

ADRIAN WAITE

Kirkby Stephen Museum and Heritage Centre Business Case



1. The Purposes of this Business Case

1.1 This Business Case has the following purposes:

- To outline what a museum and heritage centre in Kirkby Stephen could look like, what benefits it would bring and how it could be created.
- To encourage discussion in Kirkby Stephen and the Upper Eden generally about whether the local community would like to have a museum or heritage centre and, if so, what sort of museum or heritage centre it should be.
- To enable discussions to take place with potential partners who could help such a museum or heritage centre to be created, either financially or in other ways.
- To identify the next steps to be taken.

1.2 I am an elected member of Kirkby Stephen Town Council, a Trustee of the Northern Viaducts Trust, a member of the committee at the Upper Eden History Society, a member of the committee of the Appleby Archaeology Group, and a member of several other organisations. However, I have written this paper in my personal capacity and it represents my own views and not necessarily those of any other individuals or organisations.

2. Introduction

2.1 I think Kirkby Stephen should have a museum and heritage centre that would showcase the fascinating history of Kirkby Stephen and the Upper Eden area. This wouldn't just be something that would be good for local people to have, but would be an important part of the tourist offer and therefore of the local economy.

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- 2.2 The Upper Eden has been settled since prehistoric times. The Romans built a fort at Brough and buried a cavalry helmet at Crosby Garrett. In the Viking age, Danish settlers founded Kirkby Stephen and carved the Loki Stone. In the middle ages the Upper Eden was filled with castles and pele towers, Kirkby Stephen got a market charter, Andrew Harclay won the Battle of Boroughbridge and the Musgraves were buried in Kirkby Stephen church. In the seventeenth century Kirkby Stephen sided with Parliament against the King and Lady Ann Clifford restored the Clifford estates. In the nineteenth century the industrial revolution brought the mills and the railway to Kirkby Stephen. And these are only a few of the highlights!
- 2.3 The economy of the Upper Eden is dependent on tourism with people attracted by the scenery and the outdoor activities as well as the history. But, as this is Cumbria, there is a lot of rain – and what is there to be done in the rain? This is why it is important for tourist towns to have ‘wet weather’ attractions that can act as a magnet in the ‘Cumbrian sunshine’.
- 2.4 The Arts Council considers that strong museums matter because:
- Museums are at the very heart of our cultural identity: they’re places for sharing stories, ideas and connections.
 - Museum collections are much more than individual objects: they’re irreplaceable public assets. They’re our heritage, and people trust museums to safeguard them for the next generation.
 - Museums shape communities: whether that’s by bringing together people with shared interests or providing places and events that draw local communities together.
- 2.5 When I worked for Copeland Council in the 1990s, we had the challenge of transforming post-industrial Whitehaven into a tourist town and central to this was the creation of the Beacon Heritage Centre. A museum or heritage centre really can act as a catalyst for economic activity. Carlisle has Tullie House. Kendal, Penrith and Keswick all have museums.
- 2.6 Kirkby Stephen does, of course, have the excellent Stainmore Railway Centre and the brilliant display of early medieval carvings in the church, but what I have in mind is a museum or heritage centre that would cover the whole of the history of Kirkby Stephen and the Upper Eden, would complement existing displays and would encourage more footfall in businesses in the town and surrounding villages. It would also be a useful resource for the town and surrounding villages, helping the schools to teach local history and providing another focus for the community.
- 2.7 This idea has been considered previously and it is easier to talk about a museum and heritage centre than to create one. There would be a need to identify suitable premises, to put together the exhibits and displays, to find staff and volunteers and to find finance. However, considering the advantages that it would bring to Kirkby Stephen and the Upper Eden I think the effort would be worthwhile. I think now would be an opportune time for the public, community & commercial bodies in Kirkby Stephen to come together to make a museum and heritage centre a reality.

