

NATIONAL SERVICES --- TE PAERANGI

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Planning a new museum

How good is your idea?

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Planning a new museum – *How good is your idea?*

You have a great idea for a museum and you're keen to start one. But how do you put that idea to the test? This guide aims to help you decide whether you can turn your dream into a sustainable and financially secure reality.

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Introduction

This guide offers you a framework for ensuring that what you are planning is a viable project and sustainable in the long term.

Museums, art galleries, iwi cultural centres or whare taonga, historic places, science centres, interpretive centres, exhibition centres ... People continue to be inspired by the idea of setting up a place whose appeal and value will have visitors pouring through the doors.

In this guide, the term 'museum' is used as shorthand for all these types of organisations. They carry out various functions such as care of collections, public programmes (including exhibitions), education, and community relationships. There is no doubt about the benefits – cultural, communal, and economic – that they can bring to communities.

However, museums need to be well run to bring about these benefits. This includes being well funded, well governed, well connected to their community, with well-managed buildings, facilities, services, and collections.

With some basic planning, you can go a long way toward deciding whether opening a new museum is the best way to realise your concept. You can also find out if you're really committed to the project. Furthermore, if you need funding to start your museum, funders or investors are much more likely to assist if they see that you've thought through the basics.

As you work through the process, keep an open mind and note that:

- your idea might need to be teased out a bit further
- the scale of your project might not be at the right level
- there are other options than building a museum available to you.

The guide is set out in four main sections. Three of them pose various questions to help you focus your plan and test your assumptions on key areas – your purpose, your organisation, and your financing. 'Take a step back – looking at alternatives' challenges you to consider alternative ways of fulfilling your vision. Case studies at various points illustrate how other organisations have approached similar tasks or issues.

Defining your purpose

This section sets out three key questions you need to consider when thinking about starting a new museum. What do you have? What is this for? Who is this for?

What do you have?

Focus on what you have at the core of your plan. Is it, for example, a collection, a body of genealogical information, a historic building, archives, or oral records?

What is the significance of what you have? What makes it special? To whom? What is its relevance to your community?

What is this for?

A key part of your project concept is its purpose. What do you hope to do with what you have? Why? Whether you have a building to preserve, a digital resource to create, or a collection to provide a home for, your project's ultimate shape is going to depend on why you are doing it. You must have a clear vision of purpose before embarking on the project.

Your purpose will also contain the answer to the question 'what are the benefits?' Your project's purpose and benefits provide a framework for all major decisions down the track. You also need to be able to express them clearly to any potential sponsors or funders.

What is the purpose?

Is the aim of your museum to, for example:

- exhibit
- interpret
- enable research
- borrow and lend
- create a community focus
- create employment?

What is the benefit?

Will your purpose contribute to the creation of a positive community environment, for example? How?

What is the cultural or historical value of the project?

Testing your purpose

Do your objectives duplicate or overlap with other museums or culture and heritage organisations already in existence? If so, have you discussed your project with these organisations? Remember that you will be competing with them for the same limited funds.

Have you researched the cultural and historical benefits of your project? Have you made contact and discussed your ideas with other appropriate organisations and groups in the field, for example:

- Museums Aotearoa
- your local council
- other museums in your region
- other groups in New Zealand with similar interests
- National Services Te Paerangi?

Who is this for?

This question focuses on your target audience – who will make use of what you have to offer? Within the community? From surrounding communities and beyond?

Your fit within the community

Will what you are planning meet a need in your community? What evidence do you have for that?

'The immediate community is the most easily reached. Most small museums find that they are dependent mainly on this immediate community for support, even if the majority of their visitors come from other communities. It is therefore important that a museum have a clear, structured concept of the immediate community, both for its future planning and its present support.'

(Source: *Planning Our Museums*, p 14)

Have you carried out any consultation with the local community, including local iwi? Getting this support early in the planning process is essential.

If you do not have a source of funding already in place for ongoing costs, it is important that you secure the support of your community and have services you can offer to them. This should be a part of your museum's vision statement.

Identifying community need

Look up your local council's Long-Term Council Community Plan (LTCCP). Has the community already identified a demand for the type of services and facilities that you want to offer? If so, you have an opportunity to align your project with this goal.

You may employ independent professionals to undertake a study or you can also do your own community consultation and research.

- Analyse existing information, e.g., research such as census records or reports on projects in the area by voluntary, non-government organisations, and government agencies.
- Devise a questionnaire and conduct a survey.
- Undertake participant observation.
- Organise interviews and discussions.
- Arrange focus groups.

For more information about these consultation and research approaches, refer to Creative New Zealand's guide *The Toolkit: a planning tool for community consultation and quality decision making in local authorities* (August 2001). Available for download from www.creativenz.govt.nz.

An added benefit of doing community consultation early is that you are already marketing and stimulating interest for your proposed museum.

Identifying visitor numbers

Have you researched potential visitor numbers, from within your community and outside it? Is your estimate of them realistic? You'll need evidence to convince a funder or sponsor that your museum will attract visitors.

Ways to gather this evidence include:

- stage a temporary exhibition for participant observation (see next column)
- access information on tourism trends for your region from the Ministry of Tourism Research website (www.tourismresearch.govt.nz), Tourism New Zealand (www.tourismnewzealand.com) or your Regional Tourism Organisation (RTO)
- obtain visitor numbers from a similar organisation in your community
- talk to other museums in towns of similar size to your own.

Surveying your community

Start off with your family and friends: ask them what they think of your proposed idea. If you receive a positive response, test your idea further by surveying the wider community.

Formalise your questions to determine the level of public interest. Finding out the level of interest will help you shape your plan. Before you begin, discuss the survey with your local council to ensure that they are aware of your plans. They might even be able to offer you some form of support.

Sample questionnaire

(**Note:** this is a suggested framework only. Modify the questions to suit your proposed museum and its objectives. Test your questionnaire for comprehension before you proceed.)

- 1 Do you think the historical items/heritage within your community are being cared for adequately? Give examples.
- 2 At present, do you feel that you have the amount of access you want to your historical items/heritage? Why is that?
- 3 Would you support the development of a museum in your community? (If yes, go to Q4. If no, go to Q5.)

