



Association of Independent Museums

The National Body Connecting, Supporting and Representing Independent Museums

Association of Independent Museums AIM E-News – August 2014 – Number 60 – **EXTRACTS**

AIM Energy Action Group saves members £114,000 so far!

The AIM Energy Action Group has already saved 36 museums across the UK £114,000 - just by identifying over-payments they have made of Climate Change Levy. Museums that have paid too much can claim back their over-payments for the past three years. In her AIM blog, AIM executive director Tamalie Newbery points out that if this rate of savings was replicated amongst all 1,000 AIM members they could save over £3 million! **As well as helping identify over-payments of Climate Change Levy, the AIM Energy Action Group is helping museums and historic sites identify over-payments of VAT. VAT on fuel should usually be charged at 5% to charities, rather than 20%.** The AIM Energy Action Group is a free, no obligation service that can help most museums and historic sites save money on their gas and electricity bills. Members of the group also have the opportunity to get a free, no obligation quote for energy supplies from the bulk-buying energy basket, typically providing savings of 15% but sometimes much more. Act now, as there are opportunities in August to get great prices on electricity contracts. There is still time to join - contact the AIM Energy Action Group at: info@AIMenergyactiongroup.co.uk, tel: 029 2019 0260. Website: <http://aimenergyactiongroup.co.uk>. Even if you are locked into a contract it is still worth registering with the AIM Energy Action Group. We can ensure you are paying the correct amount for VAT and Climate Change Levy as well as making sure that your contracts are properly terminated within the given window and having a new, no obligation quotation ready for you when the current contract ends. We also provide advice on some of the latest energy saving technologies. The AIM scheme is supported by Arts Council England, Museums Galleries Scotland and the Welsh Government.

Legal guidance on using tick boxes for donations and Gift Aid on admissions

Charity law specialist, Farrer & Co, has produced helpful guidance on recent changes to the law which need to be complied with when using tick boxes to add donations to transactions or when using the 'plus 10%' Gift Aid on admissions scheme. The written guidance follows the briefing the company gave at AIM's National Conference in June about legal implications of the implementation of the Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013. The new regulations need to be borne in mind if your online purchasing systems offer the opportunity to give an extra donation to your charity when making a purchase (for tickets or anything else). The purchaser must consciously opt in to this extra donation. It is not sufficient to give them the opportunity to un-tick a pre-selected donation amount. Care must also be taken with Gift Aid on admissions where the extra 10% method is used. Under this method visitors are asked to make donations of at least 10% extra for the cost of their admission ticket and complete a Gift Aid declaration. If they do this, the whole cost of the admission ticket and the 10% donation can be counted as a donation for Gift Aid. The visitor must be given a clear choice whether to pay the extra 10% for a Gift Aid admission or the normal price. Farrer & Co explain the implications of the new regulations on this type of Gift Aid admission, in this extract from their full guidance note which can be downloaded from the link at the end of this article:

Until now many charities have told donors the 10% is an 'extra' donation over the cost of a normal ticket. The problem is that statements which imply a division between the ticket price and a donation within a single payment risk both (a) falling foul of the Regulations, as they suggest that an "additional charge" is being levied over and above contractual consideration; and (b) characterising the payment as a "split payment" (as per 2 above), of which only the donation element will be eligible for Gift Aid.

As a result, where a charity wishes to use the Gift Aid admissions scheme to claim Gift Aid on the whole amount paid for admission to charity property, it is important to indicate to the customer that the whole amount will be a single payment which can be treated as a donation for Gift Aid purposes. However, provided this is done, and the guidance below is also followed, our view is Regulation 40 should not apply to the transaction, because (a) a different sort of ticket is being sold (one on which Gift Aid can be claimed, in contrast to one on which Gift Aid cannot be claimed) and (b) there is no "payment payable in addition", as a single price is being paid for a single item (the ticket).

AIM strongly recommends members read the full guidance from Farrer & Co at <http://tinyurl.com/mp9nphh>

AIM Visitor Verdict benchmarking scheme - how it can help you

"I wish I'd collected more email addresses" was the overwhelming response from the 14 representatives of museums and heritage sites who attended the first AIM Visitor Verdict benchmarking scheme results workshop, as they discovered the huge range of insights that the scheme can give into every element of the visitor experience. AIM Visitor Verdict is an online visitor research and benchmarking tool, which is free for all AIM members to use. Museums collect email addresses from visitors who are then sent an online survey. The museum can log onto the results website and see their data benchmarked against other similar types of museums as well as trends over time. Visitor Verdict's particular strengths are: the low burden on the participating museum with little time required and no cost, and benchmarking which makes clear the significance of your results. The workshop was organised by BDRC Continental and AIM to help sites in the early stages of using Visitor Verdict understand more about how it can help them, as well as to address any questions on the practical elements of collecting email addresses and using the system. Steve Mills of BDRC shared some of the ways that Visitor Verdict can help museums, focusing on four areas: generating more income, marketing and communications, improving visitors' experience and fundraising, investment and advocacy. Go to <http://tinyurl.com/km3egp6> for more details about how Visitor Verdict helped in these areas. The team at BDRC are happy to answer questions about getting set up with Visitor Verdict or about what results mean. Contact amy.randle@bdrc-continental.com. Please also email Amy if you would be interested in attending a future Visitor Verdict workshop, if you'd like to host one in your area or if you would be interested in joining a webinar. If you haven't signed up for Visitor Verdict yet, you still can – go to www.aimvisitorverdict.com