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3. The Problem and the Opportunity

- 3.1 Kirkby Stephen developed in pre-modern times as a market town for the Upper Eden Valley. It is well resourced with local shops, a good range of community facilities, primary and secondary schools, and has remained a vibrant and sustainable community. It has become a popular place to which to retire. However, local sources of employment are limited and many residents either work elsewhere or in small, often home-based businesses.
- 3.2 The economic life of the area is not strong and is considered vulnerable. Kirkby Stephen needs to be sustained if it is to continue to be the thriving centre of the Upper Eden. It should be both functional and fun with jobs for those leaving the local Grammar School, and enough going on to attract visitors, and most important to hold them in the neighbourhood for a few hours or a couple of days – or to use it as a base for a short holiday. If not, there is a danger that the area will become a centre for retirees and second home owners as opposed to a thriving community in its own right.
- 3.3 Kirkby Stephen is right in the centre of what looks on the map like a huge clover leaf of wonderful nature reserves, The 2016 extensions brought the Yorkshire Dales north and the Lake District eastwards to the doorsteps of the town and the North Pennines Area of Outstanding Natural Beauty stretches northwest from its gates.
- 3.4 Kirkby Stephen has always attracted tourists and holidaymakers. However, there is a widely held view that its location, close to the M6 and A66, and to high quality countryside, ought to make it possible for Kirkby Stephen to attract a share of the regional market for holidays and day visits, and that its inability to do so arises largely from the limited nature of its tourism offer. There is a shortage of 'wet weather attractions' in the town.
- 3.5 Eastern Westmorland is not and never has been part of the 'territory' of any museum. There is therefore a genuine gap in museum provision and a new local history museum could therefore be established to cover this area entirely without conflicting, duplicating or even in substance encroaching on the activities of any existing museum.

4. Potential Partners

- 4.1 There are several organisations in Kirkby Stephen and the Upper Eden with an interest in the local; economy and / or local history that could contribute to the museum or heritage centre. This section describes some of them, but not in order of importance.
- 4.2 Upper Eden History Society is a Society for people who have an interest in the history of Kirkby Stephen and the upper part of the valley of the River Eden in Cumbria. The Society has an extensive archive of historical information that it has recently made available to members and the public. Lecture meetings are held every month in the autumn, winter and early-spring months. Non-members are welcomed for a small admission charge. In the summer months visits are arranged to take members to places of historical interest.
- 4.3 Encounter Eden was established as a social enterprise in early 2017 with the aim of bringing new life to the economy of the Upper Eden and southeast Cumbria. Encounter Eden intends to make a profit and surpluses will be used by a charitable foundation to support local projects and the community. Encounter Eden's purpose is to support and develop the local economy, creating a happier and more thriving community.

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- 4.4 Northern Viaduct Trust is a small charity, established in 1989 to acquire and maintain part of Cumbria's railway history in the Upper Eden Valley. They currently look after Podgill, Merrygill and Smardale Gill Viaducts, Drygill Bridge near Smardale Gill Viaduct and the Millennium Bridge in Kirkby Stephen as well as the track bed between Stenkrith and Merrygill Viaduct. There are permissive footpaths across all their viaducts and between Stenkrith and Merrygill Viaduct.
- 4.5 Stainmore Railway Company is a volunteer-run, non-profit preservation company formed in 2000 with the aim of restoring Kirkby Stephen East railway station. In 1997 a company called Stainmore Properties Ltd. was formed, with the intention to convert Kirkby Stephen East into an authentic North Eastern Railway focused heritage centre representing the early 1950s. The Stainmore Railway Company was subsequently formed to restore the site. Since then repairs have been made to the roof and station, a number of rooms have been restored and a short section of track has been laid along the formation of the old Eden Valley Railway, with some sidings and yard infrastructure within the station area and surroundings. A quantity of rolling stock that is authentic to the site has also been brought in.
- 4.6 The Parish Church is a well-known historic building that contains many historic artefacts that are displayed for visitors, as well as being a thriving church and a centre for the community.
- 4.7 Businesses in Kirkby Stephen have recently established a Business Forum.
- 4.8 The Upper Eden Community Interest Company operates the Information Centre in Kirkby Stephen.
- 4.9 Kirkby Stephen is a Walkers are Welcome town with an active Walkers are Welcome group; and is often used as the venue for meetings of the Cumbria Wildlife Trust, offering the potential for partnerships around natural history.
- 4.10 Kirkby Stephen Town Council is, in principle, in favour of a museum or heritage centre in Kirkby Stephen.
- 4.11 Westmorland & Furness Council was established in April 2023 and is a unitary authority that serves Kirkby Stephen among other places. It is responsible for cultural and leisure services including museums and heritage centres but does not offer any museums services or heritage centres in the Kirkby Stephen area. It is committed to developing the arts in the area and could be persuaded to assist in the creation of a museum or heritage centre in Kirkby Stephen. Its Council Plan states that it:

