

Future Museums Project – Interim Summary Report August 2014

Introduction

The following report is a summary of activity and delivery of the Future Museums Project since October 2012. Since the start date the Project has evolved to cope with changes in pressures and directions agreed through the Future Museums Project Board including Arts Council England. Some of the key issues to highlight in the context of the summary are as follows:

1. The two reports on Options regarding governance at the Museums illustrated that changes needed to be made for a sustainable future to be possible. Regardless of changes in governance and indeed in methods of operation one thing has been made clear – given the investment from HLF and ACE into the Museums of Torbay a period of further sustainable grant aid from Torbay Council is needed to allow time for new structures, governance and working arrangements to pay dividends. Funding from the Council, at least at the current level, for two years from April 2015 would give sufficient time and support for transition and new operations to be fully implemented. Thereafter a gradually declining level of Council support might be appropriate.
2. The budget information (and staffing levels) set out in the Black Radley report has been overtaken by events. For example Torquay Museum's budget has changed radically with staff cuts and other cost savings that have been implemented. Revised budgetary information is currently being prepared.
3. Joint activity with other organisations (not accredited Museums) are actively being pursued to improve income streams – partnerships with commercial organisations are viewed as part of future delivery. For example a Joint Heritage Pass has been launched for the three Museums together with Kents Cavern, after a review in Autumn 2014 this may be expanded to include other heritage attractions. Joint education activity is also being delivered alongside Kents Cavern. Hotels are being contacted with a view to developing a strong joint offer to groups visiting Torbay.
4. The creation of the Kents Cavern Foundation is also significant. Close working and cooperation with Kents Cavern is being further explored.
5. The emerging Torbay Culture Board will clearly have an overarching influence on the future of the Torbay Museums as part of the total cultural offer of Torbay. Once the new Cultural Strategy has been adopted by Torbay Council (expected date 25 September 2014) we will have to see how this will benefit the museums.

Brief project overview

This project aims to lay the foundations for a new, more sustainable future for the Museums of Torbay. The three accredited museums of Torbay, Torre Abbey, Torquay Museum and Brixham Heritage Museum are a significant cultural, community and economic resource situated in the 2nd largest population centre in Devon.

The project intends to grow our value to our communities and economy, understand our audiences better and increase their range and spread by developing a range of exhibitions, events and education programmes. We will make significant changes to the way we operate to ensure that our

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business planning and operational facilities are fit for the 21st Century. This project will play a major part in setting us on that ambitious change programme.

Outline of activity and delivery

Start-up

On behalf of the Future Museums Project, Torquay Museum Society received formal notification of the Renaissance Strategic Support grant (from Arts Council for England) on the 26 September 2012. With a presumed project start date of 1 October all the partners rallied round and moved quickly to facilitate the recruitment of the five members of project staff. The Project Manager post was interviewed for on the 18 October and the successful candidate - **Basil Greenwood** - formally began work on 23 October.

Interviews for the remaining four posts were quickly set up and took place over the next two weeks with the successful candidates beginning work with a full day induction on 12 November. The posts filled and successful candidates were as follows:

- a. Programme and Events Developer Officer – **Nathalie Palin**. Panel comprised Basil Greenwood, Alan Davies, Anna Gilroy.
- b. Geohub Education and Outreach Officer – **Leah Witcher**. Panel comprised Basil Greenwood, Alan Davies, Mel Border. With input from Philip Armitage.
- c. Funding Officer – **Stuart McMillan**. Panel comprised Basil Greenwood, Alan Davies.
- d. Project Administrator – **Amie Schofield**. Panel comprised Basil Greenwood, Alan Davies.

Project Management

Upon starting, the project manager established a project schedule along with a breakdown of activities with proposed delegation amongst project staff. Meetings have been held with key partners including regular sessions with individuals from Torre Abbey and Brixham Museum.

A new Future Museums Project Board was constituted and met for the first time on 2 May 2013. Thereafter it has met monthly. Representation from the three Museums is as follows: Dave Butt, Alan Davies, Phil Collins, Richard Sale and Phil Armitage.

Governance and organisational resilience

1. The Future Museums project has sought to ensure the museums move towards a more sustainable future, in part by identifying and assessing more effective future business models for museum delivery.
2. An initial options appraisal was carried out by Devon Square Partners Limited during the early part of 2013. The report (**Annex A**) found that the current method of operation was not ideal. This initial work envisaged that a new higher level body would be created that would be the commercial equivalent of a holding company. It would represent and galvanise the business part of Torbay Museums, freeing up Torquay Museum Society and Torbay Council from main line commercial considerations. It was proposed that while Brixham Heritage Museum is part of the 'consortium club', it maintains its own legal standing and current arrangements.
3. The museums then appointed Black Radley Culture (BRC) to carry out further work on the options appraisal for the future governance of the three museums. In particular the museums wanted this work to drill down into the detail of what a new trust would look like and the delivery and financial benefits this brings.

