

RENAISSANCE museums for changing lives



AIM FOCUS PAPERS



USING MUSEUM CONSULTANTS

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Introduction

The aim of this FOCUS paper is to help museums and galleries – and those thinking of developing museums – to get the best results from the use of consultants.

Why use a consultant?

There are all sorts of reasons why museums, or those considering developing a museum, use consultants. Some motives includes:

- To obtain a fresh, independent view.
- Because the museum lacks – perhaps temporarily – the skills and experience it needs.
- Because the museum's governing body, or its manager, wants to make major changes, and wants independent support in doing so.
- Because a stakeholder (eg a possible donor) wants an objective assessment before giving or continuing support.
- Because the museum manager knows the Board will accept an outsider's opinion more readily than his or her own.
- Because an organisation is considering moving into the museum sector and needs constructive, objective, advice.

There are also good reasons for *not* using a consultant. Among them are:

- The expense.
- A consultant's advice can be very easily ignored and forgotten. Once they have received their fee, they are no longer around to argue for their point of view.
- Consultants are not always independent and objective. They have their own prejudices, and can even succumb to the temptation to say whatever they think their paymasters want them to say.

Who are the consultants?

A kaleidoscope of different professionals is eager to sell advice to museums: lawyers,

accountants, architects, designers, engineers, trainers, information managers, tourism consultants, arts consultants, surveyors and so on. Even within the specific museum and gallery field there is big variety, including specialists in museum management, education, preventive conservation, documentation, marketing and interpretation.

Those who call themselves 'museum and heritage consultants' fall into four principal groups:

- Independent consultants (sole traders or 'singletons') with museum backgrounds.
- Small firms, often with a design, tourism, leisure or arts background.
- Larger companies, particularly ones specialising in leisure attractions.
- Moonlighting employed museum workers.

Inevitably every museum consultant has particular specialisms and strengths; some concentrate on feasibility studies for new visitor attractions, some on museum management issues, some emphasise their experience in collections management, some in public programming and so on.

Museum consultancy is still a very small field; the independents with a background in museum work probably only number a couple of dozen people. Rivalry remains friendly and people are very committed to the museum profession; there is a shared 'museum' ethos and ethic.

Independent consultants often work together on individual jobs, and there are some more-or-less formal and long-term partnerships.

Preparing for the consultancy

The more thought the museum puts into preparing for the consultancy, the more useful it is likely to be.

The main issues that need to be considered are:

- Do we really need a consultancy? Do we know why we want one?
- What outcome are we looking for?
- Is the budget in place?
- What is the timetable?
- Are all those who will need to be involved committed and available?
- Who will manage the consultancy?
- Who will take the project forward after the consultant has finished?

How to find a consultant

The only really fair way to find a consultant is to advertise publicly; indeed, many museums may feel that their Equal Opportunities Policy requires it. The Museums Association's publishes an annual *Directory of Suppliers and Consultants*, with an on-line version, and advice may be available from the regional Museums, Libraries & Archives Council. In practice, though, personal recommendation is still a very common way to find consultants.

Recruiting your consultant

The first rule must be: treat the recruitment of a consultant just as seriously – if not necessarily as formally – as for a staff appointment.

For larger jobs (perhaps where fees are over £20,000) the following steps are recommended:

1. Advertise for 'expressions of interest'.
2. Review those 'expressions of interest', and perhaps encourage 'shotgun marriages'.
3. Invite those on the resulting 'long list' to make a Proposal.
4. Draw up a 'short list' and invite those on it to interview.

For smaller jobs:

1. Advertise for Proposals.
2. Draw up a 'short list' and invite those on it to interview.

It is, though, important to remember that preparing a Proposal can take a consultant a considerable time. If the requirements of the tendering process seem too onerous, good consultants may not feel it is worth submitting.

Setting a timetable

Unrealistic timetables are one of the most common problems. It is vital that a sensible start date be set, to allow time to appoint the consultant *you want*. A good independent consultant will probably be booked up for two or three months ahead, though he or she *may* be able to squeeze in a few days at short notice. Large firms have more flexibility than independents, and may be able to respond more quickly.

Ensure that the deadline gives enough time for *both* parties. Allow time to manage the consultancy; are the staff, volunteers and trustees involved going to be available? You will usually be expected to supply the consultant with information, eg recent annual reports and accounts or policy documents: allow time to collect and supply these papers and remember that any delay will cause slippage in the timetable.

It is equally important to ensure that the finishing date is carefully considered. It must give enough time for the job not to be skimped, and must also ensure that a decision on the consultants' recommendations follows quickly. Can you arrange a Trustees' meeting to receive the Report? How does the proposed timetable fit into your financial cycle?

Consider carefully, at this beginning stage, how you will take the project forward *after* the consultant has reported. Draft an outline Action Plan that leads on from the consultant's report.