"Will support new business creation and actively support the cultural economy to thrive."

5. Potential Venues

5.1 Introduction

- 5.1.1 This section considers some potential venues. It should be noted that I have not necessarily discussed the use of these venues with their owners or occupiers. The use of any of these venues would be dependent on the agreement of the owners to provide accommodation for the museum or heritage centre, offer the museum or heritage centre a lease or to sell the venue to the museum or heritage centre as appropriate. These venues are not arranged in any order of preference. There may be other potential venues and suggestions would be welcomed.

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5.2 Oddfellows Hall

- 2.1.1 The Oddfellows Hall is located in Market Street in Kirkby Stephen town centre. It is believed to be a nineteenth century building that has had several uses down the years, including being a cinema. The most recent use was as a McColl's supermarket, but since McColl's ceased trading the building has been disused. It is owned by a development company who are expecting the tenants to surrender the lease at which point they would prefer to dispose of it, but would be prepared to consider another lease.

5.3 Kirkby Stephen Church

- 5.3.1 Kirkby Stephen Church is located in the Market Square in Kirkby Stephen Town Centre. The current church dates from the thirteenth century, includes fourteenth century windows and medieval roof bosses, and has a rich history that makes it, not only a building of great historic significance, but a place that stores historical artefacts of international significance. These include:

- The Loki Stone – a tenth century Anglo-Danish cross shaft carved into the bearded figure of a chained devil, representing the old Norse god Loki. This is the only example of one in Britain and one of only two in Europe.
- Stone carvings from Anglo-Saxon Northumbria dating back to the eighth century.
- Viking age carved beasts and hog-back tomb stones.
- Norman stonework from an earlier church and a Norman coffin.
- Thirteenth century piscina, sedilia and angel corbels.
- The Hartley Chapel containing the fifteenth century Musgrave tombs.
- The Wharton Chapel containing the sixteenth century Wharton tombs.
- Seventeenth century font and eighteenth century bread shelves.
- Nineteenth century organ and pulpit.



Kirkby Stephen Church

- 5.3.2 Kirkby Stephen Church is a Grade II* listed building that Historic England considers to be at risk. Its condition is assessed as poor and Historic England has classified it as priority A – at immediate risk of further rapid deterioration or loss of fabric with no solution agreed. It is described by Historic England as follows:

“Church of 1230 with later additions and alterations. C16 west tower, aisled seven bay nave of C13, transept to the north and chancel. Generally appears in good condition, but water dripping from the roof just inside the main south west door suggests that the nave roof, not visible because of the parapet, is in poor condition, placing the church at risk.”

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The Loki Stone

5.3.3 The church is used by the Church of England as a parish church. I understand that there is a small congregation with limited funds and that there are those in the congregation who feel that the church building does not currently meet their needs fully. For example, it lacks a kitchen and a toilet and is too large for the size of the congregation. There is also an ambition for the church to become more of a community hub. While the usual congregation is small, the church often attracts large congregations for weddings and funerals; and is often used as a venue for community events such as concerts. The church also allows the Upper Eden History Society to use the west end of the Nave for historical displays.

