

Starting Out: Museum Education Consultants and Freelance Educators

Introduction

This information sheet has been produced to offer advice to consultants and freelance workers* operating in the field of learning in museums**. The advice can also be applied to freelancers working in galleries, archives, libraries and historic properties. It was developed in 1996 by experienced freelancers in consultation with members of the Group for Education in Museums (GEM) Freelance Network; it is regularly checked and updated. As a result of the increasing number of freelance educators and consultants working in museums, the GEM Freelance Network was founded as a local group of GEM. It is a self-help group which supports its members by providing training and networking opportunities; raising awareness of freelance issues; collaborating on joint projects and making available a list of members via the GEM website.

This information sheet outlines issues which should be considered when becoming self-employed in this specialist area. Both the museums and the freelancer should be clear about the task and each other's expectations. Communication and co-operation are vital for the professional partnership to succeed. Although learning has a high priority for museums, it is often not possible to employ museum education specialists as full-time members of staff because of budgetary constraints. The number of consultants and freelancers is growing. They are crucial in bringing the required skills into museums and galleries.

*** Freelance worker or consultant**

There is some confusion about these two terms

Consultants discuss, inform and advise on a subject within their area of expertise i.e.: museum learning; they may be employed or self-employed

Freelance workers sell skills rather than advice; they are self-employed.

The term freelancer will be used throughout to include both these definitions.

Starting out: some points for consideration

Be prepared:

- Can you cope? Are you self-disciplined, determined, flexible, self-reliant, confident?
- What will your support networks be?
- Are you equipped to work from home? You will require office space and basic office equipment such as computer, telephone etc.

Keeping up to date and in touch

- Join the GEM and the Freelance Network – contact details below. The network has an email discussion list and some members of the group are happy to give support to new freelancers
- Join the GEM email discussion list (see: www.gem.org.uk)
- Keep CV and references up to date
- Maintain a portfolio to show to prospective clients

- Keep in touch with your profession and maintain professional development through subscription to relevant publication and attending training courses and conferences
- Contact your local Business Link for business start up advice and training.

Financial and legal matters

- Register with the appropriate authorities e.g.: Inland Revenue. Department of Social Security
- Keep track of your income and expenditure. Will you keep your own accounts? Do you need to go on a training course? Do you need an accountant?
- Investigate public liability insurance; professional indemnity, insuring your car for business use; personal pension scheme
- Consider finding a part-time job to ensure a regular income while you are establishing yourself.

Marketing and presentation

- Undertake market research: what is your market? What is the competition? How will you market your services e.g.: advertising, leaflet, networking, word of mouth, create a website? Where will the first year's work come from?
- Send your details to local museums and museum related organisations
- Create a professional image: headed stationery, business cards, efficiency and appearance
- Join the GEM Freelance Network and post your details on the GEM website.

The work

The kind of services freelancers will offer will vary. What do you want to do? Are you going to: offer direct teaching or training sessions; undertake special projects such as writing resources; conduct consultation and evaluation; write policies or plans; or will you offer advice on a consultancy basis? What is your speciality? Make sure that you plan your work schedule to avoid coinciding deadlines and remember to allow time for holidays.

Continuing professional development (CPD)

Training and keeping up to date with professional issues is expensive when you are freelance: you pay the course fees and travel costs yourself; you are unpaid while attending courses and unable to work on other projects. However, professional development is very important and can also be considered a good networking opportunity. Seek out your local branch of Business Link for advice and support on setting up a business. Keep yourself informed of all museum related courses through the Museums Association, MLA and GEM. You may wish to consider acquiring a first aid qualification, which could be useful if working with the public. All fees for training, conferences and courses should be tax deductible.

Checklist before accepting a project

- Do you understand exactly what the client wants you to do? Can you do it?
- Are you interested in and enthusiastic about the project?
- Is the timescale realistic?
- Is the budget realistic? Will there be interim payments?
- What are the contact hours?
- Will you be in charge of anyone: e.g.: other freelancers, staff or volunteers?
- Who will be your main contact for the project?
- Agree interim deadlines for different stages of the project. Consider writing progress reports

- How will the project be evaluated?
- Who has editorial control?
- Who has copyright? The author owns the copyright unless it has been assigned to the institution in writing. The freelancer also has intellectual property rights of his/her ideas which cannot be used without payment: these ideas must be expressed in writing
- Who has to approve the final text before production?
- Will you be paid for speculative meetings?
- Can you sub-contract any of the work?
- Will you work at home, at the museum or both?
- Are the facilities that you require available?
- What background information do you need from the museum?
- Make sure that everything is in writing as a formal agreement.

Legal requirements

When working with school groups and the public in a museum or gallery it is essential that you are aware of relevant health and safety regulations. Ask the museum to tell you about its procedures and facilities e.g.: ask about the location of the fire exits and assembly points, fire extinguishers, first aid kit, trained first aider and the nearest telephone. Establish whether you are covered by the museum's insurance. Investigate the requirements of the Children's Act and the Vetting and Barring Scheme as it relates to your work. The length and frequency of sessions, age and vulnerability of participants and the status of the workshop leader all have implications in terms of safeguarding. Contact details of organisations who can advise on this are listed below.

Charging

The following should be considered when deciding upon a fee:

- A reasonable hourly/daily rate – remember you are not paid for every hour of every day
- Overheads (proportion of household/office expenses e.g.: rent/mortgage, heating, lighting, telephone bills)
- Administration time
- Travel time and costs
- Training time and costs
- The cost of preliminary meetings
- Personal pension premiums
- Depreciation of equipment used for your business e.g.: car, computer etc
- Holiday time
- Tax and national insurance payments
- Allowance in case of illness
- Membership of professional organisations
- Other expenses such as photocopying, postage, stationery, publications, printer ink.

