms-Length Trusts because they felt they would be able to seek extra monies and benefit from VAT savings, non-payment of business rates - as they are a charity – and also benefit from more trustees with more expertise. A big issue with this approach – the local authorities kept hold of the central expenditure budgets, meaning the museums had to find monies for these functions, such as HR.

MonLife – following a review of its heritage, cultural and leisure services, Monmouthshire Council decided to keep these in-house, in part because they could support its policies and it felt they provided good news stories that the Council could benefit from. The Council created a bespoke department for these services – MonLife – enabling a more agile approach. In terms of the museums, these have been successful in attracting funding, including Collections Review monies and Esmée Fairbairn funding, and have slightly increased their staffing levels.

Newport – local authority museum – is good at events - such as poetry readings and music, which are a good way to boost footfall and, in the case of the music events, attracted a slightly different audience than usual – but these events may be at the expense of a permanent gallery – their contemporary collection is exciting.

Powys - Judges Lodgings – transferred from Powys Council to a charitable trust - recently announced that it would receive more funding from regional development monies.

Powys – Newtown Museum - Council has undertaken a capital asset transfer to Newtown Museum, meaning the Museum is out of the local authority's control and is completely independent.

RCT – the Council decided to transfer responsibility for operating the museum to an independent trust, enabling it to access community funds not available to the Council – such as the Landfill Tax monies. The Council retains ownership of the buildings and collections; if the trust fails, the responsibilities fall back to the Council.

Swansea – is a good example of a museum benefiting from their proximity and relationship with the National Museums – not feeling threatened by it but using it to maximise co-location.

Tenby Museum has always been independent but is based in a council building, with a peppercorn rent and the Council meeting maintenance costs via a capital grant. The Council is now transferring the building and grant to the Museum. These transfers are taking place as it is easier for independent museums to tap into

other monies but only if they have control of the building and other monies as well, as funders look for collateral to support bids.

Wrexham – a good example of local authority museum doing well – they have had a consistent focus – they identified strengths and worked on these – football, industrial history – and prioritised collections relevant to these strengths and identified appropriate funding e.g., National Lottery

Appendix 2 – Synopsis of Research

Key Points from published reports/ articles:

CONTENTS

Income Generation:

List of ideas in articles below:

1. Events – music, gastronomy, theatre, movie nights, annual calendar of events
2. Café/ Catering - social visits, private and corporate hire, weddings,
3. Retail – gift shop, pop-up seasonal shop
4. Filming –
5. Commercial mindset – and targets for staff
6. Venue hire – corporate away days
7. Group Visits
8. Tours
9. Photo Shoots
10. Copyright and licensing
11. Overnight visits
12. Gala/ black-tie fundraisers
13. Day Lockers
14. Donations – improving these
15. Specific Gallery trails
16. Online income generation
    a. Retail sales
    b. Charge admission for special events/ Premium online offerings
    c. Introduce virtual membership level/ benefits
    d. Develop virtual courses/ summer camps
    e. Online 'gala' fundraiser
    f. Develop 'pay-what-you- want' model
    g. Artefact adoption
    h. Visitor donations
    i. Commercial sponsorship
    j. Web advertising
    k. Staff Interactions

Generating Income at Museums - Welcome to PSC - Tourism Consultants (pslplan.co.uk)

Taking the time to identify and develop an institution's assets provides a deeper level of understanding of where to focus resources and efforts.

- Audience research and segmenting gives visitor experience and marketing teams an invaluable insights into visitor behaviour, this is essential when developing the visitor offer to create a museum experience people want to visit and revisit.
- Events can drive additional sales but require careful budgeting and consideration before committing time and resources. Investing in bigger, more memorable events can be more effective if the museum has the skills and capacity to deliver a quality experience on a larger scale. Venues are exploring opportunities to diversify into the **arts, licensing venues for evening music, gastronomy and theatre events.** Some events may only just break even, but with the objective of attracting new audiences to see a future benefit. In our experience developing a successful **annual calendar of events** takes a number of years to establish. Also, to de-risk the event, partnership opportunities should be explored in terms of delivery, marketing and ticket sales. There are also considerations in terms of marketing the events and impact on the day-to-day operation of the museum itself.
- The expectations of visitors are also changing. Museums (and other attractions) are becoming a destination for segments of visitors seeking a social visit, enhanced by a superior catering service. Having the **right catering offer** in the right place is key, encouraging visitors to increase their dwell time and secondary spend. Themed restaurants create experiential dining, with visitors often prepared to increase their expenditure for interesting or sustainably sourced, local produce. Catering can be managed in-house or by a third-party specialist provider. Partnership with celebrity brands can also drive footfall, for example the River Cottage Deli and Botanical Bar at the Imperial War Museum on HMS Belfast.
- A quality catering offer also creates greater demand **for private and corporate hire**. Exclusive site hire for **weddings and private parties** can be a fantastic way to increase revenue but a clear understanding is needed of how any secondary business will impact on the core operations of the museum.
- The development of a bespoke retail offer can be a significant investment but with the right design team, it can complement the brand, reinforcing its values and boosting spend per head. Creating product ranges around current exhibitions reduces seasonal fluctuations in demand and generates continued interest. It is also important to consider online sales to engage with audiences who may not necessarily visit the museum in person.
- Filming creates significant income for organisations such as The National Trust. The revenue from costume dramas and films can bring substantial revenues. For other venues, hosting television programmes like The Antiques Roadshow can boost revenue and visitor numbers (and help to raise the profile of the destination).
- There are other revenue streams such as **corporate and social functions** through to **membership schemes**