5.3.4 The opportunity in the church could include all or some of the following elements:

- Carry out essential repairs especially to the roof.
- Remodel the west end of the church to include a museum / heritage centre, meeting room, kitchen and toilets.
- Possibly include an extension to the north of the church.
- Possibly include a mezzanine floor or floors.
- Possibly include either the north aisle or the south aisle in the museum / heritage centre area.

5.3.5 Of course, a museum / heritage centre located in the church would strongly feature the history of the church itself as well as the general history of Kirkby Stephen and the Upper Eden.

5.4 Faraday House

5.4.1 A town museum or heritage centre could be located in Faraday House. Faraday House is located in Royal Arcade and has, until recently undergone little change from when it was a Sandemanian Chapel, Kirkby Stephen's earliest and celebrated nonconformist religious house. This could include a local history study centre and children's exploration into electricity celebrating Michael Faraday, his parents and family; and the history of nonconformism in the Upper Eden. I understand that the building is currently for sale.

5.5 Church House

5.5.1 Church House is located in Vicarage Lane and backs onto the churchyard. I understand it is owned by the church. Two rooms are available for letting, seating for twenty on the ground floor and forty on the first floor, with toilets on both floors. It is available for Church and voluntary groups and occasional statutory bodies. I understand it is not used for any other purposes.

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5.6 Local Links

- 5.6.1 The Local Links building was originally used as the Grammar School and is located in Vicarage Lane. It is owned by Westmorland & Furness Council and currently contains the Kirkby Stephen library, the offices of the Town Council and some other community facilities. There is land to the east of the building that I understand is also in the ownership of Westmorland & Furness Council on which there would be room to construct an extension to the existing building. In the past, it has been suggested that such an extension could be used to provide larger and more appropriate offices for the Town Council including a meeting room. However, it could also be used to house a museum or heritage centre as well as, or instead of, enhanced offices for the Town Council.

5.7 Information Centre

- 5.7.1 The Information Centre in Market Street is owned by the Town Council and leased to a Community Interest Company. The ground floor is currently used as an information centre, while the first floor is leased to a bicycle business and the cellar is unused. It has been suggested that the cellar could be used for a small museum or heritage centre. There would be problems with disabled access but there would be opportunities to link the existing activities in the information centre with new activities in the museum / heritage centre.

5.8 Kirkby Stephen East

- 5.8.1 Kirkby Stephen East is the location of the Stainmore Railway company that is a heritage railway company with a museum, retail outlet, café, workshops and a short section of working railway line. There are other commercial and other activities at the site. It is possible that a new museum or heritage centre could be located at Kirkby Stephen East if suitable premises could be found.

5.9 Cemetery Chapel

- 5.9.1 The Cemetery Chapel is a late nineteenth century chapel that is located in Kirkby Stephen cemetery. It is owned by the Kirkby Stephen Burial Board Joint Committee who are prepared to make it available for a museum free of charge. It is currently divided into two sections: One is used for storing furniture and includes a disused kitchen. The other is used for storing grounds maintenance equipment. If a museum were located here its location would provide a link with church history, family history and themes connected to notable graves and memorials. However, the location is some distance from the town and the building has neither toilets nor a car park. The Burial Board Joint Committee have said they would be willing to instal toilets and a car park but this would obviously need to be funded.

5.10 New Build

- 5.10.1 Another option may be to construct a new building to house the museum / heritage centre or to lease a building on a development such as an industrial estate.

