



Association of Independent Museums

Helping Heritage Organisations Prosper

www.aimuseums.co.uk APRIL 2016

4 EXTRACTS

Leadership & Culture

Alex Lindley contributes a second article on human resources issues

How to achieve success in succession planning

The Museum Accreditation Standard of 2011 defines succession planning as "an agreed set of processes to ensure business continuity and accountability through changes in leadership or of key members of the workforce." It's a rather dry description which certainly wouldn't stimulate me to put it high on my list of priorities. However, succession planning is increasingly on our agenda as a sector, as its' position in the AIM Hallmarks programme attests. Not only is it part of good governance (often a key criterion for funding decisions), in financially pressing times it also becomes particularly important to understand how our organisations would be affected by changes in leadership or structure.

My experience of working with clients on succession planning has also brought home just how much it can make the day-to-day running of museums easier. Here are a few familiar scenarios that could be avoided by good succession planning – but often aren't:

- Your highly experienced curator is leaving and all his specialist collection knowledge is going with him, because he's never had time to write it all down
- Your museum works well when everyone is there, but when key people are absent unexpectedly, it becomes much harder because only certain people know how to do certain things
- You've known for ages that your chair is retiring, but have no idea how to start looking for his/her replacement.

For me, succession planning has three key elements:

- Ensuring you have the right people in the right roles to meet your Forward Plan
- Planning for changes in leadership and key roles
- Ensuring that the knowledge and skills of your staff and volunteers is stored and shared, so that when they are absent or leave, the museum doesn't lose their expertise.

So, how do you do it? When I meet clients for the first time, I usually use a range of tools to help us assess where they are at the start of the journey. Two of the most important are a skills audit for key roles and a knowledge audit of where the organisation's knowledge resides (e.g. in people's heads or in shared access documents). There are several skills audit templates available that can be adapted for your particular organisation – the link at the end of this article provides some examples from Essex Museum Development*. Next, we'll compare the Forward Plan with the roles and responsibilities of staff and volunteers, checking whether all areas are adequately resourced. Finally, we'll discuss planning leadership changes – identifying internal candidates for development into leadership roles and working out which roles require external recruitment. Then, we write an action plan for succession. Of course, the actions vary according to the organisation, but common actions include:

- Creating new staff or volunteer roles to cover gaps in the Forward Plan

- Writing role descriptions, person specifications and recruitment strategies to be prepared for when vacancies arise
- Building career planning conversations into 1:1s and appraisals, helping employees with potential to plan training and development to ready them for leadership roles
- Creating a plan for storing and sharing people's skills and knowledge more effectively, whether that be mentoring, How To guides for skilled tasks, or simply getting all the important documents together in one place.

Of course, really good succession planning isn't a one-off. Done well, the processes become embedded in how the organisation works and questions of structure, leadership changes and knowledge management are reviewed and monitored on an ongoing basis. It's rarely a simple process and often throws up unexpected and challenging questions about your Forward Plan and the ways you work, but for me, that reason alone makes it worth doing.

* <http://essexmdo.com/resources/web-based-resources/>

Alex Lindley is a freelance consultant, specialising in Human Resource Management and Volunteer Management for the heritage sector, and a trustee at Scarborough Museums Trust. alex.lindley@email.com, [alex.lindley/aa/aa/91100/](https://www.linkedin.com/pub/alex-lindley/aa/aa/91100/)



Innovation & Risk

Sharing technology on a budget

Sheringham Museum, Norfolk is to share a software programme it has created with other museums to help those with limited incomes find ways of providing interaction between the museum exhibits and visitors.

The museum is using Raspberry Pis, small inexpensive computers, to make its exhibition text panels interactive, allow visitors to see videos and access in-depth information on different topics, power touchscreens, play oral history recordings through a dial phone, and to link collection management systems to public-facing websites, enabling people to browse artefacts online.

The project was supported by the Museums Association's Transformers programme and a presentation was given at Museum Tech 2016: A Digital Festival for Museums in Manchester in January.

At Sheringham the new software will be deployed as part of its £1.2 million Heritage Lottery Fund-supported redevelopment project, opening later this year. The system will be tested from the spring, says manager Philip Miles, after which the museum will release the code and produce a recipe book and free templates detailing step by step instructions on building and maintaining affordable interactives using Raspberry Pi computers and user-generated content.

The museum is keen to hear from other museums who would also like to trial the kit, as well as suggestions for museum related technology that could be created using Raspberry Pi computers and cheap off-the-shelf technology. More details can be found at <http://tinyurl.com/gtglujo>, or contact Philip at enquiries@sheringhammuseum.co.uk

Independents demonstrate greatest strength

Independent museums are showing the strongest increase in self-generated income, with an increase of 3%, in contrast to local authority museums with reductions of 2%, according to the Museum Association's latest cuts survey. But the trend for shorter hours, branch closures and moves towards charging at local authority-run museums is growing. 115 museums took part in the survey published at the end of last year, reflecting the UK sector as a whole. Key findings include: 18% said that part of their museum had closed or would do shortly; 8% had introduced charging and 12% will do shortly; 11% said they were considering financially motivated disposal; 61% reported an increase in visitor numbers, and 45% said they had increased the number of unpaid staff compared to 32% the previous year. Fundraising and income generation are a top priority for the coming year with 79% and 77% respectively aiming to increase the amount of work in these areas. More than 60% said encouraging participation by involving people in the work of the museum was a priority.

Some local authority museums are expecting further major budget cuts (52% in one case), and others the loss of major assets, such as museum buildings, which may involve rationalising collections significantly. Some are finding resilience through commercial schemes and community partnerships, a given for independently-funded museums.

In Brief

Good practice with charity reserves
The Charity Commission has issued guidance on charity reserves and the importance of a policy to explain them. *Charity reserves: building resilience (CC19)* shows how funds kept by a charity in reserve can strengthen its resilience against, for example, drops in income or the demands of a new project. But charities should have a policy explaining their approach to reserves. The guidance explains how to develop a reserves policy, the legal requirements for publishing the policy and reporting on it, and what trustees should do to keep proper oversight of their charity's reserves. Find out more at <http://tinyurl.com/fjuc2u9>