How to write a good brief

Your Brief to the consultant will very largely determine whether you got the job done that you want. A good Brief should include:

1. Background
 - An outline of the background of the project or problem on which the consultant is being asked to advise.
 - The mission of the museum, and some indication of its character and culture.
 - A sketch of the visitors, staff, buildings and collections.
 - Copies of the museum's Forward Plan, constitution, and most recent accounts and balance sheet.
2. The purpose of the consultancy: what, as exactly as possible, is the consultant

being asked to do? What is the hoped-for outcome of the project?

3. What skills and experience is the museum looking for in the consultant?
4. Required options:
 - What the Report should include, eg assessment of feasibility, assessment of capital and revenue costs, action plan etc.
 - How many copies are required. (Don't forget other stakeholders, eg any grant-giving body).
 - Other outputs, eg Presentation to Board, public meetings etc.
5. Proposed timetable:
 - Proposed start date.
 - Anticipated number of 'progress' meetings.
 - Proposed completion date; how crucial is that deadline?
 - Roughly how much time do *you* expect the consultant to spend on the job? (Remember that the consultant may disagree; may feel it needs more time or less.)
6. Method of work:
 - How much input will the museum's staff have?
 - What resources will the museum provide to support the consultant?
 - Indicate roughly how many interviews and meetings etc the consultant is expected to arrange. Are focus groups or public meetings expected?
 - Are specialist studies like market surveys, visitor surveys, collections surveys or building surveys expected? (If they are already available, send them with the Brief).
7. Confidentiality and copyright.
 - If you want to hold copyright in the Report you must negotiate it with the consultant; otherwise it belongs to the author. Some consultants are reluctant to assign copyright in order to avoid the risk of their report being 'quarried' and used outside the context of their work, thereby apparently lending their reputation to a view they might not support.
 - Is the project more than ordinarily confidential, or on the contrary is publicity actively sought?
8. Fee. What is the available budget? Does this cover expenses and VAT?
9. Appointment process:
 - To whom should Proposals be returned?
 - By when?
 - Appointment process and timetable.

10. The tender. What you feel it should include, eg:

- Details of relevant experience.
 - Details and experience of consultant(s); who will do what.
 - Outline of research strategy, working methods and timetable.
 - Referees.
 - Proposed fee, what it includes and how it is arrived at.
11. Contacts:
 - Whom can consultants phone to discuss the project and seek more information?
 - Who will be managing the project and working with the consultant? (It is especially important that this be clear if more than one body is involved in the project).

How to choose your consultant

There will be three main ways in which you judge between the consultants seeking your job:

1. The consultant's Proposal, including their experience etc.
2. Any enquiries you can make from people who know them or their work.
3. The interview.

Just as for a staff appointment, it is helpful to draw up a 'person specification' for the consultant(s). What skills, experience or character are you looking for? You will then be able to use a careful analysis of their Proposal, private enquiries and the interview to find the individual or firm which most closely meets your specification.

Among the things you will be looking for are:

- Whether the consultant – whether an individual or a firm – has relevant experiences.
- Whether they have a good track record.
- Evidence that they understand your Brief.
- Who the lead consultant for this job will be, and who is actually going to do the bulk of the fieldwork.
- Will they need any sub-contractors or associates, or back-up help of any kind. Who will they use? What resources have they got?
- An indication of empathy with the basic aims and culture of your museum.
- An ability to contribute fresh ideas.
- Value for money.
- A convincing Proposal.
- Vitally important: whether you like and can happily work with the team with whom you are going to work.

Be prepared for potential consultants to query or challenge aspects of your Brief. Remember that it is precisely because you want a differ-

ent view from your own that you are hiring them.

When comparing tenders, make sure that you are comparing like with like. For example, one consultant may claim to be a marketing specialist on the grounds of once having been on a two-day course, while another may have years of direct experience. One may think that your Brief implies a need for a thorough investigation of all possible sites, while another may feel that an analysis of space requirements is the main need at this stage. The Brief *should* have made clear which you are expecting, but the consultant may disagree.

You need to be very sure of the criteria on which you will make your choice: experience, empathy, imagination, reputation, price etc. Is a blue-chip company needed, or would you get better value from an independent?

While a consultancy job should be publicly advertised as the first step, it is perfectly acceptable to suggest to potential consultants that they combine to create a stronger team ('shotgun marriage') or add skills which you feel they may lack.

Interviewing the consultants will be much like interviewing for a member of staff: the same advice applies. There are however three major differences:

1. Because this is a comparatively short-term commitment, you can afford to take risks; to appoint, perhaps, the consultant with the imaginative ideas rather than the one with the solid track record.
2. You need to discover whether your consultant can think imaginatively about your problem or project, *without* exploiting their ideas. Architects and designers call 'free-pitching' the practice whereby a client invites a consultant to come up with ideas for a project, and then uses those ideas without payment. This is *not* acceptable.
3. Unlike candidates for a job, consultants' costs will vary. It may therefore be wise to consider the consultants' qualities first, and compare their proposed costs second.