4 If yes:

- (a) Do you agree that some of the initial funding should be sourced from your local council?
- (b) Do you think it is reasonable to pay through your rates/rent towards the ongoing costs of running a museum?

5 If no:

- (a) What is the main reason you do not support the development of a museum in your community?
- (b) What do you think is the best way for your community to care for and access its historical items/heritage?

Observing participant interest

Stage a temporary exhibition of your concept where you can observe visitor behaviour. The response to it will indicate whether there is public interest in your proposed museum and who will form your target audience. Some possible locations include:

- empty shops or window exhibitions in public spaces
- libraries, community or club halls
- other museums in your community.

Convincing the funders

Here are two examples of the requirements funders expect applicants to fulfil.

Dunedin City Council – Arts Discretionary Fund	Lottery Environment and Heritage
<p>Up to six grants of \$5,000 are allocated annually to established, legally constituted, non-profit groups whose primary activity involves the development of arts or culture within Dunedin City.</p> <p>Groups or organisations applying must:</p> <ul style="list-style-type: none"> • have local profile and demonstrate significant interaction within the wider community • demonstrate self sufficiency, good management, long term planning and accountability processes • only apply for one project or programme per year. <p>Applicants must:</p> <ul style="list-style-type: none"> • demonstrate clear benefits to the community • promote and advance arts and cultural development • be new initiatives, not part of usual activities or programmes • support and encourage significant local involvement or content • promote Dunedin as an arts and cultural centre • increase awareness, opportunity and participation in arts or cultural activity • demonstrate good planning, management and accountability processes. 	<p>The Lottery Environment and Heritage Committee makes grants to not-for profit organisations to foster the conservation, preservation and promotion of New Zealand’s natural, physical and cultural heritage.</p> <p>For capital works on cultural heritage projects, your application must include:</p> <ul style="list-style-type: none"> • a feasibility study • a statement outlining the significance of the collection housed in the museum or art gallery • a written reference from an independent museum or gallery professional endorsing the project • an explanation of how public access to the collection will be provided or improved • a full set of building plans and specifications noting any resource consents required • a quantity surveyor’s estimate for the proposed work • a business plan for your organisation. <p>Priority is given to projects which:</p> <ul style="list-style-type: none"> • protect collections at risk • make collections more available to the community • enhance the learning experience and involvement of young people • conserve moveable cultural property.
(Source: Dunedin City Council)	(Source: Department of Internal Affairs)

Outcome

Addressing the key questions in this section should enable you to draw up a statement of purpose for your museum that:

- describes the big idea – **what you have** and **what you want to do** with it
- sets out the big aim – **what your museum is for**
- identifies, with evidence, **the need it will fulfil** in your community
- identifies your **target audience**
- estimates, with justification, your **visitor numbers**.



A school group watching a sheep being sheared at the Shear Discovery Centre. Photograph courtesy of Shear History Trust

Case Study 1: A project that flew – Shear Discovery Centre

The Shear Discovery Centre in Masterton, managed by the Shear History Trust, traces the history and development of sheep farming in New Zealand, with the main emphasis on wool. The Centre has three-dimensional displays of shearing-shed plant and activities, along with wall and video displays.

Staff: 1 part-time; about 65 volunteers.

Capital/start-up costs: about \$600,000, sourced mainly through local trusts, who contributed to a major portion of the costs, and Lottery Environment and Heritage Committee.

Annual operating budget: about \$66,000, sourced mainly through ‘peppercorn’ rental from Masterton District Council for the property, door fees, school tours, grants, and sponsors.

Key learnings from building and running a museum

Access to expert support and advice is crucial. Most trust members possess expertise in administration and governance, and are ex-presidents of Golden Shears so they have expert knowledge about sheep and wool history.

None in the trust had previous museum experience, so they looked for outside expert support and advice during the planning process. In particular, they commissioned a feasibility study which pointed them in the right direction. They were also supported by volunteers who had experience in museum management and archives.

Completing the New Zealand Museums Standards Scheme gave the trust credibility in the eyes of funders and the museum sector. It proved that they were willing to do the groundwork to ensure the long-term success of the Centre.

The trust is aware that the support of their local council and their community can help sustain the Centre far into the future. Both their business plan and feasibility study were backed up by planning documents commissioned by the Masterton District Council. The in-depth planning by the trust and the support of their local council contributed to their successful application for funding from the Lottery Environment and Heritage Committee.

In addition, the museum builds goodwill with its community by allowing other clubs, for a small donation, to make use of its premises.

A clear vision helps to ensure that all involved in the Centre know what their focus is. Their vision states that they are to cover a broad spectrum of sheep and wool history, so when they gather oral history they interview people from across the industry, ranging from past champions of Golden Shears to cooks who fed shearers. To date, they have interviewed 60 people and this is an ongoing project for the Centre.

Doing in-depth research and planning is important. For example, the Centre recognises that effective marketing and promotion to city visitors are crucial as they have a rural subject focus.

Advice for those planning a new museum

‘I cannot stress the importance of the volunteer base enough. The real success of the Shear Discovery Centre is our volunteers and without them all the money raised would have been worthless,’ says Laurie Keats, Chairman of the Shear History Trust.



Proposed Mackenzie Heritage Centre. Image courtesy of Interpretation New Zealand

Case Study 2: Only wind in the tussocks – The Mackenzie Heritage Centre

The proposed Mackenzie Heritage Centre started as one individual’s dream to establish and operate a visitor experience to share the many and remarkable stories of the Mackenzie region. The project took place between 2002 and 2006. The proposed opening date was 2007.

The project was planned on the basis that minimal objects would be used in the Centre's development. Rather than being a place of things (i.e., collection items), this would be a place of stories built around a few key items.

Capital/start-up costs: about \$14 million, to be sourced mainly through central and local government, philanthropists, sponsorship through one key corporate, donations from key individuals in the wider local community.

Proposed annual operating budget: about \$1.1 million after year 5, with an income of \$2.1 million sourced mainly through admission charges (estimated \$18 per adult entry and 75,000–150,000 visitors per annum).