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4. One of the key drivers explored by the report was the desire to reduce the Torbay Council subsidy from £261k to a potential £100k. The report concludes (see Executive Summary and full report – **Annex B**) the following:
 - a. It is highly unlikely that any form of sharing, cooperation or merger between the 3 museums can close such a potential subsidy gap.
 - b. It is possible that a change in the museums' governance model could result in an increase in commercial revenue (e.g. trading). This "enterprise dividend" is associated with increased management freedoms. Even if such changes were made, they are unlikely to deliver sufficient net margin to close the gap.
 - c. Given the circumstances, it is hard to see a sustainable model for the three museums without closures and/or substantial reductions in activity.
 - d. The development of a new trust, incorporating the existing three museums, incorporating two of them, or incorporating some of what they do, could be counter-productive. Substantial management time is typically required to create stakeholder alignment. This management time would be better spent on improving the individual museums' commercial offer, and on capturing the resultant revenues, rather than dealing with the politics of complex change.
5. The final phase of Arts Council funding (2014-15) is actively supporting a change programme. Key strands are set out in the 2014-15 plan as follows: Governance and transition, marketing, education, collections management, forward planning and grants. The Project is pursuing closer operational working in these areas to deliver efficiencies and better delivery with the intention of improving the offer and exploiting the 'enterprise dividend'. A budget is available to support this with a major focus on joint marketing, exploring the legal issues around any merger and finding solutions. **Annex C** sets out the programme and reports on 2014/15 Quarter 1 progress.
6. Torquay Museum is now signed up to a transition programme through its HLF funded programme. This will enable the separation of Torquay Museum Society from the day to day management of the museum (once the Society's concerns are met). Business and legal specialists will be employed to examine and clarify the legal issues associated with the preferred option for governance of the museums in the future and the separation of Torquay Museum from the Torquay Museum Society, these include:

- The establishment of a new legal entity to house the activities of Torquay Museum (and potentially Torre Abbey).
- The amendment of the existing or establishment of a new legal entity to house the activities of the Torbay Museum Society following separation.

Work required:

- Preliminary legal support to Torquay Museum Society (the Charity) working alongside other consultants during the process of formulating detailed proposals for a revised governance structure, eg attending project group meetings, providing initial legal comments on proposals, commenting on any initial communications/consultation with wider membership and Future Museum partners.
- Preliminary legal input to support more detailed discussions with the trustees, representatives of the wider membership and the Future Museums Partnership in determining the restructure proposals.
- Consultation with and explanation of the proposals to the wider membership of the existing Charity.

For the implementation phase the consultant will provide appropriate legal advice to support the implementation of the agreed new governance structures:

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- developing the articles of association for the new Charity potentially following a 'Foundation' model that reflect the proposed revised governance structures; discussing and agreeing these with the Trustees, partners etc.
- developing a new entity (perhaps a Charitable Incorporated Organisation (CIO) if needing to have charity status) to run the non-museum activities of the current Torquay Museum Society.
- applying for and obtaining any required Charity Commission consents for a new charity(ies) or the amended articles of the existing charity.
- preparing board and member resolutions/EGM notices etc in relation to the proposed changes, the adoption of revised articles of association and attending to filings at Companies House and Charity Commission.
- dealing with the transfer of any assets and liabilities specifically relating to the 'Society' aspect of the existing charity which are required to transfer to any new entity as part of the separation, including drafting a short form asset transfer agreement.

As part of this transition programme for Torquay Museum it would seem appropriate to actively use the process to examine related issues around bringing Torre Abbey into any new Trust that will be formed. Such a process can then be supported by monies set aside in the Future Museums budget to run alongside the HLF Transition monies. The Future Museums Project Manager can also actively support the process.

7. **Business Plans** have been developed for both Torquay Museum and Brixham Heritage Museum in 2013.
8. **Finance systems** have been reviewed at Torquay Museum and recommendations have been implemented through a Finance Manager and the Project Administrator. This has involved the purchase and adoption of Sage accounts package and the implementation of new financial systems.
9. **Cost savings** have been implemented at Torquay Museum which have resulted in approximately £30k of savings (**Annex D**). This must be seen in the context of an annual deficit budget which has been of the order of £90k. Further savings have been implemented through a staff restructuring but there is still a shortfall in funding which is being pursued through the TQM HLF Transition Project. There is also the proposed cut in the Torbay Council grant of 42% to factor in.