Income-Generation-and-Fundraising-for-Museums.pdf (sharemuseumseast.org.uk)

Epping Forest District Museum – housed in a Grade II listed Tudor building in Waltham Abbey – '*The management team have embedded a **commercial mindset** by including discussions about income generation in team meetings and individual reviews. Income generation **targets** are set where appropriate. Staff are encouraged to put forward ideas for projects and activities that might support income generation and to look outside the museum for fundraising best practice that could be adopted by the organisation. This whole-organisation approach to income generation has been key to its fundraising success'*

Developing Retail Offer:

- Ask independent volunteers to conduct 'mystery shopper' visits to your shop to find out if the layout and retail offer could be improved.
- Keep a detailed stock inventory and weed out any items that do not sell well. Stock that is stuck in cupboards is just taking up room and not making you any money.
- Ensure you have a balance between low- and high-priced items.

Income Generation in London's non-National Museums_FINAL (museumoflondon.org.uk)

Museums generate income from a range of sources including core funding, grants, trading, contracts, fundraising, membership schemes, admission fees, corporate sponsorship and investment income. The balance between each of these sources differs depending on the museum's scope and collection

- **Income from trading**, such as gift shops, cafes and online retail, venue hire, group visits, tours, weddings, filming and photo shoots

- **income from copyright and licensing** of their image - '*One museum interviewee, for example, described receiving a grant from the Esmée Fairbairn Foundation to document the strong collection of glass lantern slides that they own. The interviewee is looking into a partnership with the Royal Geographic Society and the Bridgeman Art Gallery, and noted that the reproduction rights that result from documenting the slides could generate income. Recent changes in another museum to IT restrictions have freed them up to exploit the online market: the museum is in the process of scanning images for a 3D image library (the three staff employed to work on the project are funded by a corporate sponsor) which the interviewee anticipated would lead to increased income from the sales of online images.*'

Income Generation in Museums - creating a better visitor experience while raising revenues - Museums + Heritage Advisor (museumsandheritage.com)

Hosting Events - Birmingham Museum & Art Gallery – Grade II listed building in centre of town – competitive prices and high standard of catering and marketing – receptions, banquets, parties and launches

Pop-up seasonal shop – Museum of London - 6 weeks from mid-November to end of December – seasonal products and gifts, local creatives – commission on sales

How museums can generate revenue through digital content and virtual experiences - CultureHive

Ever since the COVID-19 pandemic forced museums of all kinds to close their doors, many have responded by shifting their attention to engaging audiences through virtual and remote channels. Through social media initiatives, virtual tours, live-streamed events, and an array of digital content, cultural organizations have made substantial efforts to expand their digital offerings throughout the period of lockdown.
As museums look to generate revenue through virtual initiatives, here are six ideas to consider:

1. **Charge Admission for Special Online Events** - charge a fee for digital events, and for "virtual museum tour" e.g., Hastings Contemporary and the Van Abbe Museum , and include the option to purchase discounted bundles of merchandise from the museum store
2. **Introduce a virtual membership level/ benefits** – also helps to incentivise new membership and creates long-term loyalty of existing member base e.g.
   - National Steinbeck Center, offers a virtual membership level, which provides an interactive, content-rich way to experience the museum remotely.
   - Seattle Museum of Art offers a (now-virtual) special members-only lecture series with its curators
   - Virginia Museum of Fine Arts has also begun special "Cocktails with the Curator" virtual sessions for its "Friends Circle" members and higher
3. **Develop virtual courses and summer camps** - e.g.
   - Denver Museum of Nature and Science - virtual science class for students and school classes
   - Children's Museum of Pittsburgh has begun a series of week-long virtual camps

4. **Plan an Online Fundraiser or Gala** – e.g.
   - Institute of Contemporary Art Boston held its first-ever Virtual ICA Gala
5. **Try a 'Pay-what-you Want' model** – to address concerns about accessibility and/ or alienating audiences.
   - National Museum of African American History and Culture, for example, is hosting "Yoga for Black Lives Matter"
   - Phoenix Art Museum created a similar program, establishing a "pay-what-you-want" approach for virtual events like live storytelling and guided meditation.
6. **Monetise special interactions with staff** - create opportunities for special interactions with staff and other experts, like curators and artists