Advice for those planning a new museum

This project did not proceed. Malcolm Anderson, now director of Interpretation New Zealand, took over the management of the project for a charitable trust in its second year of planning. He noted that the key learnings about planning a new museum for those involved included:

- employ full-time independent professional advice early on
- develop the conceptual stories as the key to a successful visitor experience prior to design of the building
- develop a comprehensive brief for the architect based on the above
- never let architects design their own brief
- secure a core major funder before proceeding beyond high level concepts
- communicate with tourism industry early on
- develop professional approach (brand etc) in all communications
- network with potential funders and supporters as much as possible
- check and recheck all assumptions, reports, plans etc
- beware the politics of corporate and both Local and Central Government agencies.



Henry Barton's historic register of intending immigrants for the Albertland scheme being handed over by Mrs Carol Scott and Mr Paul Barton, descendants of Henry Barton, to Peter Marsh of the Albertland and Districts Museum. Photograph courtesy of Albertland and Districts Museum

Case Study 3: A community resource – Albertland and Districts Museum

The Albertland and Districts Museum started off as a private collection of the Brookes family. The museum's collections and archives are unique in New Zealand, and indeed the world, as they relate to a specific migration from England to that locality in the early 1860s. They are also in possession of W H Marsh's collection of some 6000 glass plate negatives (currently being scanned digitally) which gives a photographic record of life in the district from 1900 through to 1946.

Staff: about 25 volunteers.

Annual operating budget: about \$25,000, sourced mainly through publishing and selling historical books about the Albertland District, selling prints from their extensive photographic collection, admission fees, grants and bequests.

Key learnings from running a museum

Given the strength and uniqueness of their collections and archives, the museum forms an important part of the community and continually receives requests from researchers and others who are interested in the history of the district.

The museum has a band of dedicated volunteers who have given their time freely.

Completing the New Zealand Museums Standards Scheme was particularly useful in identifying weaknesses and providing some guidance on ways forward. This has led the organisation to complete a feasibility study, which is giving them a good platform to base future plans on.

Advice for those planning a new museum

'Research the project well and take loads of advice from museum professionals,' says Peter Marsh, Deputy Chair of Albertland and Districts Museum.



The NewDowse. Photograph by Simon Devitt

Case Study 4: Defining a museum's purpose – TheNewDowse

In early 2006, Lower Hutt's Dowse Art Museum went through a rebranding process as part of refocusing the vision and values of their organisation. From this process emerged TheNewDowse as an institution with an increasingly national role based on a strong sense of community involvement and ownership. Tim Walker has been director there since 1998 and spearheaded the rebranding process.

NSTP: What urged you to rebrand The Dowse?

TW: We see the process of understanding the brand as a key to success. And it's not just about a logo – that's a small element of it. It's about thinking hard about what we are, who we are for, and what we could be and who we could be for. So we took the opportunity, as we developed the brief for the new building and while we were closed, to think hard about what the organisation could become as we moved ahead into the 21st century. While maintaining a focus on decorative arts, our programmes had already moved to encompass a wider understanding of the value of creativity – including hip-hop, creative entrepreneurship, and mental health projects.

NSTP: What were the key learnings for you during this process?

TW: It's a great way of building a team and a collective understanding of, and buy-in to, the organisation's business. Working with a very experienced team at designworks enterprise IG helped us to develop a consensus understanding of what had made The Dowse such a great organisation in the past, and to clearly express where we are headed. It helped us further develop the values that underpin everything we do.

NSTP: What do you think is your museum's point of difference?

TW: The by-line to our new brand, 'creativity in progress', is about innovations in creativity that drive human progress and understanding – culturally, socially, spiritually, and economically. This opens us up to thinking about projects in a distinctly different way from other museums and galleries and allows us freedom to engage a wide range of audiences that a more traditional 'media' (i.e., craft, photography, etc) or 'type' (i.e., contemporary art gallery, design museum, etc) wouldn't. Obviously, to be of value, any organisation's point of difference needs to be clear and advantageous in business terms.

NSTP: What do you think is the most important factor for a museum's success?

TW: To add value – to individuals, the community, and society. I think museums are fundamentally about value and the underlying values of contributors, audiences, stakeholders, and partners. If you can work in a way that facilitates the expression of this to reinforce existing value and build new value then you'll be successful. Museums need to be constantly thinking about the values of those they seek to work with and for, which are constantly changing. Because we are often about 'conserving' things, we can sometimes become unduly orthodox and formulaic about how we see our role, and this can lead to our potential value being undermined.

NSTP: Finally, what sort of advice would you give to someone planning a new museum?

TW: Be really clear about what you want to achieve, who for, and the underlying value of that mission. Ask yourself 'who cares?' and 'what would make them care more?' Be realistic about ongoing funding and business issues and do everything you can to build a relevant and sustainable organisation.

Take a step back – looking at alternatives

Have you looked at alternatives to starting a new museum? You should strongly consider collaborating with an existing organisation rather than starting an organisation that might end up competing for the same funds.

This is an important step as these alternatives can provide more flexibility in the resources you allocate to achieve your project. The start-up costs are likely to be lower and results come more quickly compared, say, to constructing a building, which may be years in the making, as well as requiring a long-term investment.

Here is a selection of alternatives to consider:

- partnership with other local organisations such as museums, halls, libraries, churches, or businesses
- trade shows, conferences, temporary exhibitions
- a project, e.g., restoration project; publication of a book
- a touring exhibition in libraries and schools
- working with your local council to lease space etc
- a mix of services, e.g., a combination of visits, workshops, resource packs, collection boxes for loan
- a virtual museum via a website.

The following case studies illustrate four of these alternative approaches.



Kete Horowhenua. Image courtesy of Horowhenua Library Trust

Case study 5: The digital museum

Kete Horowhenua – the stories of the district as told by its people

Launched on 5 March 2007, Kete Horowhenua is a community-built digital library of arts, cultural, and heritage resources for and about the Horowhenua district. The Horowhenua Library Trust, partnered with the Horowhenua District Council and Levin SeniorNet, undertook the creation of the site and is responsible for its ongoing development. The organisers were worried that Horowhenua, as a district without a public general museum, was losing treasures and archival resources as older citizens downsized their homes or died.

Kete Horowhenua aims to give the community an opportunity to capture the memories and stories that are

its heritage, a place where artists and ordinary citizens can showcase their work and celebrate who they are through photographs, video and audio footage, and stories. It's also an opportunity to get privately owned papers and photographs out from under beds and have them sit alongside public archive and photographic collections.

