



Baseline information – underpinning success

The following questions were developed at the start of a project where a cohort of museums worked on board development, with the aim of making their boards more ready to engage with the private sector. Those museums from the cohort which had weaknesses in some areas found themselves needing to address these before being able to make credible approaches to the private sector.

A lack of confidence in any area may indicate a need to do further work; overconfidence sometimes hides a lack of understanding.

These questions could be used by any museum as a “health check” prior to engaging with external, commercial partners. The positive answers to each question could also become a narrative for museums to use when approaching the private sector for the first time.

1. Good governance

- a) How many trustees do you have and how long have they been in post?
- b) Do you have a constitution (be able to provide a copy electronically); what does it say about rotation of Trustees?
- c) What methods does your organisation use to recruit new trustees?
- d) What kind of succession plan do you have in place for trustees?
- e) Have you undertaken a skills audit of trustees in the last 2 years?
- f) Where is your annual report published?
- g) How often does your board meet, both formally and outside board meetings?
- h) On a scale of 1-5 (where 1 is ‘not at all confident’ and 5 is ‘very confident’), how confident do you feel in the governance of your organisation?

2. CEO/Chair relationship

- a) Is this relationship robust, i.e. can you disagree without falling out?
- b) Is it an equal relationship with two way dialogue on the full range of issues?
- c) How frequently do you talk, and meet?
- d) On a scale of 1-5, (where 1 is ‘not at all confident’ and 5 is ‘very confident’), how confident do you feel about this relationship?

3. Internal Management

- a) Do you have annual performance reviews for staff/workforce (including non-Trustee volunteers)?
- b) Do you have a forward plan/business plan/strategy? What period does it cover?
- c) Does it itemise external funding requirements?
- d) On a scale of 1-5 (where 1 is 'not at all confident' and 5 is 'very confident'), how confident are you about internal management of your organisation?

4. Mind set of the organisation

- a) What do you currently measure in terms of finance? Do your figures support the overall story you want to tell?
- b) How are the numbers presented in order to support your story?
- c) Do you have a reserves policy? If not, how do you explain any reserves your organisation may have?
- d) What evidence do you gather of non-financial outcomes (this might include visitor numbers, Generic Learning or Social Outcomes, visitor dwell time in your museum, number of volunteer hours contributed)?
- e) On a scale of 1-5 (where 1 is 'not at all confident' and 5 is 'very confident'), how confident are you that everyone in your organisation understands the need to be able to present a coherent story for the future, backed up by evidence?

5. Different methods for increasing external private sector funding and support

- a) Are you clear about which methods of support you want to pursue (corporate support, sponsorship, a private sector individual joining your board, payroll giving, setting up endowments with business support etc.)?
- b) Are they a good match for your stated fundraising needs?
- c) On a scale of 1-5 (where 1 is 'not at all confident' and 5 is 'very confident'), how confident are you that you will succeed in increasing private sector support?