How Are Museums Making Money Online? - MuseumNext

Pre-Covid (not virtual):
Overnight Visits - offered overnight stays to visitors who are willing to camp out on their premises, some theming their provision on a 'Night at the Museum' model.
Gala or so-called black-tie events - where paying guests might attend a dinner and dance, either on the institution's premises or elsewhere.
Virtual:
Artefact Adoption - patrons adopt particular items in a collection - suited to both in-person and online revenue generation. e.g., RAF Museum which is now successfully running a fully digitised adoption scheme for its many historic artefacts.
Virtual Visitor Donations - ask visitors to make a donation so that can continue to provide their services freely e.g., Wikipedia.
Commercial Sponsorship for Online Content – provide virtual content for free but promote a commercial sponsor. This sort of model will offer an advantage over donations, whereby income streams can go up and down outside of your control. Essentially, striking a deal with a commercial sponsor will allow you to budget more easily because you will know in advance how much your sponsor is willing to pay for the level of sponsorship on offer.
Of course, choosing sponsors is not without controversy. Several large public institutions have come under fire for commercial sponsorships with oil and gas companies in the past, of course. Big pharmaceutical companies have sponsored wings of galleries and both temporary and permanent exhibitions and these decisions have meant protests as well as disruption, in some cases.
Premium Online Offerings - sell virtual tickets to premium online offerings/ limited edition content in advance, with the rest of online content free to view, whether it is sponsored or not. i.e., majority of content is free and operates as a loss leader – as commercial operators tend to refer to it – then specially curated online content can be charged for. This sort of income stream can build, too. As you get used to what your paying audience likes to see, so you will be able to adapt your style to their preferences. In many cases, it will be possible to enjoy plenty of word-of-mouth recommendations that ensure future paid-for content becomes more popular. Typical premium online offerings would include access to behind-the-scenes operations, virtual gallery tours of newly curated content and even games and activities that support the learning of your freely available content.
Web Advertising - web advertising is put in place according to the surfing history of your visitors. Typically, these ads are run by services from Google and others. The more visitors you have to your site, the more such web advertising will generate in terms of revenue. That said, there is necessarily some compromise that will be needed for the look and feel of your museum's website.

Virtual Fundraising Events - A good example is the Manhattan-based Museum of Arts and Design which hosted just such an event, featuring a number of virtually live performances last year.

Online Staff Interactions - Chatting to educators, curators and other museum staff - add greater context to the various displays and personalise the experience and make it much more meaningful. Setting up online interactions with staff will mean a proper booking system needs to be put in place e.g., zoom or What's App.

[5 Pretty Simple Ways to Increase Your Museum's Revenue (museumhack.com)](museumhack.com)

Day lockers for the win - Purchasing just a few coin-operated locker units from your local hardware store will not only provide an extra convenience for your visitors but also add a small, no-maintenance revenue stream to your museum. Here's how much a museum could earn with just 10 day lockers rented twice a day at $1 each:

- 10 x $1 = $10
- x 2 rentals per day = $20
- x 7 days a week = $140
- x 52 weeks a year = $7280

Make donating easy (and fun) -
- invest in eye-catching donation boxes throughout your displays to gently encourage visitors to contribute when they're enjoying your museum the most.

E.g., The [Pitt Rivers Museum](#) spent £3,000 on a unique donation box with automated carved wooden figures that point and stare as visitors approach, encouraging them to donate into a copper bowl. When money is dropped inside, the figures bend over to inspect it. This unique donation box has more than paid for itself, and collects £4,000 to £5,000 per year

- Could you turn your donation box into a display, activity or learning experience?
- Can your museum accept donations via card or online?
- What about different currencies?

Become the coolest venue on the block –
- **Private Events -** corporate away days, to weddings, to photo shoots. This revenue stream isn't completely maintenance free – it'll require some staff time to sell the space, coordinate bookings, and arrange any necessary operational details. Added bonus on top of the cash: it's free advertising that encourages event attendees to come back as visitors.

Try out some trails –
- Develop a great gallery trail that sell to visitors - provide a new narrative or interpretive layer that might not be fully explored in your existing exhibits, tours, and audio-guides. They are particularly useful for engaging an audience who isn't specifically catered to in your exhibit interpretation, such as children, teens, or any visitor with a specific subject interest.

Host a movie night - does your museum have a lecture theatre or a room with a projector and some chairs? It could be the coolest new movie theatre just waiting to be discovered. Grab a few bags of popcorn, pick an old movie that suits your museum's audience and theme (be sure to check copyright permissions), and start selling tickets!

[Museums and New Business Models – The Association For Cultural Enterprises](#)

Sale of Museum -related products - produce products such as jigsaw puzzles and face masks. e-commerce presents opportunities to develop sustained relationships with external audiences. Requires a shift in thinking ***from souvenir-focused merchandise to creative ways for audiences to engage with museum collections*** beyond their walls. Moreover, they have the capacity to increase income streams while expanding meaningful learning opportunities.

Sale of digital content, stories and experiences - need to shift digital storytelling techniques from ones replicating in-person experiences (such as online catalogues and virtual exhibitions) to more dynamic forms of digital creation for which visitors are willing to pay. This may include ***narrative-driven content, bespoke curator tours, or live events*** like virtual escape rooms. The second is to find appropriate methods of commercialising such content, an approach sometimes at odds with long-standing attitudes within the sector of maximising access. E.g., The Met Unframed, a time-limited experience at the Metropolitan Museum of Art, New York, which encompassed animated artwork, interactive games, and virtual loans that allowed the visitor to experience the museum in new ways. The Met Unframed was free (sponsored by commercial partner Verizon), but the experience could easily be monetised through ticketing or charging for additional extras, such as the loan of virtual artwork (similar to in-app payments). This could be a single payment or provided as part of a digital membership scheme.

Building digital communities - an extension of traditional museum membership schemes, which typically incentivise repeat in-person visits through perks like free exhibition entry. ***Subscription platforms*** such as Patreon bring together geographically dispersed communities around digital content creation. While creating special content for those willing to pay a fee may appear exclusionary, it is ***arguably less elitist*** than member lounges and exclusive receptions, which are often a feature of membership schemes. Such digital communities can reduce barriers of physical and social capital to an actual museum space (although it could also erect barriers to those without Internet access), shifting emphasis to supporting a museum's cause. This could create a broader community of supporters, providing an additional regular income stream.