The National Digital Strategy: Community Partnership Fund provided the bulk of the development funding, supplemented by Horowhenua Library Trust, Horowhenua District Growers Association, and Horowhenua District Council. Ross McColl Cars provided transport whenever needed, and Horowhenua College made their computer suite available for training volunteers. It is expected that to manage the website will take the equivalent of one part-time position, for a total of about \$25,000 per year.

There have been many positive outcomes from this project. Dozens of individuals in the community have given thousands of hours of voluntary labour in preparing digital content, proving that people are passionate about their own stories.

'TradeMe' was the inspiration for creating an easy and intuitive interface. 'If it's easy, anyone can contribute, and they will' was the organisers' mantra. The digital domain has captured the imagination of the younger generation worldwide, and this website can be used as a vehicle for encouraging this generation to be more interested in their culture and heritage.

However, the digital approach need not be an impediment to the older generation – the ones with many stories to tell. By working together with Levin SeniorNet, Kete Horowhenua was able to compose clear instructions for all to follow. As one excited user said, 'I did it ... entered SeniorNet as a topic. It was easy and the on-screen instructions were clear ... I did ... I found it ...What a buzz!'

For the organisers, probably the most positive outcome is that a digital museum has a very low financial commitment compared with a physical museum!

An invitation

The Kete software is available for download and other communities are invited to build their own Kete. For technical help, contact Walter (walter@katipo.co.nz) or go to <http://blog.kete.net.nz>. For more information about Kete Horowhenua, go to <http://horowhenua.kete.net.nz> or contact Rosalie Blake, Head of Libraries (kete@library.org.nz).



Volunteers sorting out images to use in the *Treasure Hunters* exhibition. Photograph courtesy of Motueka District Museum

Case study 6: Working with your local museum 1

Treasure Hunters exhibition

Motueka District Museum's exhibition *Treasure Hunters – a look at local collections and treasures* featured unique, unusual, and historical treasures from private collectors in the community. When the request was advertised in local papers *The Guardian* and the *Motueka Golden Bay News*, the museum received more than 21 responses to display private collections. This exhibition reaffirmed to the community that this museum is their museum and strengthened the positive relationship that the museum has already cultivated with their community.

The exhibition brought the community to the heart of the museum and showed how excited the community was to be involved in the museum. The private collectors began to understand and appreciate the hard work that goes behind putting up exhibitions, as they were given a chance to help with the display of their collections.

The collectors were engaged in the process as the ones with the knowledge and stories pertaining to their own collection. The role of museum staff therefore changed from experts to facilitators who ensured the integrity of the information being collated.

A clear process that listed all collection items, with photographs attached, and signed contracts ensured that both parties were clear about exactly what items were being loaned to the museum and about their mutual obligations.

'This exhibition created an ideal opportunity for the museum and its community to work together. It is only when a museum tells unique stories of its community, stories that can't be told anywhere else in the world, that it brings the museum alive and makes it a far more interesting place to visit for both locals and international tourists,' says Pauline Westall, Manager of Motueka District Museum.

Case study 7: Working with other organisations

Displays in Wellington City Libraries

Wellington City Libraries encourages local cultural and artistic groups to mount promotional displays in the central and branch libraries within established guidelines. Examples include tramping clubs, country and ethnic groups, health groups, the International Festival of the Arts, and the Wellington Film Festival.

Each library attempts to provide a broad spectrum of displays each year, and to present a balanced view of each subject covered. Displays are booked for a period of two weeks. The onus is on the group concerned to approach the library, and once the booking is accepted a representative of the group must sign an 'application for display space' form which sets out the terms of engagement.

By working with these groups, Wellington City Libraries seeks to promote good relations with community groups in accordance with the aims of Wellington City Council, to provide a showcase for the many sporting, cultural, and ethnic groups within Wellington, and also to illustrate the material which the libraries hold relevant to that subject.

An exhibition mounted on the first floor of Wellington Central Library to mark the fiftieth anniversary of the 1956 Hungarian Revolution, 9-24 October 2006. Photograph courtesy of Wellington City Libraries





Visitors at the Burt Munro and the World's Fastest Indian exhibition. Photograph courtesy of Southland Museum and Art Gallery

Case study 8: Working with your local museum 2

Burt Munro and the World's Fastest Indian exhibition

A new museum was originally planned to celebrate the achievements of New Zealand's Burt Munro. However, after research was undertaken and feedback from key stakeholders sought, the museum was deemed not feasible due to limited resources.

An alternative option was launched – to stage an exhibition at the Southland Museum and Art Gallery in Invercargill. The exhibition was a partnership between the museum and the Invercargill City Council, which owns the Burt Munro collection. This gave the city immediate access to the collection, instead of waiting for a new museum to be built.

Taking this less ambitious approach at the start has had several benefits. It has allowed the Council to gauge the interest of the community before allocating more resources to the collection, and the proceeds from the small cover charge on the exhibition have been directed towards funding a museum development.

'Through careful negotiation, the parties involved were able to come to a mutually beneficial decision which has helped ensure that the Burt Munro collection is publicly accessible and cared for appropriately, and which has helped ensure that any future planning for the collection is robust,' says Gael Ramsay, Manager of Southland Museum and Art Gallery.

Key questions on running your organisation

This section poses questions on how you plan to achieve your vision. How will you run your museum? What do you need to consider?

What sort of organisation?

What will be its legal structure?

If your museum wants to obtain funding, it will need to have a legally recognised structure or work in close partnership with an umbrella organisation that already has one.

There are various options available and you should seek legal advice before deciding on the appropriate structure for your museum. The two most common are incorporated societies and charitable trusts.

For more technical or legal information, refer to:

- Keeping It Legal E Ai Ki Te Ture (www.keepingitlegal.net.nz)
- Companies Office website (www.societies.govt.nz)
- CommunityNet Aotearoa's 'how to' guides and templates, which include a flowchart showing the process for setting up an incorporated society (www.community.net.nz).

How will your organisation be governed?

'Good governance creates a strong future for an organisation by continuously steering it towards a vision and making sure that day-to-day management is always aligned with the organisation's goals.'

(Source: www.community.net.nz)

Your museum will need a governing body, usually a trust, which will operate according to the rules of the constitution. Are you aware of all the responsibilities attached to being a trustee?

