

Sources and further information

■ *Information sheet on Choosing and Using a Museum Education Consultant or Freelance Educator*, Group for Education in Museums and Tel: GEM Freelance Network on 01626 333144, www.gem.org.uk

■ *Focus paper on Using Museum Consultants* by Crispin Paine, Association of Independent Museums www.museums.org.uk/aim

■ *Working with Designers*, articles in Museums Journal April 1990 by David Martin
Tel: Museums Journal on 020 7426 6920

■ *Guide to Choosing and Using Professional Management Consultants Effectively*, Institute of Management Consultants
Tel: IMC on 020 7566 5220, www.imc.co.uk/consultants/choosing-using.php
IMC is the professional body for management consultants. It has a professional register and all members must adhere to code of professional conduct

■ *Guidelines on Conservation*, available free of charge from UKIC
Tel: 020 7721 8246 or www.conservationregister.com

■ Arts Council England Information Sheet, Research
Tel: 020 7333 0100
www.artscouncil.org.uk

WORKING WITH CONSULTANTS

Buying in temporary expertise is a growing practice in the museum sector with most museums unable to afford specialists on a permanent basis. Museums' increasing reliance on project funding and the sheer complexity of bidding for, planning and executing major projects has also led to a sharp rise in the demand for consultants of all kinds, and there is an abundant supply of professionals with skills and experience to sell. With so much now at stake, museums may need to think more carefully about how they recruit and manage consultants.

A Museums Association survey in the 1990s showed that nearly one fifth of respondents relied purely on verbal estimates and agreements when employing consultants; many were uncertain what insurance cover was needed; and 61 per cent of consultants questioned had never been asked for a reference.

This briefing presents practical advice drawn from sources both inside and outside the museum sector. Some of it is common sense; some of it may be impossible for museums trying to achieve great ambitions on shoe-string resources; some of it may not be necessary for small projects. However, it should provide a baseline for ensuring that consultants' work is of lasting value to museums, their audiences and their collections.

What is a consultant?

Someone who sells their expertise and advice to a client according to an agreed contract and for a set fee. In the museum sector where many consultants are self-employed, there is a fine line between this form of expertise and that of a freelance - a self-employed professional who carries out skilled work for an organisation on a temporary and/or part-time basis. Their main difference is that freelancers usually do the work rather than advise on it, and are paid according to the time they put in. This briefing concentrates on consultants, but some of the points will apply to freelancers too.

Do you need a consultant?

- Do you need access to specialist or technical expertise and experience not available on a day-to-day basis?
- Do you lack the staff resources to carry out an important project?
- Do you require research on a specific area, or recommendations on how to achieve specific objectives?
- Do you need an objective input and/or fresh ideas in deciding how to make changes to or develop museum services?
- Do you need an independent assessment and/or an authoritative opinion to attract support or approval from a governing body or influential party?

- Do you need to stimulate new ways of thinking or working among staff or volunteers?

If the answer to one or more of these questions is yes, you may benefit from employing a consultant. However, briefing, selecting and managing a consultant requires a great deal of human resources. It is important to define the project and set clear objectives and also ensure that the consultant understands and works within the museum's culture and standards. Other points to consider include:

- do staff and/or volunteers have the time to support the consultant?

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- do you have the resources to continue the consultant's work after they leave?
- who could manage and monitor the programme?
- the possible limitations of using temporary in place of permanent expertise
- how will the consultant's presence and findings affect staff?
- will they be truly objective?
- will they have sufficient knowledge of the politics and relationships that determine success?
- will they take their knowledge or skills with them when the museum needs them in the long-term?

The museum's ethical principles should be respected by consultants. The MA advises that museums commissioning work should draw the consultant's attention to this and ensure that they can demonstrate explicitly that they adhere to the MA's ethical codes and guidelines and agree to work within them. This should be covered in the contract.