What sort of contract?

Formal contracts are still fairly uncommon in museum consultancy, though larger firms often have a standard contract. Unless your governing body's rules requires one, a formal contract is probably unnecessary for smaller jobs; an exchange of letters, based on your Brief and the consultant's Proposal, should be adequate. Ensure that these cover:

- Fee and payment stages; VAT; expenses.
- Timetable.
- What deliverables?

How much will it cost?

Consultants' fees range from £200 to over £1000 per day. If that seems expensive, consider that the lower end of that range is probably much less than a museum professional costs their museum!

Independent consultants will normally expect to be paid a half or a third of the fee on appointment, a third halfway through a larger job, and the remainder on completion.

Getting going

Once the consultant is appointed, the next step will be an initial meeting. At this meeting you will be able to:

- Get to know one another.
- Define the issues more clearly.
- Refine the Brief and the Timetable.
- Provide essential documentation and background reading.
- Provide a list of essential/desirable people and places for the consultant to see.

Working with the consultant

Devote time to working with your consultant. It helps relations if you can afford a modest amount of time to be hospitable, particularly if the consultant is away from home.

What facilities will you supply? Will the consultant need an office, or at least a desk and telephone? Secretarial help? Can you undertake to arrange the consultant's appointments? Ideally these aspects should be mentioned in your Brief, since they may help to keep the price down.

Ensure that all the museum staff and volunteers are fully au fait with the project. The consultant should be encouraged to talk privately to *all* relevant people, including that junior staff member with the unrealistic views, and that awkward volunteer! Ensure, too, that they are available within the timescale set for the consultancy.

Allow for flexibility; you may find that the emphasis envisaged in your Brief changes radically. For example, the consultant may suggest adding a new dimension to your project, or may discover that your problem lies somewhere else entirely.

Ensure that stage payments are made on time.

The Report and presentation

What is the consultant being asked to deliver? Normally the principal outcome of a consultancy is a Report, but who is it intended for, and who will read it? The approach and style are likely to be different if the principal readers are museum professionals or people from a quite different field.

Will there be an Interim Report? Will there be a Draft Report? Who should see it? Is an Executive Summary of the Final Report needed for wider distribution?

Is the consultant being asked to give a Presentation of his or her conclusions? Who to? Is this Presentation required as well as the Report, or instead?

In case things go wrong

Very occasionally things do go wrong between museum clients and consultants. Usually they can be quickly sorted out by informal discussion, but it is wise to include in the contract the name of an agreed arbitrator in case of real dispute.

The end of the affair

Now the consultancy is finished, what did you think of it? What did your Trustees and other stakeholders think of it? What did the consultant think of it? It will be to everyone's advantage to carry out an evaluation, and for both parties to let the other know what they feel went right and what could be done better another time.

Is there to be any follow-up involving the consultants? Clients sometimes try (often without thinking about it) to get the consultants to do one or two extra little pieces of free work after the agreed end of the job. Equally, consultants sometimes slip into their Report recommendations for further paid work which they might undertake!

Ensure that the consultant delivers on time, and having delivered, is paid promptly.

One of the dangers of using consultants is that skills which once were shared among museum professionals become trade secrets. If the consultant's Report is – by agreement – circulated among interested professionals, everyone gains and everyone benefits. Believe it or not, consultants get very involved in and committed to the jobs they undertake. It is a professional courtesy to keep them in touch by the occasional phone call and postcard as the project develops, and finally to invite them to the opening!

Maintaining the momentum

What matters most to *you* is what happens after the consultancy. How are you going to take the project forward? It is all too easy, especially during a long consultancy, to lose sight of the fundamental purpose of every consultancy, to guide *action*.

You should, at the very beginning, have outlined a Timetable and draft Action Plan, and the consultant should have refined that Action Plan to correspond with his or her recommendations. Now is the time to review it again, ensuring that the key permissions are obtained, the key meetings are fixed, and that the key people will be available to take the project forward.

Timetable for a consultancy

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|---|---|
| 1. Decision to commission consultants. | |
| 2. Draw up Action Plan, Brief and Timetable. | |
| 3. Advertise for 'Expressions of Interest'. | Allow at least three weeks for replies. |
| 4. Draw up Long List and invite them to submit Proposal, sending them your Brief. | Allow at least four weeks for replies, preferably six. |
| 5. Draw up a Short List and invite them to interview. | |
| 6. Interviews and decision to appoint. | A decision should be made immediately following the interviews. |
| 7. Initial meeting. | May be quite soon after the appointment is made. |
| 8. Consultant starts work. | May have to be some considerable time after appointment. |
| 9. Progress meetings, if required. | |
| 10. Interim Report, if required. | |
| 11. Draft Report. | |
| 12. Final Report. | |
| 13. Presentation, if required. | |
| 14. Consultancy concluded: payment and evaluation. | |
| 15. Action Plan revised: implementation begins. | |

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