For more information, refer to Creative New Zealand's guide *Getting on Board* (August 2003), available for download from www.creativenz.govt.nz.

Have you identified your stakeholders?

A stakeholder, as defined by R E Freeman (1984), is any group or individual who can affect or is affected by the achievement of the organisation's purpose and objective.

Stakeholders include potential funders, local authorities, iwi, schools, and other individuals who share your passion. It is crucial that you have strategies to build effective and long-term relationships with them.

Effective governing bodies

Here is CommunityNet Aotearoa's list of what to look for in effectively functioning governing bodies:

- a good skill mix
- an effective chairperson
- committees for specialist tasks
- well-managed meetings
- dynamics that allow free expression of different perspectives – an effective chairperson, backed by a strong vision for the organisation and clear protocols, can make sure all perspectives are taken into account
- outside specialist help on some issues – this is necessary if you cannot use the organisation's staff (which should be your first port of call) e.g. in the case of highly sensitive matters
- good self-evaluation.

Can you comply with the legal requirements?

In the box is a summary of some of the legislation that applies to operating and managing a museum in the public domain. Are you able and prepared to do everything needed to fulfil these requirements?

The long arm of the law

Accident Insurance Act 1998

The accident compensation scheme provides 24-hour no-fault, comprehensive and compulsory accident insurance for anyone who is injured in an accident in New Zealand – whether a citizen, resident, or temporary visitor. Employers have particular responsibilities with regard to workplace accidents. Premiums are paid by employers and self-employed people to cover work-related injuries.

Building Act 2004

Provides for the control of building work and the use of buildings and ensuring buildings are safe and sanitary. A museum considering the construction, alteration or demolition of a building requires a consent under the Act. All building works are also to comply with building standards prepared under the Act.

Conservation Act 1987 / Conservation Amendment Act 1996

Promotes conservation of New Zealand's natural and historic resources and provides for the establishment of the Department of Conservation to manage public conservation lands. A museum requiring access to conservation areas needs to comply with the requirements of the Act, including applying for a concession to operate on or over land managed by the Department.

Copyright Act 1994

Under the Copyright Act 1994, copyright comes into existence automatically when any original literary, dramatic, musical or artistic work, sound recording, film, broadcast, cable programme and published edition is put into material form, e.g., manuscript, audio/video recording. Copyright is administered by copyright owners themselves or by collecting societies which provide centralised copyright licensing services to copyright users.

Health Act 1956

Relates to public health in matters or activities which are likely to be injurious to health under this Act. Museums must comply with requirements for matters such as the cleanliness of an office, and the avoidance of crowding in a building.

Historic Places Act 1993

Promotes the identification, protection, preservation and conservation of historic and cultural heritage sites. Check with the New Zealand Historic Places Trust to verify if your property and surrounding area include historic or cultural sites of national importance. You also need to check with your regional and district councils for sites of regional and local significance. If a site is protected, activities on or adjacent to the site are likely to be restricted.

Local Government Act 2002

Provides for the functioning of local government, including bylaws to regulate public health and well being, roads, land and buildings, recreation and community development and coastal activities. If you seek to undertake activities such as erecting signs, a local bylaw will be needed. Check with your city or district council for applicable bylaws.

Occupiers Liability Act 1962

Relates to the liability of occupiers and others for injury or damage resulting to persons or goods lawfully on any land or other property. The liability is for damage or injury from dangers due to the state of the property or to things done or omitted to be done there. A museum providing facilities for visitors is liable for the safety of those visitors arising from the state of those facilities.

Protected Objects Act 1975

The Protected Objects Act 1975 regulates the export of protected New Zealand objects; the illegal export and import of protected New Zealand and foreign objects; and the sale, trade and ownership of taonga tūturu. Taonga tūturu is one of nine categories of protected New Zealand objects defined in the Act.

Resource Management Act 1991

Promotes the sustainable management of natural and physical resources. A museum considering undertaking activities such as extending a building must comply with the objectives, policies and rules in the regional and district plans which seek to manage the natural and physical resources of the area.

Employment Law

Here is a selection of the legislation that is currently relevant to any employer or those who recruit volunteers.

Criminal Records (Clean Slate) Act 2004

Covers employees, volunteers, contractors, job applicants. Under this Act, an individual who has a minor conviction and has not reoffended for 7 years, does not have to declare this information in most circumstances.

Employment Relations Act 2000

This Act requires employees and employers to deal with each other in good faith and not to do anything that would, or would be likely to, mislead or deceive each other, whether directly or indirectly.

Health and Safety in Employment Amendment Act 2002

Covers employees and volunteers who work on an ongoing and regular basis as an integral part of the business. The main aim of this Act is to 'provide for the preventions of harm to employees at work'.

Minimum Wage Act 1983

Covers employees and trainees (in part). This Act sets minimum wages for employees, the rate depending on the employee's age. The youth minimum wage also applies to trainees enrolled in industry training programmes.

Privacy Act 1993

This Act contains rules for the collection, storage, disclosure and use of personal information about employees, volunteers and contractors.

What sort of expertise?

How will you get access to the kind of human resources you need to run your organisation? Will you employ them? How much will you depend on volunteers?

Can you afford to be an employer?

Have you considered the costs and responsibilities involved in being an employer? As well as salaries, they include:

- insurance (that covers public liability)
- legal costs
- redundancy
- leave entitlement
- staff training and development.

The Department of Labour has a website (www.ers.govt.nz) which contains basic information on laws relating to the workplace. It outlines the main rights and obligations of employers and employees, and contains many templates and checklists. For instance, it includes examples of covering letters to help employers meet the requirements of the Employment Relations Act 2000 when offering employment.

Can you attract and retain volunteers?

Will you be able to attract voluntary support to continue the operation of the museum across the full range of its activities for five or ten years into the future?

Note that volunteers still require as much support as your employees; for example, the Health and Safety in Employment Amendment Act 2002 applies to volunteers as well as paid staff.

For more information, refer to *He Rauemi Resource Guide 29: 'Working with Volunteers'*.

How about your collection?

How will you maintain and develop your collection?

Do you have the resources to care for, catalogue, and interpret your museum collection? At the most basic level, you will need an employee or a volunteer who has had training to perform these tasks. Contact National Services Te Paerangi to find out more.