Collaboration is Key - The development of off-site revenues relies on convincing visitors they can meaningfully connect with a museum without being on-site. This can be achieved by engaging audiences through sustained off-site retailing, engaging and exclusive digital content, and digital membership schemes that provide a sense of community. The resources needed to achieve such diversification may be daunting, but it also presents opportunities to collaborate with entities across the creative economy, such as startups, universities or other museums. .. These off-site strategies are not designed to detract from the experience of visiting museums, but to encourage the creation of meaningful experiences that can be delivered beyond their walls, in order to expand audiences and generate the resources needed to ensure their future financial resilience.

Fundraising

List of ideas in articles below:

1. Trust and Foundations
    a. Specific to museums and heritage
    b. Specific to particular groups
2. Individual Giving
    a. Major Donors
    b. Supporter groups
        i. Membership/Friends
        ii. Patrons
3. Gifts in Wills/ Legacy Giving
4. Donation Boxes & Cashless Donations
5. Public Funders
6. Postcode Lottery – organised into separate regional trusts.
7. Landfill Communities Fund (via Entrust)
8. AIM
9. The Architectural Heritage Fund which focuses on acquisition, reuse or redevelopment of buildings which are of historic or architectural important
10. The NESTA Arts Impact Fund.
11. Crowdfunding
12. Public Giving Campaign
13. Online Giving
    a. Via tickets – if get Gift Aid
    b. Via online giving platform – Charities Aid Foundation, Just Giving, Donor Box
    c. Encourage regular giving
    d. Crowd funding
14. Gift Aid

Successful Fundraising at Museums - AIM - Association of Independent Museums (aim-museums.co.uk)

'*For the purpose of this guide, we are defining fundraising as the creation of **philanthropic revenue or capital investment.** We are not therefore including activities that are better defined as income-generation, generally the sale of goods or services (including admissions). Some activities, such as membership, blur the lines of this definition but are included because of the role they can play in the cultivation of supporters*'

'*..current economic challenges may make it even more difficult to achieve hoped-for results. The temptation may be to do nothing and wait until times improve. That would be a grave mistake. Now is the time to be investing in relationships, ensuring your systems and processes for fundraising are in place, and communicating confidence in your museum's future path.*'

'*There is still money to be found for well governed, resourceful organisations with robust plans and projects, who build strong, respectful relationships and ask for funds at the right time and in the right way*'

What do you need to Fundraise?
- Effective leadership and governance structures
- A clearly articulated purpose
- A robust business plan laying out current and future aims and detailed, realistic propositions to achieve them
- A financial plan proving sustainability, or progress towards it
- External evidence to support the need for the organisation, its work and any projects to be funded
- A case for support which draws on all the information above to answer the question 'why should this museum be supported?'
- A fundraising strategy developed with professional expertise if possible
- An internal team of people, staff and/or volunteers, who have time to dedicate to fundraising and understand the roles they play
- The support of its community – especially volunteers and members who can act as advocates
- Established ways to communicate with its community and wider audiences
- Systems to manage data, track relationships and plan/monitor actions
- Financial processes to accept, monitor and report on funds received.

Prioritise:
- Trusts and foundations
- Individual giving – from major donors and from supporter groups, e.g.: members
- Gifts in wills
- Donation boxes.

Public Funders of Museums in Wales:
- National Lottery Heritage Fund
- Welsh Government Culture Division
- Cadw
- Local authorities (e.g., Section 106, Community Infrastructure Levy)

Identify trusts:
You can use a subscription search engine such as the Directory of Social Changes' Funds Online or the free Heritage Funding Directory, managed by The Heritage Alliance and the Architectural Heritage Fund.

Major trusts who regularly give to museums and heritage organisations:

- Garfield Weston Foundation
- Wolfson Foundation
- Esmée Fairbairn Foundation
- Foyle Foundation
- Pilgrim Trust

Other Trusts:

Trusts who fund projects that deliver outcomes to particular groups of beneficiaries, e.g.,: the elderly, young people with learning disabilities, young carers etc. *These trusts will be useful in funding your social impact, learning and community work but won't necessarily have a history of funding museums.*

Members, friends and volunteers:

friends or membership scheme - low-cost programmes - based on multiple admission benefits plus additional events and possibly discounts. If museums use an 'annual pass' form of Gift Aid ticketing, the benefit of membership programmes can be compromised (both to the organisation and to the member) and care needs to be taken to ensure they remain profitable and appropriate to the motivations of the members. Also, they can present a risk that such a generic approach satisfies no one. Regularly surveying friends/members to be sure of motivations and preferences can help ensure a membership programme remains relevant to its members and worthwhile for the museum.

Higher level membership programmes, often referred to as Patrons, need to be established with great care. As described below, major donors (often the same people) need to be treated as individuals and trying to herd them into a 'scheme' may not be the best way to cultivate relationships.

