



## Association of Independent Museums

The National Body Connecting, Supporting and Representing Independent Museums

### Association of Independent Museums AIM E-News – November 2011 – Number 27 - Extracts

#### **Outstanding visitor experiences – find out more at the next AIM Conference – 14-16 June**

The annual AIM Conference on 14-16 June *Would You Come Again? Growing the Visitor Experience at the Museum* will focus on what makes a visitor experience outstanding, one that makes you want to tell your friends and one that you would happily repeat. Hosted by STEAM: Museum of the Great Western Railway, in conjunction with the National Trust at Heelis, Swindon, Wiltshire.

#### **Campaign launched to increase legacy giving**

The Legacy10 nationwide campaign launched at Tate earlier this month aims to increase the number of people who leave money to charity in their wills. At present only 7% of people do this (although 56% of adults donate to charity in an average month). The campaign hopes to increase this to 10% and has its genesis in the Chancellor's new inheritance tax rules announced in the budget statement. From April 2012 any estate that leaves at least 10% to a charitable cause can receive a cut in inheritance tax from the current level of 40% down to 36%. A Populus poll found that over 80% of people in the UK were unaware of the changes and that 70% would now consider making a legacy. Legacy10 is independent, run by a committee drawn from business, culture and the charitable sector. Chaired by Roland Rudd, chairman of RLM Finsbury, the campaign is backed by a number of public figures including Sir Richard Branson and Lord Myners, who have pledged to leave at least 10% to charity. Welcomed by Culture secretary Jeremy Hunt, the campaign is planning a series of events (including a National Trust conference on improving legacy programmes for charities) and a new scheme to encourage gifts of pre-eminent objects and works of art to the nation, to be launched next year. <http://legacy10.com/> and [http://www.culture.gov.uk/news/news\\_stories/8586.aspx](http://www.culture.gov.uk/news/news_stories/8586.aspx)

#### **New approach required for fundraising**

Strong personal relationships with funders is no longer enough to ensure their support new research commissioned by the Department for Culture, Media & Sport (DCMS) has found. GfK NOP Social Research shows that donors are now more exacting in their expectations, creating a new requirement for organisations to demonstrate sound business planning and financial management as well as benefits for donors. Whilst some have taken this on board others have not responded to the culture shift now required. Recommendations include putting fundraising at the heart of the organisation, building relations with donors and auditing fundraising within the organisation; and strengthening the environment for fundraising by ensuring access to training, brokering relationships and facilitating financial support. The research is the latest from the three-year Culture & Sport Evidence (CASE) programme, led by DCMS in collaboration with Arts Council England and English Heritage. [http://www.culture.gov.uk/what\\_we\\_do/research\\_and\\_statistics/7290.aspx#fundraising](http://www.culture.gov.uk/what_we_do/research_and_statistics/7290.aspx#fundraising)

#### **Gift Aid claims time limit**

Members might like to be reminded that HMRC reduced the time limit for backdated Gift Aid claims from six years to four years beginning in April 2010. At least one member has come unstuck over this change: the best approach is to keep up to date with Gift Aid claims, ensuring that there is no likelihood of loss as a result of timescale problems. [http://www.payrollgivingcentre.com/attachments/Budget\\_Changes\\_for\\_Charities.pdf](http://www.payrollgivingcentre.com/attachments/Budget_Changes_for_Charities.pdf)

### **Register with Funding Central**

The National Council for Voluntary Organisations free Funding Central website enables charities, voluntary organisations and social enterprises to search for available grants at local, regional, national and EU level. Registered users can receive a weekly email with details of relevant new funding opportunities. Funding Central is funded by the Cabinet Office's Office for Civil Society. <http://www.fundingcentral.org.uk/Default.aspx>

### **£20 million for positive social projects**

A new £20 million revenue grant scheme has been launched by the Office for Civil Society to encourage positive social activity in England. The Social Action Fund offers grants of £100,000+ to projects that expand volunteering and giving of time, money, knowledge and assets. Open to voluntary, public and private sector organisations, its priority areas include encouraging neighbourhoods to work together; utilising the enthusiasm generated by the London 2012 Games, and encouraging all generations to get involved in volunteering and charitable giving. A second round of applications will take place in early 2012. <http://www.cabinetoffice.gov.uk/news/%C2%A320-million-social-action-fund-opens>

### **“Train your trustees”, says Charity Commission**

The Charity Commission has found that many organisations do not provide any training for new trustees. Its online research suggests that trustees are not being prepared for the duties and responsibilities they will face. The findings appear in the first of a new series of bulletins which will provide information on themes and trends in the charity sector, as well as promoting good practice. [http://www.charitycommission.gov.uk/RSS/News/pr\\_reg\\_bulletin.aspx](http://www.charitycommission.gov.uk/RSS/News/pr_reg_bulletin.aspx)

### **Trustees encouraged to review their own financial controls**

The Charity Commission has launched a project to help charities review their financial controls and systems of risk management, seen as a step towards a culture change in the sector in which trustees gain confidence in their own abilities and judgement, and take greater responsibility for maintaining standards of governance, anticipating risk and nipping problems in the bud. Charities in England and Wales can apply for a free review of their systems of financial management and controls to be conducted by a member of the Institute of Chartered Accountants. The commission's Sam Younger said: "In the past, we were there on the ground with individual charities, holding their hands, pushing and pulling them in the right direction, taking the reins when problems arose. In future, we will be taking a more hands-off approach – encouraging charities to make their own way with the help of maps and road signs that we made available." Further information: [www.charityreview@icaew.com](http://www.charityreview@icaew.com)

### **Review of Charities Act 2006**

A wide-ranging review of the Charities Act 2006 is to be led by NCVO (National Council for Voluntary Organisations) president Lord Hodgson of Astley Abbots. The review will consider what a charity is and what are its roles, what charities need to have/be able to do to deliver those roles, and what the legal framework should be like to meet those needs, as well as the role of the Charity Commission and the charity tribunal. The aim is to consider whether the legal framework for charities is fit for purpose now and in the future. <http://www.thirdsector.co.uk/News/GovernanceBulletin/1103085/Conservative-peer-lead-review-Charities-Act-2006/AC24537363E2B56633CA10772B138C60/?DCMP=EMC-CONGovernanceBulletin>

**Sale and transfer of collections to other museums** is to be analysed by new Arts & Humanities Research Council Fellow at the Museums Association (MA), Janet Ulph, Professor of Commercial Law at the University of Leicester. She will work alongside the MA's Ethics Committee to provide guidance on legal issues surrounding sale and transfer. <http://www.museumsassociation.org/news/24102011-ahrc-fellow-to-look-into-ethics-of-disposal-by-sale>