Has your organisation defined what the future collecting policy should be? How do you intend to develop your collection? Will you have a fund for purchasing new acquisitions?

How much storage will be needed for your collection five or ten years from now? You should anticipate that your storage needs will increase so planning ahead is essential.

Who owns your collection?

Do you know who will own your collection? Will the collection belong to your organisation in perpetuity? Have you made these arrangements? Succession planning is crucial to ensure that your collection will not be sold off once the original members are no longer involved in your organisation.

For more information, refer to the Collection Care issues of *He Rauemi Resource Guides*.

What sort of facilities?

What will you need space for in your museum? Have you considered the amount you'll require, for example, for storage and administration, for interpreting and displaying the collection, educational activities, and visitor facilities?

Are you planning to occupy a building?

Have you weighed up the advantages and the disadvantages of getting involved with a building?

Advantages

'Being based within a building has the obvious advantage of bringing all your activities under one roof and providing a visible, physical attraction. It offers you the opportunity to create an ambience and a public image. Your project could save a building otherwise under threat and you could combine with other partners to offer other facilities needed locally.'

Disadvantages

'Bills have to be paid: heating, lighting and insurance at the very least. Maintenance costs have to be met – these can be high in older buildings. The building needs to suit your purpose, should be easily accessible, and should have the potential to be developed as your organisation grows. Older buildings do not often meet these requirements and, if they are registered as an historic place [with the New Zealand Historic Places Trust], making necessary changes may be prohibited. Finding the funding to create a new building, which would meet your needs, is very difficult.'

(Source: *Big Questions? Big Answers*, p 28)

Do you have an existing building in mind?

Suitability

Does the building contain suitable storage and display areas with conditions which will not be detrimental to the collection?

Buildings for museums have specific and unique needs. Many existing buildings are not suitable to house museum collections without substantial renovation or development.

Rates commitment

Do you know what the forward plan for rates is and have you factored this information into your budget? If not, contact your local council.

Upkeep

Have you considered the annual costs required to maintain and secure your building? Contact other museums with similar-sized buildings to get an estimate.

Resource consent

Have you checked if you need resource consents to set up your museum? If you do, are you aware of the process and the related costs to secure them?

Any environmental effects of establishing a museum are dealt with under the Resource Management Act 1991 (RMA). District Plans and Regional Plans contain rules about activities, and may trigger the need for resource consent. Find out about resource consents and, if you need one, how to ensure the resource consent application process flows as smoothly as possible.

Resource consents and museums

To establish a museum, it is possible you will need land use consent from your district (or city) council. It is not likely that regional council resource consent will be required – although it would pay to check.

The first step should always be to contact the council and discuss your proposal. Remember to check with two councils – both the district (or city) council, and the regional council.

Developing a relationship with the council/s so they understand the proposal helps when you are looking for a location for the museum, and, if you need resource consent, during the application process.

For more information about the RMA, visit the Ministry for the Environment website (www.rma.govt.nz) which has the publications below available.

- Thinking of Starting a Business?
- An Everyday Guide to the RMA Series (boxed set of booklets and a CD-ROM, available free)

Historic building

Will your museum be housed in a building that is registered with the New Zealand Historic Places Trust (NZHPT)?

If you intend to use a historic building, refer to NZHPT's *Heritage Management Guidelines for Resource Management Practitioners*, which briefly describes the roles and responsibilities of organisations involved in the management of historic heritage. Issues covered include:

- earthquake strengthening
- conservation planning
- resource consent applications.

These guidelines can be used as a checklist when processing resource consents that have effects on historic heritage, including those that may affect archaeological sites. Visit the Trust's website (www.historic.org.nz) to download a copy of the guide.

(Source: NZHPT)

Feasibility studies

Whether you plan to make significant changes to an existing building or construct a new building for your museum, you should carry out a feasibility study to evaluate the likely success of your project.

A feasibility study critically examines a project's viability and assesses whether it is likely to fulfil your organisation's objectives.

The use of feasibility studies in New Zealand museums developed from the funding requirements of the Lottery Environment and Heritage Committee. To receive a building grant from the Committee, museum projects must meet certain requirements.

For more information, refer to *He Rauemi Resource Guide 30: 'Feasibility Studies'*.

What about visitor experience and customer service?

Visitor experience

What sort of experience will you offer your visitors? Will you have permanent displays, changing exhibitions, and education and events programmes?

If exhibitions are part of your project plans, have you thought about how you are going to go about developing and installing them?

Most objects cannot speak for themselves and need to be interpreted. What is it that makes an object special? Why does it deserve to be highlighted? Every community has its own unique history and heritage. The key is to use your collection objects to tell the stories of your community.

How do you create a unique experience for your audience? Imagine that you've got only ten minutes to wow them – what would you do?

In order to get repeat visitors, you've got to continuously reinvent your exhibitions. Do you have plans in place for that?

For more information, refer to the Exhibitions and other Public Services issues of *He Rauemi Resource Guides*.

Customer service

Excellence in customer service is at the heart of success for any museum.

Customer service begins long before your visitor arrives

at the front desk. How easy will it be for visitors to find you? You should ensure that the local information centre have clear up-to-date information about your museum.

Research shows that there are five main areas that customers care about in the service you offer them.

- **Reliability.** Deliver your promised service dependably and accurately.
- **Tangibles.** Have clean facilities, warm buildings, and friendly staff.
- **Assurance.** Know where things are and what's on in the museum.
- **Empathy.** Listen to your customers and pay attention to what they say. Provide personalised care.
- **Responsiveness.** Provide prompt service and a willingness to help.

For more information, refer to the Customer Service issues of *He Rauemi Resource Guides*.

Outcome

Addressing the key questions in this section should enable you to draw up an operational description for your museum that:

- identifies what sort of **organisational structure** you will have
- sets out your requirements for **human resources** to run it
- says what your **collection policy** will be
- specifies the **facilities** you need for its operation
- identifies your **requirements for space** and how you will look to meet them.

Case study 9: An enterprising organisation – The Kauri Museum

The Kauri Museum at Matakoho in Northland presents a fascinating picture of New Zealand's pioneering days through the story of kauri timber and kauri gum.

Staff: 30 full- and part-time; about 100 volunteers.

