

# Case study



See what they had to say

## Bakewell Old House Museum

Is based in a Tudor building within the heart of the Peak District. It tells the stories of the inhabitants and owners of the building from Christopher Plant, the tithe collector, Sir Richard Arkwright who housed his mill workers there, and the Pitt family who lived in one of the cottages in Victorian times.

“Without MDEM support we wouldn’t have had knowledge and expertise to make changes which initiated everything else. We would have survived but not thrived.”

**Mark Copley,**  
Museum Manager,  
Bakewell Old House Museum

# 01. Summary of activity

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**Bakewell Old House Museum has received support over many years from MDEM through training events, consultancy, in-depth programmes, small grants and networks.**

This support has enabled the museum to make changes to its governance, to develop its approach to collections care, audience engagement and forward planning.

Museum volunteers have benefited significantly from the breadth and depth of training on offer and the Museum Manager values the ability to connect and collaborate with other museums through networks and programmes.

In December 2017 a member of the Council of the Bakewell and District Historical Society (BDHS) joined a MDEM Trustee Networking Group and discovered that the museum was operating as an Unincorporated Charity. The members of the Society's Council were not only members but were in fact trustees carrying legal obligations.



“This concerned us, and we began to think about the state of the Society's governance. Several matters needed attention and consideration, the priority in our view was to become an Incorporated Charity.”

**Stephen Coates, Trustee of BDHS**

# 02. Challenges and opportunities

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**BDHS was founded in 1955 with the purpose of saving the building and establishing it as a museum. The society were successful in doing this and they have continued to oversee the museum, building repairs and operations for almost sixty years.**

Upon discovering the society was Unincorporated there were some members who did not see the need to change the status, as it had been operating that way for a long time. There was also a perception that becoming incorporated would involve a lot of work and be prohibitively expensive. Stephen Coates identified the need to make the case for incorporation and set this out in a short paper for the society.



The Society's President acknowledged the need for change and potential benefits of Incorporation. Changes were implemented to leadership roles which led to a new Chair being appointed and the process of incorporation began. Several Council members who became aware that they were considered trustees expressed a preference to continue as committee members, they did not want the responsibilities of being trustees.

The process of becoming incorporated took place during the pandemic and frustratingly, lasted for almost two years. The Society is an organisation of Members and so formal approval of the membership at EGM and/or AGM was required at each stage. It was supported by a small grant from MDEM which enabled the museum to access specialist advice from a charity lawyer.

## 03. Capacity building

**Having established a Charitable Incorporated Organisation (CIO) the board identified a need to build capacity and resilience.**



“There was a need to transform the thinking of the Board, from being broadly operational and short-term thinkers and operators into a body of more strategic thinkers. We also needed to consider, plan and manage board member succession.”

**Stephen Coates, Trustee of BDHS**

**The timing of this recruitment coincided with the MDEM Succession Planning Programme. Two trustees took part in the programme and their participation alongside conversations with MDEM, led to a decision by the board to advertise trustee positions nationally.**

In April 2021 trustee roles were advertised through a range of sources, local free press (hard print), Leicester University Museums Job Desk, the Association of Independent Museums and CVS. The museum had already completed a Skills Audit as a result of an Organisational Health Check and that led to the development of a Recruitment Plan, Role Descriptions, an Advertisement, and an Induction Pack.

**“We would have struggled to do the visioning process without Heather’s support and guidance.”**

**Stephen Coates, Trustee of BDHS**



## 04. Outcomes

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**The museum received c.45 responses to the trustee adverts and from this 6 people were appointed. The board had decided that this was the most it could assimilate at one time. The new trustees who are based across the UK went through an induction process and took up their posts in May 2021.**

Approximately one year after the initial round of trustee recruitment (in May 2022) the museum went out to national advert again, this time in particular searching for a successor to the existing Chair. Through the advert they managed to attract a locally based retiree with 15 years' experience as a trustee of a national museum.

They also appointed a Listed Buildings specialist based in York as a trustee. Following these appointments, the museum undertook a visioning exercise which was supported by MDEM who enabled it to be facilitated by Heather Lomas. The sessions helped to define the Purpose, Vision, Mission and Values of the museum.

**Since the initial trustee recruitment in April 2021 the museum has:**

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- 1** Appointed 8 trustees in two cohorts, including a Chair. They have also lost two of the trustees appointed in May 2021; both served for c12 months and left for personal reasons. Both had made significant contributions.
- 2** Successfully reduced the age profile of the board. The average age was c.72. It is now c.47.
- 3** Appointed 'museum professionals' on the board (who work in much larger establishments than the Bakewell Old House Museum). They bring with them an insight into contemporary issues related to the profession and the sector.
- 4** Successfully introduced the concept of 'professional trustees' to the society and demonstrated how it enables the board to operate strategically and more professionally.
- 5** Established the principle of external recruitment in order to ensure adequate succession and organisational resilience.

**"I think we can do a lot more to reconnect with the local communities. It was the local community who rose up and saved the building. It was all done by volunteers."**

Mark Copley, **Museum Manager**



## 05. The future

The museum has had its first full year of operating post pandemic, and it is making significant progress. In 2022 the museum:

**1** Engaged audiences totalling 6,719 across 190 days, this is up from 6698 people across 230 days in 2019.

**2** Volunteer numbers are growing which means the museum can look at opening seven days a week (its currently open five days).

**3** 335 schoolchildren were engaged, up from 90 in 2019.

**4** Net income has increased by 10% through the introduction of new initiatives and the development of profitable activities which fully align with the brand of the museum.

The society is now 70 years old and the Museum Manager, Mark Copley who was appointed in December 2021, can see potential to build on the founding purpose of BDHS.

Most visitors to the museum are from across the country and there is an opportunity to engage more people locally and give them a feeling that it's their museum.

Activities to raise the profile of the museum locally may include having a presence in town and the capturing of stories related to Bakewell residents and the surrounding farming communities.

"While the current cost of living crisis will undoubtedly impact our operating environment over the coming period, we are confident that the foundations laid (much with MDEM support) will enable us to meet the challenges and further improve performance going forward."

**Mark Copley, Museum Manager**

"We were astonished at our success in 2021. The people we recruited are brilliant practitioners working in other museums. We have very few locally-based Board members but it works because as a result of the pandemic the concept of working remotely has become widely accepted."

**Stephen Coates, Trustee of BDHS**



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