When launching a fundraising appeal, the best starting point is with those closest to you – your members, friends and volunteers. They are already committed to the organisation. However, just because they are already involved and have shown that they care about the organisation, doesn't mean they will feel minded to give to an appeal or capital campaign. You will need to ensure you bring these people with you as you develop plans for the future; that you keep them informed of progress; and that you listen to their views about the museum's direction and plans. Newsletters and virtual briefings are great ways to engage these supporters, and the occasional survey in which you investigate their motivation for support as well as their satisfaction with the organisation, can be extremely useful. Being able to talk to them individually at events is invaluable. Don't ask supporters for money too often. In addition to friends/members subscriptions, it might be appropriate to run an appeal in alternate years.

Major donors:

A major donor is someone who makes a sizeable gift to the organisation. They may or may not be a friend, member or volunteer. They need to have both the capacity and the motivation to give – just being rich isn't enough. When attracting new donors, it will help if there is a personal connection to the organisation – hence the important role trustees can play in introducing people. Cultivation and stewardship need to be personal and tailored to each individual to enable them, and you, to build a close relationship. Do not rush to ask a potential donor to give their support but allow time for the relationship to develop. You are much more likely to get a positive response, and potentially a larger gift as well. Examples of opportunities to develop these relationships include:

- Behind the scenes tours
- Opportunities to meet experts before or after a larger event, e.g.: a lecture
- Identifying and sharing an object or collection of particular interest to the donor, e.g.: local to their home
- Coffee, tea and lunch meetings.

Business:

There has been a steady decline in corporate giving in recent years - Corporate membership has been badly hit during the pandemic - Business sponsorship continues to benefit London-based museums disproportionately.

Need to consider two questions: Once you have factored in the benefits (in resource and cash) you will need to deliver to the sponsor, and taken into account a realistic income, is a sponsorship likely to be profitable? Would the time you spend approaching, negotiating with and then delivering to a sponsor be used more profitably pursuing a different fundraising avenue?

Other:
- Postcode Lottery – organised into separate regional trusts.
- Landfill Communities Fund (via Entrust)
- AIM
- The Architectural Heritage Fund which focuses on acquisition, reuse or redevelopment of buildings which are of historic or architectural important
- The NESTA Arts Impact Fund.

Gift in Wills:

Need to offer guidance to supporters on why and how to make a gift in their will and use all communications channels sensitively but consistently to reinforce the message that gifts in wills are essential to the future of the museum.

It helps to have a legacy policy, approved by trustees and describing how unrestricted legacies will be allocated. It can be off-putting if a potential donor thinks their money will be spent propping up the revenue budget – indicating that funds will be allocated to conservation, acquisitions, education or a long-term invested fund to create revenue will be much more appealing.

On-line Giving:
- Via tickets – if get Gift Aid
- Via online giving platform – Charities Aid Foundation, Just Giving, Donor Box
- Encourage regular giving
- Crowd funding

Onsite Giving:
- Donation boxes
- Cashless donations – text, QR codes

Gift Aid:

Charities can apply to HMRC to register for gift aid, which increases the value of donations from individuals by 25%

Income-Generation-and-Fundraising-for-Museums.pdf (sharemuseumseast.org.uk)
Case studies from East English Museums including:

Donations:
- Consider what compelling and timely reason you can offer to encourage people to donate, for example a birthday or an anniversary of something related to your collection.
- Think about what will motivate people to donate to your cause.
- Put out a strong, compelling message to potential donors and be clear about how people can donate.

e.g., Museum of East Anglian Life – designed a piggy bank to look like a heritage breed at the museum, visitors encouraged to 'adopt' a pig for £5, take it home and 'feed' it and return to the museum when full.. £16, 000 target – achieved £11,500 within first few months of scheme.

- Position your donations box somewhere that is uncluttered, so the box is easy to see and access. Perspex boxes work well as visitors are more likely to make a donation if they can see money in the box, and if they see notes, they are more likely to give notes.

Giving:

- Suggested giving amounts make it easier for donors to give, can motivate donors to give more, and help people understand the impact their donation will have on your organisation and those your organisation supports. Offering defined choices, or suggestions, also gives donors a better understanding of what might be considered a small or larger contribution.
- Using an online giving site which shows how much other people are donating can drive up average donations as people will look to see what others are giving and usually give a similar amount.
- Monitor the amount individual donors give and, if required, alter the suggested giving amounts. For example, if you find people tend to give much more than your lowest suggested amount, you might increase this amount.

Legacy giving:

- Have a leaflet or a page on your website promoting legacy giving, sensitively targeting your existing supporter base – they are the people most likely to want to leave you a gift in their will.
- Distribute your legacy giving leaflet to local solicitors' offices. When people go to make a will, the solicitor may ask them if they have considered leaving a gift to charity. Whilst they can't make any specific recommendations, they can offer local charities' leaflets to browse.
- There are a lot of misconceptions about legacy giving. It is worth finding out how to promote legacy giving well. Get the facts and find out how it works by attending training or from books and online resources on the subject.

Crowdfunding:

- People need to care about your crowdfunding campaign. You are more likely to get donations if you present a real, tangible problem that donations can solve or if you create a product that people want to support.
- Perks, or rewards, are vital. These do not have to be hugely costly. What can you offer to encourage people to donate?
- Start raising awareness before you start the campaign and, once running, make the campaign a high priority. Crowdfunding campaigns should preferably be around 6-8 weeks, and definitely no longer than 3 months. Short timescales help campaigns to maintain a sense of urgency and make it easier for staff and volunteers to sustain momentum.