Annual operating budget: about \$1.5–2 million, sourced through admission fees and shop sales.

Key learnings in running a medium-sized museum

A band of voluntary enthusiasts started the museum and to this day the board of trustees, voted for by the local community, do not receive any remuneration and are dedicated to being voluntary.

However, the trust treats the museum as a business. Operating as such is one mechanism to sustain the museum long into the future.

The Chief Executive Officer of the museum is aware that he must have an understanding of museum issues. However, it is also crucial for him to have the right skills to deal with management issues such as human resources and marketing.

Completing the New Zealand Museums Standards Scheme gave the museum direction as to what training should be provided for staff members.

The museum has a strategic plan and uses it to guide its direction, current and future.

The museum acts as a cultural focal point where the community can come together, thereby becoming an integral part of the community.

The museum achieves high visitation from international tourists, which forms a major source of income.

The museum has good standards of documentation, e.g., loan agreements and policies, which ensures its smooth running.

Advice for those planning a new museum

'Have a properly delivered plan, and undertake in-depth research for possible funding avenues. People are always very passionate about their ideas but their enthusiasm should be well balanced by business acumen in order to sustain their museums long into the future,' says Albert Lovell, Chief Executive Officer of The Kauri Museum.

Case study 10: Getting a new building 1 – Geraldine Vintage Car and Machinery Museum

The museum has recently expanded to a new building and went through a well thought-out project plan. The Geraldine Vintage Car and Machinery Club, which runs the museum, formed a building committee which managed the development of the new building.

Staff: 80 volunteers.

Annual operating budget: about \$21,200, sourced mainly through admission fees, members' subscription fees, donations.

Capital needed for new building: about \$250,000, sourced mainly through the local licensing trust, Lottery Environment and Heritage Committee, Mid-South Canterbury Trust, Southern Trust, and income from door sales.

Key learnings in managing a capital project

A sound business plan and feasibility study are essential as these planning documents will determine the long-term sustainability of the building. They will also have a major impact on the outcomes of your funding applications.

Support of volunteers who have experience in local body regulations, e.g., resource consents and building permits, is invaluable.

Be flexible during the planning stage.

Advice for those planning a new museum

'The museum has to have the right mix of people with a diverse set of skills and expertise, that is, management skills as well as subject expertise on local history, etc,' says Jennifer Wilson, Treasurer of the Geraldine Vintage Car and Machinery Club.



The new building of the Geraldine Vintage Car & Machinery Museum. Photograph courtesy of Geraldine Vintage Car & Machinery Club

Case Study 11: Getting a new building 2 – The Kauri Museum

The Kauri Museum at Matakōhe in Northland presents a fascinating picture of New Zealand's pioneering days through the story of kauri timber and kauri gum. The new Otamatea Boarding House is a two-storeyed life-sized replica based on the old boarding houses of the Kaipara District (about 1910). The idea was put forward nearly 10 years ago, but it only took flight in 2004 when the museum included it as a priority in their strategic plan.

Otamatea Boarding House project costs: about \$550,000 sourced mainly through Lottery Environment and Heritage Committee, ASB Trust, Tourism Facilities Development Grant.

Key learnings from the Boarding House project

The planning covered all bases, firstly through local community agreement, then with the relevant external authorities such as the Department of Conservation and the Kaipara District Council for use of domain land on which the museum is situated, enabling consents and permits to proceed without delay.

The trust sought expert advice for building specifications and design.

Community support proved invaluable as many collection items were donated by the community, some of whom were descendants of families from the kauri era.

Volunteer support reduced costs for the museum, as minor restoration work was done by knowledgeable volunteers. This was balanced with work completed by professional conservators.



The Otamatea Boarding House. Photograph courtesy of The Kauri Museum

Key questions about money

How will you raise money and how will you manage receiving or spending it? Doing financial management well is essential to any museum's survival.

Your planning needs to cover the three major elements:

- how to generate funds and spend them – budgeting
- keeping accurate and accessible records – accounting
- reports – being accountable.

How will you raise money?

Can your organisation generate enough money to establish your museum and then run it from year to year and into the future?

Unless you have a private sponsor or donor, you will need to raise funds from a variety of sources to get your museum up and running. Many funders, both public and private, are quite specific about the types of grants they will make. The main distinctions are between capital and operational, and core and project costs. In New Zealand, public funding opportunities are predominantly for capital costs. Sustainability (that is, day-to-day expenses) is normally the responsibility of the museum's management and board.

Capital or operational funding

Grants schemes may say that funding is available for either capital or operational costs.

Capital costs are one-off costs: buildings, equipment, vehicles – spending on items that become capital assets of your organisation.

Operational costs are your ongoing running costs – items of expenditure such as heating, lighting, rent, wages, transport, insurance, and so on. This type of funding is extremely difficult to find and maintain.

Core or project costs

Another important distinction funders will make is between core costs and project costs. Many funders will only fund projects and are reluctant to fund core costs, the central costs of running your organisation.

Within your revenue budget you may be able to define certain areas of project work and systematically assign percentages of core costs to each project using a cost-centre approach.

You should be aware that many funding schemes have guidelines about which contributions to core costs may

be included in a project funding application, and you should check before preparing costings.

Funding options

Donations

Donations can come in different forms including cash donations, donations of income (e.g., from interest or rent), and donations in kind (e.g., provision of free services or donated goods).

A financial endowment is a transfer of money or property donated to an institution, with the stipulation that it be invested and the principal remain intact. This allows for the donation to have a much greater impact than if it were spent all at once.

Membership

Your organisation may offer membership as a means to raise money. Having 'friends' of an organisation is a common approach. They are usually people interested in but not directly involved with the organisation (though they may be a good source of voluntary help).

Identify what you can offer to your 'friends' (e.g., open days, newsletters, cheaper entrance fees, preferential booking) in return for their paying a subscription or a donation (you can suggest the amount) to the organisation. Friends can also play an important lobbying role for your organisation.

Self-generated funds

This kind of revenue comes from your organisation's activities and programmes, both regular and occasional, for example:

- regular admission charges
- admission charges for temporary exhibitions or specific events
- shop sales or merchandise.

Business sponsorships

Sponsorship is a two-way agreement in which a company will offer cash, product or service for an association with your organisation or a particular activity.