To ensure a successful achievement of your aims you need:

- access to information about consultants
- an effective selection process
- expert advice on the specialist area, if it is outside the museum's field
- a well-written brief
- a contract covering all aspects of the project
- an understanding of what the museum itself must contribute
- an evaluation process that will pick up problems quickly and allow you to learn from them

(Source: Hasted)

Recruiting a consultant

Most museums find their consultants through word of mouth. However, a more formal approach is likely to achieve better results. Some experts recommend inviting proposals from and, if possible, interviewing three consultants.

Defining and planning the project

This should be done in consultation with key staff. It will later form the basis of the brief. You should set out:

- the background to the project
- your aims and objectives. How will the museum benefit from the work, both immediately and in the long term?
- the job the consultant is required to do. What tangibles do you expect them to deliver?
- the timescale
- the budget
- the role of museum staff or volunteers. How much of their time will be made available? How?
- the lines of communication between the museum and the consultant
- the person who will monitor the consultant's progress
- the consultant's access to museum facilities, space, equipment, administrative support
- whether the consultant will need to coach staff or

volunteers in aspects of the work

- how the consultant's work will be taken forward. Do you require an action plan?
- if you require a presentation at the end of the project
- ethical requirements.

Finding suitable candidates

Sources of information include lists such as those held by the Group for Education in Museums, the Regional Agencies, mda, the Museum and Exhibition Design Group, the directory of consultants in Museums Yearbook; case study material in Museums Journal and Museum Practice; advertisements in Museums Journal; resources lists in Museum Practice; conferences and exhibitions; brochures and other direct mail.

For bigger contracts, over £10,000, it is particularly important that the recruitment process is seen to be fair and transparent. Clients should therefore advertise the tender in a suitable publication(s) such as Museums Journal, asking interested consultants to contact the client for further information.

Inviting proposals

To prepare a detailed proposal, consultants will need an outline brief for the project specifying the requirements, objectives, budget and time constraints.

The consultant's proposal should contain:

- their understanding of the problem and the brief
- names and CVs of the consultant(s) who will be doing the work
- experience and examples of previous projects
- references - these should be specified in the brief
- work plan and timescale
- reports and/or systems to be supplied
- fees
- inputs required from the museum.

Interviews

Most experts recommend a short-list of three candidates. Consider whether you require a straight interview or a presentation of the proposal. Consider who should be present and ensure the person who has the authority to make the appointment is there.

Refining the brief

A brief is not legally binding. It is a blueprint for the project; more than anything, a good brief ensures you end up with a satisfactory result. It should cover all the points listed under Defining and planning the project (above). Once you have made your selection, the details of both your brief and the consultant's proposal should be discussed, refined and agreed upon before any contract is signed (see figure 2).

Figure 2: The contract

The contract need not necessarily involve solicitors and may be a comprehensive letter of appointment.

Ideally, it will cover most or all of the following:

- fee: how and when it is paid
- expenses: including preparation, travel time, preliminary meetings
- timescale: including deadlines for any outputs, such as preliminary and final reports
- output: how many reports/workshops/brochures/action plans? Do you require a draft report and in what form?
- responsibilities of project staff
- insurance: does the museum have any protection if a project goes wrong? Should it require the consultant to arrange this type of cover and if so, should the cost come out of the fee? Does the consultant carry professional indemnity cover?
- copyright and moral rights: under the Copyright Designs and Patents Act 1988, the consultant will retain all rights to any tangible output - such as photographs, reports, or designs - unless they formally assign them to the museum/client
- confidentiality
- ethics: consultants should agree to work within the requirements laid down in the MA's Code of Ethics
- health and safety: the Construction (Design and Management) Regulations 1994 give specific responsibility to the client, designer, planning supervisor, principal contractor and subcontractors on projects over a certain size. Breaching these is a criminal offence
- working with children: museums must ensure any consultants having contact with children and young people under the age of 18 have applied to the Criminal Records Bureau or Central Registration Body in Scotland for a disclosure of any criminal record
- postponement or cancellation: what happens if either side pulls out?
- arbitration: in case of a dispute, should, for example, the RA or a senior museum worker be named as an arbitrator? In the case of the relationship breaking down, should an 'escape' clause be included?
- changing the terms of reference: who can do this and how should it be done?
- subcontracting
- access: to museum facilities, administrative support
- publicity
- how regularly will project meetings be required and who will service them?