All business related costs are tax deductible.

It is often difficult to stick to figure that you have arrived at in costing a proposal but it is very important to do so. You might be willing to take a discount for a long piece of work or to generate business when starting out but you have to cover costs realistically or it is not a viable business and you are undercutting other freelance professionals.

The brief

The brief is a description of the project written by the museum staff. It should outline exactly what the museum expects you to do and should contain the following elements:

- Background to the project and the museum
- Purpose of the work
- Skills and experience required for the project
- Details of the end product required
- Timescale including dates of interim meetings and reports
- Budget of project including fees and any other expenses, such as travel costs
- Details of contact person
- Method of work including input from museum staff and resources available from the museum
- Details regarding copyright and editorial control
- Tender procedures
- Insurance arrangements and requirements
- Details of equal opportunities policy.

The agreement

After the brief has been written and you have been accepted for the project (which may involve you writing a proposal and/or being interviewed), an agreement must be drawn up between you and the museum, outlining the responsibilities of each party. This may be initiated by you. It is a two way process and both parties must agree. Each party should receive a signed copy of the agreement. Make sure that the agreement covers:

- Details of the exact work to be done, the end product required
- Facilities and resources to be provided by the museum
- Payment terms (interim payments or lump sum)
- Insurance arrangements
- Timescale including dates of interim meetings or reports
- Details of how the project will be evaluated
- Main contacts – who is the project leader?
- Procedure for acknowledgement of your work
- Information about who has editorial control and who will own the copyright
- Procedure in case of illness, cancellation and postponement
- Arbitration procedure if required
- Confidentiality clause if required.

Project management

When the project or activity is up and running it is essential to review it and make changes if required. Points to consider are:

- Who has leadership of collaborative projects?
- The need for regular meetings and progress reports
- Ensure that deadlines for different stages of the project are met, or rearrange the timescale if necessary
- What is the procedure for making changes to the agreement? Ensure everything is put in writing
- Who is responsible for ongoing evaluation?

On completion of the project

- Check whether you will be acknowledged or credited in anyway
- Ask for a testimonial from the museum
- Return any borrowed material
- Take photographs to add to your portfolio of work

- Ensure that you receive a copy of the end product (e.g.: resource pack)
- Keep in touch with the museum for future projects or follow-up publicity etc.
- Remember to invoice for the final payment
- How can effectiveness of the project be measured?
- How can input be measured?

Evaluation gives you and the museum to opportunity to find out what when right and what went wrong and to find out why. It is still not a common procedure in many museums. It is very useful to write it into any project proposal if possible. Make sure that you receive details of any evaluation which is undertaken after your completion of the project. It is valuable to have your input to the project evaluated, for example, by asking the museum to fill in an evaluation sheet about your work.

Addresses

GEM Freelance Network

Convenor: Maggie Monteath
24 Courts Mount Road, Haslemere, Surrey GU27 2PP
Tel: 01428 653584
Email: maggiemonteath@hotmail.com

Group for Education in Museums

54 Balmoral Road, Gillingham, Kent, ME7 4RP
Tel/Fax: 01634 853424
Email: office@gem.org.uk
www.gem.org.uk

The Museums Libraries and Archives Council (MLA)

Grosvenor House, 14 Bennetts Hill, Birmingham, B2 5RS
Tel: 0120 345 7000
www.mla.gov.uk
Email: info@mla.gov.uk

Museums Association

24 Calvin Street, London, E1 6NW
Tel: 0207 426 6970
<http://www.museumsassociation.org>

Criminal Records Bureau

Registration Information Line 0870 90 90 822
CRB Registration Team, PO Box 110, Liverpool, L69 3EF
<http://www.crb.homeoffice.gov.uk/>

The Independent Safeguarding Authority

<http://www.isa.gov.org.uk/>

The Children's Legal Centre

Child Law Advice Line:
0845 120 2948
<http://www.childrenslegalcentre.com/>

Small Business Advice Service

<http://www.smallbusinessadvice.org.uk/hlep/sbasove.asp>

Business Link

www.businesslink.gov.uk

Other relevant museum / heritage professional groups

Engage: <http://www.engage.org/>

Visitor Studies Group: <http://www.visitors.org.uk/>

Association for Heritage Interpretation: www.heritage-interpretation.org.uk

International Museum Theatre Alliance: <http://www.imtal-europe.org/>

British Interactive Group: <http://www.big.uk.com/>

Further reading

Choosing and using a Museum Education Consultant or a Freelance Educator, 2009
(companion information sheet, available GEM website www.gem.org.uk)

Museums Association – Briefing paper: Working with consultants
<http://www.museumsassociation.org/publications/resources>

Museums Association – Code of ethics <http://www.museumsassociation.org/ma/10934>

MLA Guidance on Safeguarding

http://www.mla.gov.uk/what/policy_development/learning/~/_media/Files/pdf/2008/Safeguarding_v5

Independent Safeguarding Authority factsheet on controlled and regulated activities
<http://www.isa.gov.org.uk/pdf/Regulatedandcontrolledactivities.pdf>

Arts Council advice on setting up a business

http://www.artscouncil.org.uk/media/uploads/documents/information/business_phpHkikAd.doc

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** Although museums have been taken as the context for this document, many of the issues also apply to other cultural sectors, and the term “museum” should be taken to include this broader range of organisations.