6. **Exhibits and Displays**

6.1 Introduction

- 6.1.1 The Museum / Heritage Centre could include:
- Information
 - Artefacts
 - Reproductions

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- Temporary exhibitions

6.2 Information

- 6.2.1 The museum could have a series of information boards describing the history of Kirkby Stephen and the Upper Eden. Information could also be provided digitally, for example through a video that could be watched by visitors.
- 6.2.2 Work is already ongoing on notice boards for the church, and their content is being considered by representatives of the church, Upper Eden History Society and others. It is suggested that there should be ten boards covering the following subjects, although this may be subject to change. These boards, or similar, could be included in the museum:
- Where are we? The setting and the early years of Upper Eden.
 - Romans, Legends and Heroes in Upper Eden.
 - The founding of Kirkby Stephen.
 - The Normans arrive.
 - A peaceful backwater.
 - War, pestilence and plague.
 - Religious turmoil, repression and the rise of Lord Wharton.
 - Tension in the valley: The era of Lady Anne Clifford.
 - Towards prosperity: Wool and trade.
 - Kirkby Stephen people and where to visit.
- 6.2.3 The museum / heritage centre would also signpost visitors to places of natural beauty, historic sites, tourist destinations and service centres in Kirkby Stephen and the Upper Eden.

6.3 Artefacts

- 6.3.1 As there has never been a museum in Kirkby Stephen, there has never been a tradition of collecting artefacts from Upper Eden in a public collection. Artefacts from the area that are held in public collections are therefore found in several museums, and it is believed that many artefacts may be held in private collections that are not accessible to the public. There may be an opportunity to bring together artefacts from several sources.
- 6.3.2 Some publicly owned museum artefacts are held in the Penrith & Eden Museum in Penrith. This museum is owned by the local authority. Other artefacts are held in the Tullie House Museum in Carlisle that is owned by a Trust; or in museums in Kendal. It is possible that these museums would give permission for artefacts from Kirkby Stephen and the Upper Eden to be displayed in a museum in Kirkby Stephen if it could be demonstrated that they would be kept safely.
- 6.3.3 The display of historic stones in the church is currently open without attendance and existing ideas for further displays in the north or south aisle would be similar. The existing displays of stones in the church were funded by local donation. If the museum was located in the church the artefacts that are already in the care of the church would be at the core of the display. If it was not, I would expect the historic stones and other artefacts to remain in the church although they would be referenced in the museum or heritage centre.

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Some of the Medieval Sculpture currently on display in the church

6.3.4 Following the publication of my letter in the 'Cumberland & Westmorland Herald' I was approached by several people who offered to lend artefacts. These principally related to the history of local agriculture that would be an appropriate subject. The Upper Eden History Society also has a significant archive although this mainly includes secondary documents. It is likely that several appropriate artefacts may be owned by local individuals or organisations who may be prepared to lend or donate them to the museum.

6.4 Reproductions

6.4.1 Museums often make use of reproductions. This can be to create a 'scene' that gives context to a 'story' or an artefact that the museum is presenting. Reproductions can also be used to show people what an important local artefact that is not on display looks like. For example, the Crosby Garrett Roman Cavalry helmet is one of the most important artefacts of the Roman period to be found in the Upper Eden, yet it belongs to a private collector and is not on display. A reproduction may therefore be an appropriate part of a display of the Roman heritage of the Upper Eden.

6.4.2 The photograph below shows reproductions being used to aid the display at Appleby Castle:



Appleby Castle

6.4.3 One local person owns reproductions of medieval domestic items, arms and armour that they would be prepared to lend the museum. There may be others who own reproductions that they would be prepared to lend.

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6.5 Temporary exhibitions and Events

- 6.5.1 In addition to permanent displays, museums need to have temporary exhibitions and events. These provide regular visitors with something new to see, attract additional visitors who may be more interested in the temporary exhibition than the permanent displays, and allow local people and organisations to put on relevant displays.

7. **Outreach in the Community**

- 7.1 The museum or heritage centre would be a community asset. This means that, in addition to displaying artefacts, information and reproductions; it would reach out to the community. It would do this by:

- Working in partnership with existing community groups such as the Upper Eden History Society.
- Working in partnership with the local schools to support them in delivering the history curriculum, other relevant parts of the curriculum and extracurricular activities. The museum could provide a venue for the schools to use for schools art exhibitions, drama activities and community based educational outreach work.