Managing the project

Setting up

Staff and volunteers should be prepared for the consultant's arrival and fully briefed on the project and their own role. Key people should be introduced formally before the project starts.

The consultant should be encouraged to talk to as many relevant people as possible and gain an insight into the way the museum works. Ensure all necessary information is made available by staff within the agreed timescale.

Start a contract file. By the end of the project this will contain:

- a copy of the brief and terms of reference
- a copy of the proposal
- any changes to the brief or proposal
- a record of all payments
- minutes of meetings and feedback sessions
- notes from any telephone conversations
- implementation plan
- the project evaluation

Monitoring progress

Progress meetings should be a formal part of the project. Progress should be measured against the agreed objectives in

the brief. Voice any concerns about the direction or standard of the work as early as possible and formalise these in writing if necessary. Clarifying your expectations may be enough to put the project back on track. Be firm about the museum's priorities and ensure these are not misunderstood or being subjugated to the consultant's own. The last resort is to cancel the project, rescue what you can and employ another consultant. It may be, however, that as work proceeds the brief needs to be altered. This should be done only after consultation with all key parties and should be agreed in writing.

The consultant's report must be presented in a format that is accessible and helpful to the museum and other end users. Ask for a draft report that can be discussed by the project team before the final document is written.

If the finished product does not meet your expectations, establish where the fault lies and discuss ways of remedying this with the consultant.

Evaluate

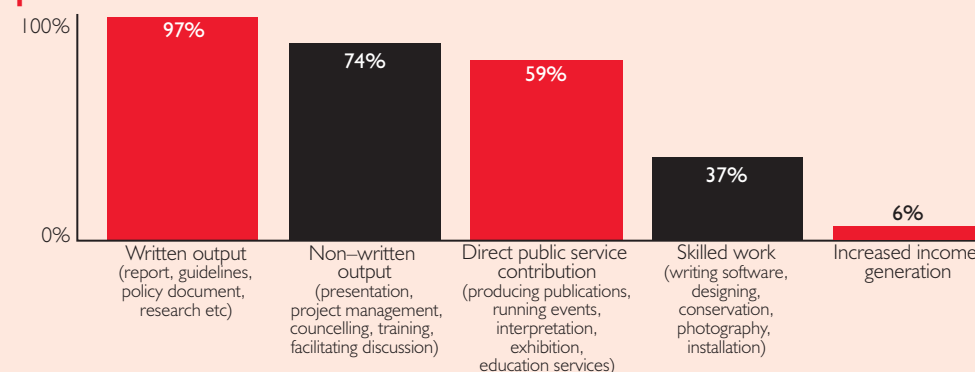
According to the MA survey, museums hardly ever evaluate their consultants formally. However, assessing the effectiveness of a project will be of help to the museum in commissioning future projects, and to the consultant in tendering for further work. For training, workshops, education days or public events, museums should consider asking participants for their feedback. The museum's evaluation should cover whether the project objectives were met, any difficulties or problems and how these were overcome, an assessment of the consultant(s), adherence to brief, budget and timescale, and the quality of work produced.

Follow up

■ The action plan should be discussed again with the consultant and refined before their departure

- Consider inviting the consultant to help with any implementation work. If this is not included in the contract it is important to write a new brief and get a new quotation and proposal, even if it leads directly on from the current assignment
- Discuss circulating reports among the press or other interested parties, and writing up project results for journals such as Museum Practice (contact the editor first)

Figure 1: What type of output do consultants/freelances usually produce for a museum?



Sources and further information overleaf