Local fundraising activities

These include the sales of merchandise (which can also promote your organisation) such as t-shirts,

bumper stickers, fridge magnets, ballpoint pens, as well as sausage sizzles, raffles, quiz nights, auctions of donated services... the range of activities through which vast numbers of organisations raise and maintain their profiles in a community.

Grants

Applying for, providing, and accounting for grants is a mini-industry in itself. There is a huge range of providers of these types of funds, both private and public, all with their own criteria for qualification.

Here is a shortlist of public funders in New Zealand particularly relevant to the museum (arts, cultural, and heritage) sector:

- New Zealand Lottery Grants Board (which includes the Lottery Environment and Heritage Committee)
- Creative New Zealand
- National Services Te Paerangi

The Cultural Funding Guide has a comprehensive list of funding for arts, cultural, and heritage projects. Visit www.nzlive.com for a list of funders that you can apply to.

The Department of Internal Affairs has information on applying for lottery grants or community grants schemes. See www.dia.govt.nz or phone 0800 824 824.

In most places, your local council will have information on funders in the area and what grants they have available (e.g., the Auckland City Council has a Quick Reference Guide available online from www.aucklandcity.govt.nz/grantsandfunding).

For practical help on the application process, refer to *He Rauemi Resource Guide 2: 'Tapping into Funding Sources'*.

What is your budget?

Have you prepared a budget for the capital and running costs of the museum? Have you tested your costs against other museums or related organisations of similar size? Is the budget realistic?

Capital budget

Your capital budget should include not only construction costs (building materials, etc) and professional fees (engineers and architects, etc), but also any extra costs you may incur, such as:

- providing a work area for conservation
- meeting fire regulation and safety requirements
- meeting legal requirements to assist access to public places for people with disabilities
- employing a project manager.

Operational budget

This table offers a checklist of the kinds of income and expenditure a typical museum operation will have.

Operating budget checklist

Operating expenditure	Operating income
<i>Museum management</i>	Door admission fees
Staff costs	Grants
Board member fees/expenses	Charged-for exhibition fees
Specialist services (auditors, etc)	Annual fund
Travel	Bequests
Administration of volunteer programme	Endowment
Building maintenance	Donations
Rent/lease	Travelling exhibits
Energy costs (water, electricity, etc)	Events and programs
Insurance	Services (research fees, etc)
Cleaning	Sponsorship
Security	Membership
Telephone and internet access	Museum shop
Postage/stationery	Catering
Office equipment	Facilities rental
Depreciation	Investments
Visitor and market research	
<i>Collection management</i>	
Staff costs	
Travel	
Conservation – materials and equipment	
Documentation – materials and equipment	
Storage – materials and equipment	
Acquisitions funds	
Collections security	
<i>Museum services</i>	
Staff costs	
Travel	
Exhibitions	
Merchandise/shop stock	
Catering	
Publications	
Marketing	
Events and programmes	
Education materials	

Below is an example of an operating budget for a small museum that employs one part-time staff member and has 16,000 visitors a year.

Operating expenditure		Operating income	
Administration costs			
Audit/accountancy	\$2000	Visitor entry charges	\$40,000
Bank fees	\$300	Gift shop sales (net)	\$1200
Insurance	\$4000	Grants and donations	\$24,000
Office expenses	\$1800	Interest	\$240
Electricity	\$5000	Friends of the trust	\$600
Meetings	\$300	Rent – office	\$1800
Postage	\$480		
Rent ('peppercorn' rental from local council*)	\$120		
Secretarial/staff	\$12,000		
Co-ordinators honorarium	\$12,000		
Stationery/photocopying	\$1200		
Telephone	\$1200		
Repairs and maintenance			
Building	\$1800		
Plant and equipment	\$1200		
Operating costs			
Advertising and promotion	\$5000		
Temporary exhibitions	\$12,000		
Equipment hire	\$360		
Storage	\$2000		
Transport and freight	\$600		
General expenses			
General expenses	\$1800		
Subscriptions	\$240		
	\$65,400		\$67,840

* A common practice in New Zealand where local councils, as owners, rent out buildings or land at minimal cost when they are used for community benefit.

Outcome

Addressing the key questions in this section should enable you to draw up a financial description for your museum that:

- sets out the approximate **capital cost** of your project
- identifies which organisations you can approach for funding
- sets out your **budgetary plan** to generate income to cover the ongoing operational cost.

Conclusion

Thorough research leads to robust planning, which in turn leads to informed decisions. Taking this approach to your project will help ensure the long-term sustainability of your museum.

At the end of this process of planning your new museum, you will know:

- what you want to do
- who you want to do it for and why
- how and what you need to achieve it
- your legal structure and obligations
- your expertise requirements
- your building requirements
- your budget.

If you are unclear about any of these items, it is an indication that you need to do more planning. Contact National Services Te Paerangi at any point during this process for help or guidance.

If you have all of the above information, you are now ready to move forward to the next step, which is to develop a strategic plan. The strategic plan helps you to clarify your ideas about the nature of your museum and its working or operating context. A lot of the research you've done here will feed into your plan. See *He Rauemi Resource Guide 14: 'Developing a Strategic Plan'*.

Well done! You are on the way to building a successful museum that will be sustainable well into the future!

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Websites

Business Information Zone – <http://www.biz.org.nz>

CommunityNet Aotearoa – <http://www.community.net.nz>

Companies Office – <http://www.societies.govt.nz>

Creative New Zealand – <http://www.creativenz.govt.nz>

Cultural Funding Guide – <http://www.nzlive.com>

Department of Internal Affairs (various community funding schemes) – <http://www.dia.govt.nz>

Department of Labour – <http://www.ers.govt.nz>

Keeping it Legal E Ai Ki Te Ture – <http://www.keepingitlegal.net.nz>

Kete Horowhenua – <http://horowhenua.kete.net.nz>

New Zealand Historic Places Trust – <http://www.historic.org.nz>

Ministry for the Environment (Resource Management Act) – <http://www.rma.govt.nz>

Ministry of Tourism (research) – <http://www.tourismresearch.govt.nz>

Museums Aotearoa – <http://www.museums-aotearoa.org.nz>

Tourism New Zealand – <http://www.tourismnewzealand.com>

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