Public Giving Campaign:

- A celebrity endorsement can make a huge difference to a public campaign, further legitimising the ask and widening your audience.
- It is important to keep people interested in your project. This is why it is a good idea to build a relationship with your local press and plan regular press releases to share information and updates as the project progresses.
- A clear social media strategy is imperative in engaging audiences and creating a buzz around your project.

Admission Charging

Income Generation in London's non-National Museums_FINAL (museumoflondon.org.uk)

Income from admission charges is **not as important for museum finances as might be expected**. ..Most of those museums that have admission charges charge for general admission (20 out of the 26 that charge) - 11 respondents said they charge for admission to special events and exhibitions. 4 museums have a friends or membership scheme, which gives free entry in three of the museums and a reduction to the entrance fee in the fourth. Two of the charging museums offered free entry with a National ArtFund Pass, and one with a London Pass.

A112 Executive Summary: Taking Charge - Evaluating the Evidence (aim-museums.co.uk)

KEY FINDINGS

♣ There are no defining characteristics that distinguish charging or free-entry museums, and the picture is much more complex than often assumed, since one in three independent museums are free-entry and one in three local authority museums charge for admission.

♣ There is **no direct link between the diversity of audiences and whether a museum charges** for admission or not, with the pattern in terms of social mix being very similar. However, **such a finding needs to acknowledge that the general social mix of museum visitors is not always representative** of the wider social mix within their communities.

♣ **Donations** are more affected by a range of other factors than by whether museums charge for admission or not.

♣ There is **no consistent relationship between levels of secondary spend and whether a museum charges admission**, with other factors having much more influence. However, some evidence has emerged showing visitors to charging museums are more likely to have visited the shop (or used on-site catering), than visitors to free-entry museums.

♣ **Dwell times are typically longer** for museums that charge for admissions.

♣ The process of **charging creates a focus for the visitor welcome and captures information about visitors**. Where museums are free entry, alternative approaches are required for these elements.

♣ In making any changes it is especially important to communicate clearly with stakeholders and the local community about the reasons for the changes and to ensure that staff are positive and confident in explaining them to visitors.

Audiences

Understanding Your Audiences 2020 (aim-museums.co.uk)

Understanding your audiences, **knowing who they are**, their visit behaviour, their motivations, their needs and expectations, brings a huge amount of insight into helping you to make your organisation resilient. **Knowing who isn't engaging with you**, but who has the potential to become a visitor, is also important in being able to build and diversify your audience base - why don't they visit at the moment and what would encourage them to do so

To understand audience, need a mix of data e.g.,

- quantitative data -
    - compare **visitor demographics** with those of your local population to see if you reflect these characteristics e.g., age, gender, ethnicity, disability, economic status, life-stage, public health issues, deprivation indices);
    - look at **national data** on the percentage of people in the UK who visit museums, galleries and heritage sites to give context to your overall potential market – 'Taking Part' annual survey DCMS/ Welsh National Survey, Census etc.
    - look at Local Authorities and Clinical Commissioning Groups (CCGs) within the NHS **local population statistics** to understand key issues facing the people who live close by, such as levels of deprivation and public health and wellbeing.
- Qualitative data –
    - **Visit behaviour** (frequency, length of visit, who they visit with, what they go and see, how much they spend)
    - **Attitudinal and motivational information** (e.g., what their motivations are for visiting, such as social or educational, or their attitudes to specific elements of a visit);
    - **Geoanalysis and geodemographic** profiling (a way to classify types of customers based on the sorts of residential areas they have been drawn from using postcodes, e.g., CACI's ACORN and Experian's MOSAIC);
    - **Area Profile report from the Audience Agency** – have to pay - detailed summary of data relating to a catchment area (based on your selected drivetime area) and the demographics and cultural engagement of the people who live in it
    - **Segmentation models** that use a mix of these approaches with an emphasis on cultural and arts profiles

How to get data - from your existing visitors and your potential audience as well

- Face to face surveys
- Staff counts / clickers
- Observational research
- Online surveys
- Feedback walls with focused questions
- Focus groups
- 1:1 telephone interviews
- Advisory panels
- Journey mapping
- Voting mechanisms - e.g., put a tick against your favourite exhibition idea, put a ball in a bowl, sticker on a list
- Creative feedback - e.g., draw a picture to reflect your experience

Low or no cost ideas to try:

● **Have a conversation** - talk to your audiences, listen to their answers and factor these into your decision-making
● **Feedback walls** - these work well when you prompt feedback by asking a well-planned question and change it regularly
● **Ask another local venue** if you can set up a stall to talk to their customers about your programmes - try the local library for starters, they could be a good source of potential visitors
● **Collect postcodes** from your visitors at your admission point, collate and analyse them on a regular basis to build a picture of where your visitors come from over a year.
Use www.openaudience.org to analyse your postcodes for free
● **Organise a focus group** or discussion with your target audience - go to a venue where they already congregate (with the venue's permission!) and be ready with your questions, e.g., talk to parents and carers at a soft play centre, go to a teachers' network meeting, go to a knit and natter group, talk to a youth theatre group.
● **Use an online survey** service such as https://www.surveymonkey.com or https://www.quicktapsurvey.com and send a questionnaire to your database or seek permission from other organisations so they send a link to their database too so you can consult potential users as well as your own users