Fund raising development

1. After a period of consultation with various staff members, including workshops, the Funding Officer drafted a fundraising strategy for Torbay Museums in 2013. The strategy gives both a collective and individual strategic overview on corporate hire, business membership and general fundraising, on line fundraising, fundraising campaigns, fundraising steering groups, legacies, gift aid, grants (covering the 3 main types of grants), sponsorship, influential targets and special events. The strategic view provided by this fundraising strategy is part of developing a coherent and effective collective approach to benefit all three museums.
2. Marketing materials have been developed that include a corporate hire booklet, folder for fundraising, posters for on line giving (JustGiving), online development with social media sites.
3. A data base of companies has been developed for fundraising purposes which is available to all 3 museums. It has been designed to work with mail merge and allow easy targeting of companies. Draft fundraising letters have been developed for all three museums with attachments for general or specific fundraising. The data base allows for easy monitoring and ring-fencing to ensure that companies do not receive multiple approaches from the museums.

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4. A number of Applications have been drawn up and submitted to the Ellerman Foundation, Olfson Trust, Charles Hayward, JP Getty, Idlewild Trust, Liche Trust, HappyMuseums. Many of these have not been successful but a number of small grants have been received including a £24k from Happy Museums for Torquay Museum.

Front of House IT and Systems

1. A Review has been undertaken of front of house data gathering IT and till systems as a result of which Merac were contracted to provide new front of house and shop till system. New systems allow analysis of admissions data, gift aid, financial and data reporting. Systems were successfully installed in December 2012 with training carrying on into January 2013. Postcode lookup software has been added to the package to facilitate gift-aid.
2. These new tills were installed at both TQM and Torre Abbey.
3. Gift aid is now being accurately and easily recorded at TQM resulting in higher amounts of gift aid being obtained and easier data submission to HMRC. An electronic diary is being utilised for room bookings, etc. that is easily accessed and maintained. The Till system enables faster and easier 'one entry, one touch' diary-event- invoice procedure. Shop and café stock has been entered onto Merac till system for easy and accurate stock tracking and reports. Bar code scanners have been installed for easier and quicker transactions. The Merac Back Office software now enable's various reports and data to be created from report menu for financial, stock checking and marketing purposes. The benefits of Torre Abbey joining the new foundation trust would include the ability to retrieve gift aid on all tickets sold. The local authority is currently unable to do this.

Environmental sustainability appraisal and works

1. An on-site appraisal has been carried out at TQM by EoN. This involved experts in the field of energy saving lighting systems, heating systems and solar panels. A solar PV assessment and costing has been provided and funding options are being actively explored by TQM. Advice on energy saving lighting has been utilised to source new lighting at TQM. The intent is to find funding to install solar panels at TQM, upgrade lighting to new energy efficient types when possible and to further investigate heating systems to provide a more energy efficient type.
2. At Brixham Museum the installation of better, energy efficient lighting in Mayflower, and Lifeboat displays and in the research rooms has taken place. Also some old, inefficient night storage heaters have been replaced and a new water heater has been purchased and installed. The Maritime gallery is also having energy efficient lighting and insulation installed to improve energy usage.
3. In Torquay Museum Devon Farmhouse gallery, new energy efficient, dimable, sensor activated lighting has been installed.

Programme and audience development

1. A new 'Monster Saturdays' initiative at Torquay Museum has been launched and marketed (online and print) to engage local families and children in the museum and its collections, through creative and science-based activities. The first event took place on 16th March 2013, the number of museum visitors that day was a 20-fold increase on the previous Saturday and almost all of the families were local to the area, and almost all had never visited the museum before. Following the strong track record of Brixham Heritage Museum in families work, Torquay Museum has also now joined Kids in Museums.
2. The Entry Fee structure at Torquay Museum has been simplified and changed in order to engage with local families and harder to reach groups. The combination of pay once re-enter all year is designed to engage with local population currently not using the museum. Also we

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have added a 'small families' price to demonstrate more flexible understanding of families needs.