AIM commissions donations box advice – help please, by 26 August

Development Partners has been commissioned by AIM to produce a guidance sheet on the use of donation boxes. As part of their research, they are gathering information from a broad variety of museums and other cultural organisations. AIM members are urged to spare 10 minutes to complete an e-survey at <https://www.surveymonkey.com/s/donationboxes>. It covers a broad variety of questions, from designs to donation rates, and will be open until 26 August; entries will remain anonymous. The final report will be in a similar format to AIM's Success Guides and will be available on the AIM website.

Latest AIM Success Guide – Successful Risk Management & Insurance

AIM has published its latest Success Guide, covering risk management and insurance. Written by Adam Prideaux of Blackwall Green, specialist art, museums and exhibition insurers, this is an update on an earlier AIM Focus paper. The guide identifies key areas of insurance relevant to museums and explains how insurance dovetails with risk management to protect property, including the collection, as well as protecting staff, volunteers and visitors. The author describes risk management, giving helpful steps in identifying best practice, and listing the main types of risk (fire, water damage, theft etc) and recommended preventative action. He then highlights best practice in approaching how to insure your museum or gallery, covering statutory insurance and essential cover for areas such as buildings and collections, before going on to describe disaster recovery plans. AIM's new Success Guides on a wide range of subjects relating to museum management are free and you can download them as pdfs from AIM's website at http://www.aim-museums.co.uk/content/success_guides/. All freshly written or updated, many have been funded

by ACE (Arts Council England) through AIM's Resilience programme, or CyMAL (Museums Archives and Libraries Wales).

Manifesto calls on the next government not to “wreck our heritage”

The Heritage Alliance (HA) – the country's largest alliance of heritage organisations, of which AIM is a member – has issued its manifesto for 2015. *The Power of Heritage* asserts that the survival of England's heritage, from our rich architectural tradition to our distinctive landscapes, depends on private, independent and public sectors working together, and the right legislative environment to protect “this huge source of national pride which is a powerful engine for economic growth”. Heritage-led tourism currently contributes over £26 billion a year to the economy. The HA appeals for 12 changes that only government can make to encourage better care of our heritage. Top of the list is a reduction to 5% in VAT, which currently subsidises new construction over the repair, maintenance and adaptation of older buildings. And the Alliance calls on all political parties to support the new Historic England, one of the two bodies succeeding English Heritage next year, particularly its capacity building function, enabling others to take on more responsibility for heritage. Other changes include ensuring heritage is at the heart of sustainable development and attracting greater investment. Loyd Grossman, HA Chairman, says: “In the run-up to the General Election, we need to see heritage recognised as the national asset it so clearly is. We want a policy framework that encourages individuals, businesses and local authorities to realise the power of our heritage, not wreck it through ignorance or neglect.” The full manifesto is at www.theheritagealliance.org.uk/manifesto

Giving to Heritage workshops and telephone surgeries – are you taking advantage?

Latest dates for the Heritage Lottery Fund-supported Giving to Heritage programme delivered by The Heritage Alliance have been announced. *Making the Heritage Case to Donors*, one of two core one-day workshops, is available to book in nine heritage venues across the country: Burgh House, London NW3 (9 September), Burgess Foundation Manchester (11 September), Newarkes House Museums, Leicester (15 September), Museum of Bath at Work (16 September), Thackray Museum, Leeds (24 September), a North East location (15 October) and Newport, Isle of Wight (6 November). For those who missed the successful workshop *Developing a Heritage Fundraising Plan*, they will be repeated at Action Stations, HM Naval Base, Portsmouth (18 September), Hughenden Manor, Buckinghamshire (23 September), Blandford Corn Exchange, Dorset (8 October) and Ironbridge Museum, Shropshire (4 November). Workshops on *Community Fundraising*, *Major Donor Fundraising* and *Corporate Partnerships* are also being rolled out. And, if you would like to discuss your current heritage fundraising plan with an expert on a one to one basis, you can do so by booking a one hour slot at one of the *surgery days* (next dates are 7,10,16 October, 19 November and 2,11 December). The £500,000 scheme aims to empower heritage enthusiasts with the skills they need to improve their fundraising capability and diversify their income through training sessions - AIM is represented on the programme steering group. Workshop places cost just £20. Book at www.givingtoheritage.org.uk - and for further information about the programme contact mark.webb@theheritagealliance.org.uk (tel 020 7222 3982). See below for a similar scheme for Scotland.