Interpretation and Displays

[AIM-Succes-Guide-Museum-Displays-and-Interpretation-FINAL-smaller.pdf (aim-museums.co.uk)](AIM-Succes-Guide-Museum-Displays-and-Interpretation-FINAL-smaller.pdf)

Interpretation is the way that we connect visitors or audiences to our historic places and collections, it is how we communicate stories and ideas about our heritage. By reviewing and considering our interpretation we can promote equality and inclusivity. The AIM Hallmarks say we need to '*develop and understand our collection, identify missing perspectives and histories and use them to encourage debate and discussion'*

In order to create successful interpretation, we need to understand our audiences and the heritage that we wish to interpret

We need to know what current visitors like or don't like. This information can be obtained through surveys or by chatting to visitors in the museum. A focus group can help to gain more nuanced responses and answers to specific questions.

To learn about new audiences, we need to ask and listen to a wide range of views. Ideally, this should be done early on in the planning process, and at regular points through the design stages. This can also include people with particular needs or interests.

Co-curation takes audience engagement further and invites people to come on in and help us design and interpret our collection. True co-curation is about giving equal control and decision ..Derby Museums use a toolkit called Human Centred Design which provides ideas and new ways to involve people in the design process.

Museums and public places are required to provide equal access for everyone. The Equality Act 2010 makes it unlawful to treat disabled people less favourably than others. Museums must make reasonable adjustments to how people access the building and services. Any new interpretation should consider the needs of disabled people. Access is not just about access for people with disabilities, other things to consider are people of different ages, language and varying resources, such as financial and time constraints.

Planning for the future

[Future Proof Museums - Arts Marketing Association (a-m-a.co.uk)](Future Proof Museums - Arts Marketing Association)

Future Proof is a change-programme to improve resilience of museums across England.

[Future-Proof-Museums-notebook-WEB-SPREADS-1-2.pdf (culturehive.co.uk)](Future-Proof-Museums-notebook-WEB-SPREADS-1-2.pdf)

Resource with useful questions for museums to ask about their sustainability and how to adapt.

Future-Proof-Resource-WEB.pdf (culturehive.co.uk)

Provides advice and tools to test and review new business model and income generation ideas, including:

Creating a business case – examples and exercises re:
- Delivering on a vision
- Is it desirable?
- Is it feasible?
- Is it viable?
- Opportunity costs

Case studies cited:
- Eden Project
- Battersea Arts Centre
- National Justice Museum
- Derby Museums
- Harris Library, Museum and Art Gallery
- Manchester Jewish Museum

Future-Proof-Museums-Royal-Pavilion-and-Museums-Brighton-and-Hove.pdf (culturehive.co.uk)

One Example of Future Proof approach – Museums - Brighton & Hove – illustrates different approaches needed for different museums in Brighton & Hove and how Future Proof helped with this.

Review of Amgueddfa Cymru (gov.wales)

This is the review cited by Trustees – Dr Simon Thurley's review. Relevant findings to this Inquiry are:

1.2 The Welsh Government, under successive ministers, has recognised the importance of the Museum and of culture in its widest sense to Wales. The **Wellbeing of Future Generations (Wales) Act 2015 placed culture at the heart of decision-making** about the future of the nation. Most recently in its culture statement 'Light springs through the Dark' the Government has reiterated the benefits that Wales gets from both public and private investment in culture. Museums are seen to play an important role in this. Wales was the first country in the UK to publish a museums strategy in 2010 and two years ago a review was undertaken into local museum provision.

1.4 At times such as these it is **vital that funders and funded work closely** together to well defined and publicly articulated objectives. It is important that there is an appropriate division between policy and delivery; clarity over the technical framework within which objectives are delivered; assurance that the capability to deliver is sound; that a robust, but not suffocating, performance management system is in place; that feedback from users and employees is transparent and actioned appropriately.

Relevant recommendations include:

2. The National Museum Cardiff should **work much more closely with Visit Wales, Cardiff City Council and the Welsh Government** to position itself as a key part of the offer for tourists to Cardiff City Region.

6. The Welsh Government and Amgueddfa Cymru **develop a shared 10-year vision for Amgueddfa Cymru with a five-year focus and three year funding agreement**.

12. I recommend that Amgueddfa Cymru in future **charges for special exhibitions, establishes an appropriate customer relationship manager (CRM) system and a membership scheme** as soon as possible.

14.   Assuming the Welsh Government agrees flexible commercial freedoms for Amgueddfa Cymru, the Museum **appoint at Executive Board level a commercial director** at a salary that will attract a person of high calibre and wide experience of visitor attractions.

15.   The new commercial director introduces appropriate **charging regimes, CRM systems, membership schemes and management improvements in catering and retail** to expedite and develop the Museum's commercial offer.

16.   Amgueddfa Cymru reviews its **donations strategy, improves the physical infrastructure of donation boxes, and investigates ways of making an appropriate face-to-face ask** at each of its sites.

Wider Overview - Economic Impact etc.

National Museum Directors' Council - Written Submission to House of Lords Communication and Digital Select Committee Inquiry – A Creative Future - Sept 22

committees.parliament.uk/writtenevidence/111114/pdf/

Extracts:

As a **major employer in the creative industries**, museums are well placed to advise on and shape a creative future

The potential for **growth in the creative industries** sector is clear. Independent economic modelling laid out by Creative UK demonstrates that by 2025, the UK's creative industries could contribute £132.1 billion in GVA – more than the financial services, insurance and pension industries combined. The sector is also poised to create 300,000 new jobs by 2025.