3. The Programme Developer has been working with all three museums to identify targeted harder to reach groups that each museum will focus on in order to widen their audiences and increase access. These programmes will take into account staff skills, collections relevance and museum profile. For Torquay Museum there is a strong interest in working with disadvantaged young people, and supporting the communities 'wellbeing' agenda through Happy Museum initiatives, sociable activities for older people to tackle isolation, and families work. Brixham Heritage Museum already has a strong track record with primary schools, and their new programmes are likely to extend into secondary schools, and on working with Trinity Youth Trust to use the museum's maritime links to help develop young people's skills. They are also keen to develop a more dynamic events programme linking to Brixham community's public festivals programme. Torre Abbey is keen to look at extending informal education activities and developing their capacity to host community and public festivals and events. This year Torre Abbey will be the hub location for all the literary events for the new International Agatha Christie Festival.
4. In discussion with staff at each of the three museums, the Programmes Developer has drafted Needs Assessments, and based on these, she has been developing museum programmes addressing exhibitions, events, education and outreach activities (in partnership with Geohub Education Officer). Torquay Museum now has an agreed programme of exhibitions for three years, with programming for: young people; adults; community outreach and wellbeing; families; and schools. Staff are continuing to add to this programme to develop it further. In parallel with this programme, the museum is continuing to work towards its Collections Designation. Torre Abbey's development has limited its exhibition facilities, but they have a draft programme of exhibitions for their 'Spanish Barn'. The broader programme for Torre Abbey is still in development due to the delays brought about by their extensive redevelopment. Their programme for the future will be built around audience development and special events, enhanced by key visiting exhibitions developed by the Arts Development Team.
5. The programme for Brixham Heritage Museum is also still in development. BHM are focusing on their 'Maritime Galleries' as a permanent improved gallery. They do not have the space in the museum for new large scale exhibitions. Their programme will focus on audience development and events (as discussed in section above) as well as changing and improving existing exhibitions on a gradual basis. Some capacity exists to put on small new exhibitions such as the recently produced WW1 exhibition to coincide with the commemorations in 2014.

Education consultation

1. The Education Consultant report has been completed with clear recommendations to enhance school/museum science based learning. This has fed into sessions delivered to schools during phase 2. A teacher focus group has been created to feedback as new curriculum subjects are 'bedded-in' to lesson planning. Teachers have input on planned Geohub sessions to ensure that we are offering them something that enhances the classroom based learning.

Other educational

1. Primary school Geopark education sessions have been written and are being marketed to schools and delivered. Information also available on website to download.
2. Revised TQM school visit pricing policy to bring it into line with Torre Abbey. Reviewed against other delivery organisations including TCCT and Kents Cavern.

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3. Set up 'pool' of paid education deliverers to deliver sessions at TQM which is a self-supporting system. The fees charged to the schools covers the cost of buying in the educator with some money remaining to support core costs.
4. At Torre Abbey Leah has been working with Elizabeth Newberry and Ali Marshall on education planning for garden activities. Collaborated with Head Gardener and Consultant, on garden activity back packs – now operational. Working with Head Gardener on Children & Families activities programme e.g. Autumn and Christmas activities. Collaborated with Head Gardener, Consultant and Abbey Ed Officer, on first stage of Primary Education Programme - (3 Abbey-Garden linked sessions).
5. Undertaken consultations with teachers (mainstream and academies, plus South West Science Leaders Network Meeting), on current state of play within education, attitudes/opinions around current and anticipated future changes and likelihood of schools taking up the current sessions.
6. Joint education sessions set up between Kents Cavern and TQM and being delivered effectively.
7. Secondary schools - After consultation it is clear that there is less scope for an extensive Education Programme due to the nature of secondary education. Schools approach is offsite visits in first year of secondary and post GCSE (A'level). In consultation with a secondary geography teacher and Ed Consultant. Leah drafting a full day's activity programme that is most likely to entice this sector out of the school grounds.
8. Shop Window Displays -Despite huge effort this has been impossible, up to date, to deliver due to owners of premises refusing to allow us to use them – despite TQM being a charity. Leah now organising getting the material into the local libraries and the Town Hall. Also following a contact who it is hoped will be able to offer advice about getting into shops.

Accreditation/Forward Plans

1. Torre Abbey - Accreditation Review submission to Arts Council: including application, Forward Plan, Access & Learning Policy, Collections Development Policy, supporting staff to develop Collections Development Framework documents and collate Fire & Security Plans, policy documents, staff development evidence and evidence of good practice. Torre Abbey has successfully been re-accredited.
2. TQM – in process of supporting development of Forward Plan and related documents.
3. Brixham - in process of supporting development of Forward Plan and related documents.

Web-portal

1. In taking the unified web portal forward, the museums identified the opportunity to not only address the unification of the museums for online visitors, but could also re-design the museums' own websites to better engage with broader online audiences. As a result, the remit and value of the web tender was increased (with greater financial contributions made from partner museums). The contract for this was awarded to Website Vision Ltd. on 15/02/13.
2. A Torbay Museums web portal has been up and running since July 2013. It is now the vehicle also being used to access the Torbay Heritage Pass and sign up to the joint e-newsletter.

Basil Greenwood
Future Museums Project Manager
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