STICK annual conference

STICK (Scottish Transport & Industrial Collections) Subject Specialist Network is holding its annual conference also on 18 October at the McManus Collections Unit, Dundee on *The Scottish Diaspora: International Mobility of Industry, Technology, Ideas, Products, People*. Costing £12.00, further information is at <http://www.stickssn.org/site/pages/conference.php>

E-FAITH 2015 – promoting industrial heritage Europe-wide

The European campaign to promote industrial heritage throughout 2015 is gathering pace, with a workshop on factory chimneys being held in France at the end of this month. The annual E-FAITH (European Federation of Associations of Industrial & Technical Heritage) industrial heritage weekend will take place in Lyon, France on 24-26 October. Interest in industrial heritage began in

the UK in the 1960s and spread across the continent; there are now 150 members of E-FAITH from 19 European countries. In 2015 the association's main aim is to promote cross-border contacts and co-operation, supporting each other's initiatives and exchanging ideas and expertise. Two priorities are twinning between organisations and the establishment of transnational thematic steering groups, with the possibility of eligibility for European grants: three of these have been set up, on dangerous industrial heritage (covering pollution and health and safety), factory chimneys as landmarks in the landscape, and conservation and new uses for harbour cranes. A fourth soon to be launched focuses on mills. E-FAITH is also interested in hearing of any special activities planned by museums to mark the 2015 promotion. Further information: www.e-faith.org

Developing financial security

Resourcing Scotland's Heritage, run by A&B Scotland, is a similar programme to England's Giving to Heritage programme (see above) aimed at developing organisations' long-term financial security. *Planning to Progress* will be held in North Berwick on 10 September and in Dumfries and Galloway on 17 September, and In Focus: Case for Support will be held in Edinburgh on 25 September. <http://tinyurl.com/mlkqlo4>

Grants for the Welsh Museum Festival

The Federation of Museums & Art Galleries of Wales is making available small grants of £200 to support activities and events during the Welsh Museum Festival (4-12 October). The money could be spent on organising an event, enhancing an existing event, printing promotional materials, promotional freebies, placing adverts, circulating flyers, additional staff time etc. Applications will be considered on a first come first served basis - get your application in as soon as possible or by 19 September. Contact

john@arenig.demon.co.uk or tel 01978 861621. Meanwhile Nicola Williams is collating information on museums' events for the festival to promote on the website – contact Nicola.Williams@Wrexham.gov.uk

The Charity Commission and the Office of the Scottish Charity Regulator have now published the two **new Sorp accounting standards** for charities, highlighted in previous E-News issues and AIM Bulletins. These are for charities using the FRS 102 standard and for smaller charities working with the FRSSSE. They apply to financial years beginning on or after 1 January 2015. <http://tinyurl.com/lxtzrfs>

Northampton Borough Council's two museums (Northampton Museum & Art Gallery and Abington Park Museum) have been removed from Arts Council England's (ACE) Accreditation Scheme for a minimum of five years following the sale of the 4,000-year-old Sekhemka statue from their collection. The Accreditation panel found that the process leading up to the sale of the Egyptian statue (sold at auction for nearly £16 million) was in contravention of the Accreditation Standard. The proceeds of the sale will be divided between the council (£8 million) and Lord Northampton, whose ancestors donated the statue to the museum. The council is considering a legal appeal against the decision.

Trustees Week 2014 is an annual event showcasing the work that trustees do and highlighting opportunities for people of all walks of life to get involved and make a difference. The week is on 10-16 November organised by the Charity Commission in partnership with a number of volunteer organisations. NCVO (National Council for Voluntary Organisations) is currently looking for three-minute videos for their 'One in a million' trustee competition. Their blog, <http://trusteesweek.blogspot.co.uk>, includes useful ideas and information about being a trustee. For 2013 they collected stories from trustees across a huge range of charities. Read them at: <http://tinyurl.com/p94zsd9>

Museums across the UK can access a **useful online toolkit** for making small and medium-sized tourism destinations more **environmentally sustainable**, saving money at the same time. Created by Visit Wales the toolkit is divided into nine sections covering such subjects as reducing utility bills and carbon footprint, reducing and managing waste, sourcing sustainable transport, enhancing local wildlife and green accreditation and award schemes. Most of the resources and advice are not specific to Wales and are relevant to museums and historic sites. <http://tinyurl.com/oq5qvqw>

Grant Schemes Closing Dates

Sustainability Scheme – 1 June and 15 January

Conservation Scheme – 31 March and 30 September

Preventive Conservation Scheme – 31 March and 30 September

AIM Training Grants – for 2014 onwards, 10 March for courses between 1 April-30 June; 10 June for courses 1 July-30 September, 10 September for courses 1 October-31 December and 1 December for courses 1 January-31 March.

National Heritage Landmarks Partnership AIM/Biffa Award Scheme – 29 August

www.aim-museums.co.uk

AIM National Conference 2015

The 2015 conference will be held at the ss Great Britain, Bristol on 18-20 June 2015. www.aim-museums.co.uk