Within the creative industries sector, **museums are particularly high generators of income for the wider economy**. According to Creative UK, prior to the onset of the Covid pandemic, for every £1 museums, galleries, and libraries contributed directly in GVA, an additional £4.40 was generated in the wider economy through supply chains.

Museums are a catalyst for economic development and scientific advancement, a major draw for tourists, an egalitarian community space, and the inspiration for current and future generations of pioneers, designers and community leaders. They preserve, protect and promote some of the UK's few irreplaceable assets: the nation's collective memory, knowledge and history.

Their submission covers the increasing digitisation of museums, the need to improve accessibility, the need to address climate change, the need to address collections and who owns cultural heritage, the need for investment and stable multi-year funding, the need for support for creative subjects at school and in higher education and the need for partnership working.

LGA briefing – Debate on local museums, Westminster Hall, House of Commons 7 March 2018

Debate on local museums, Westminster Hall, House of Commons, 7 March 2018

Key Messages:

- Councils are the biggest public sector investor in culture, including museums and galleries, spending over £1 billion per year, despite reductions in council funding from central government. There are 350 local authority-run museums in England, and more are supported through grants or contracts.

- Councils recognise the valuable role that museums play in helping to create places where people want to live, work and visit. This includes **attracting tourists, involving residents in local heritage, providing volunteering opportunities and valuable outreach work that can, for example, support older people's wellbeing.**
- Councils report particular **challenges with raising capital funding** for major projects and developments, as well as simply maintaining the historic buildings which often house collections. This is compounded by increased competition for external funds and difficulty in finding match funding.
- The LGA's survey of museums found that many councils identified European funding as a source of existing or potential income. The Department for Digital, Culture, Media & Sport (DDCMS) must consider the impact of Brexit on the local cultural sector, and whether alternative provision needs to be made.
- In order for local arts and cultural services to continue to thrive, we need the Government to recognise the need for investment in these services, to advocate the economic and strategic value of museums cultural services, and to steer national policy in a way which reinforces collaboration between sectors, and between national and local museums.

Senedd report on pandemic impact on heritage & museums 2020

[cr-ld13401-e.pdf (senedd.wales)](cr-ld13401-e.pdf)

Recommendation 3. The Welsh Government should ensure that museums, archives and heritage sites are **adequately resourced**, in terms of expertise and infrastructure, **to provide digital access** to, and online engagement with, their collections.

Recommendation 4. The Welsh Government should **draw up a strategy for increasing digital access** to our collections which is:

- planned, properly funded and visionary;
- developed alongside education providers to deliver the National Curriculum; and
- Recognises the benefits to mental and physical health and seeks to deliver outcomes for the National Health Service.

Recommendation 5. The Welsh Government should revise the way in which funding is decided for museums, libraries and heritage sites to **take into account increased digital delivery** and compensate for reduced commercial income

Recommendation 7. The Welsh Government should set out how any additional funding for the cultural sector will be used to **mitigate social exclusion and increase access** to our heritage sites, libraries and museums

[gen-ld13469-e.pdf (senedd.wales)](gen-ld13469-e.pdf)

Relevant Extracts from - Written response by the Welsh Government to the Senedd Report above:

Recommendation 3 – Accept:

The recently launched Cultural Recovery Fund provides **access to funding for digital initiatives** to increase online access and engagement with collections. The Welsh Government is working closely with sector bodies to review priorities for digital developments and support the sectors to access the necessary expertise and training. The Welsh Government's Culture and Sport Division is responsible for administering the Museum and Archive Service Accreditation schemes in Wales. Digital access and online engagement is recognised as an integral part of service provision.

The Welsh Museums Festival, held for a week during the October half-term school holidays and supported by the Welsh Government, is being developed this year as a mainly digital festival. This is particularly important this year as it provides an opportunity to highlight that the museums are still there and very much a part of their local community, even when the doors of some might be physically closed.

Recommendation 4 – Accept:

Later this year, the Welsh Government will publish our '**cultural and sporting priorities'** setting out agreed priorities and direction for culture and sport through next year and beyond. An associated delivery plan, developed collaboratively, will agree actions and commitments from major partners and stakeholders. This will also include digital developments.

Both national and local museums and cultural organisations have provided on-line resources, events and activities to support learning, education and enjoyment during the pandemic. As part of the UK-wide Museum Accreditation scheme, which the Culture and Sport Division manage for Wales, **engagement with the National Curriculum is an integral part**. Museums provide a wide range of activities such as reminiscence boxes, mental health workshops etc. Many have undertaken training to become 'dementia friendly'. Projects have been part-funded by the Welsh Government.

Recommendation 5 – Accept:

Recommendation 7 – Accept:

As part of the £53m Cultural Recovery Fund, we have introduced a 'Cultural Contract'. This will encourage recipients of the funding to ensure public investment is deployed with a social purpose. This will include areas such as:

• Fair Work
• Board diversity – gender, Welsh language, BAME representation etc.
• Retained staff to support wider initiatives e.g., contact tracing to support Test, Trace, Protect
• Social prescribing
• Supporting health & arts initiatives