- 7.2 In a Museum, a significant level of creative and intellectual activity will usually take place behind the scenes. Therefore things happen with which the community can get involved. At the same time the museum should inspire and enthuse others to their own self-activity. The intention is that the community would take the museum to its heart, adopt it as 'de facto' community property, and see it as something to be proud of and to be defended. Functions such as guided tours, research, outreach lectures, technical support for exhibitions and collections management would be provided by volunteers, building on work that is already done in these areas by local voluntary organisations.

8. **Arts Council Museum Accreditation Scheme**

- 8.1 It would be advantageous for the Museum to join the Arts Council's Museum Accreditation scheme. Museum Accreditation tells everyone involved with a museum that they're doing the right things to run it properly. At its heart, it answers one simple question: how do you show that your museum is well run?

- 8.2 Museum Accreditation is the benchmark for a well-run museum. The award:

- Shows a museum is being properly managed and governed – and other museums recognise that
- Demonstrates a museum's professionalism – which makes it easier to get funding and helps give confidence to lenders and donors
- Means a museum is looking after their collections and managing them appropriately
- Helps museums meet their users' needs
- Shows the museum team that they're working to an industry-wide standard.
- Gives access to professional advice and support, including mentors and Museum Development in England
- Helps keep museums on track by giving them ways to formalise plans, policies and procedures and so improve services
- Helps museums to meet their visitors' and users' needs
- Can boost museums' reputations, win funding and give confidence to donors and other supporters
- Helps museums manage their collections fairly, ethically and legally
- Gives museums a set of minimum requirements they have to meet, which include accountability and performance management/monitoring progress

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- Opens up opportunities for museums, including funding opportunities and new partnerships
- Helps museums audit their collections, and assess risks to them
- Lets people know that anything they donate to a collection will be accessible to the public and will be looked after ethically
- Shows a museum looks after its collections properly and safeguards them for the future
- Helps museums understand what their users and visitors want and make plans for the future

8.3 This matters because:

- It reassures museums that they meet the national standard – they're well run and taking the right steps to meet their visitors' and users' needs.
- It means people can actually access collections and stories – seeing the items that matter to them and knowing that future generations will be able to do the same.
- Working for a well-run museum helps staff and volunteers concentrate on what really matters.

9. Market Research

9.1 STEAM research carried out by Visit Eden in 2021 found that:

- In 2021 there were 4.21million tourism visits to Eden.
- Between them, these visitors brought in £352.4million to Eden's economy, an average spend of £84 per visitor.
- Tourism provided employment for 4,178 full time equivalent (FTE) posts

9.2 A local organisation commissioned a major market research project to determine if there is a market for a visitor proposition in southeast Cumbria. The research provided a base of evidence that was conclusively positive for a destination visitor experience. Kirkby Stephen has an excellent location for this. The Eden district has many visitors a year - most of whom are day trippers - with nowhere to anchor them.

9.3 According to government road statistics, the area around Kirkby Stephen has the following annual traffic: M6 exit to A685 – 3million; A66 from west (recorded just before Brough) – 5.7million; A66 from east (recorded just before Brough) – 3.2million; the A685 south of Kirkby Stephen – 2.4million. The coast to coast walk, that passes through Kirkby Stephen, attracts some 7,000 people a year. According to the Settle-Carlisle railway development company, they enjoy approximately 750,000 passengers annually. The market research project considered that it would be possible to attract 33% of these visitors to visit, stay and spend. Taking just the rail traffic and the A685 traffic this offers 94,000 as a core target market to build towards.

9.4 My own calculation estimates a slightly lower potential market as follows.

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- 9.5 British overnight visitors could be expected to be the largest group to visit the museum. The following table shows the annual number of overnight visitors in areas surrounding Kirkby Stephen and estimates the potential market for a Kirkby Stephen museum or heritage centre:

	Visitors ,000s	% to be attracted	Potential market ,000s
Allerdale	945	20%	189
Barrow	450	15%	68
Carlisle	765	20%	153
Copeland	450	15%	68
Eden	495	50%	247
South Lakeland	1,350	15%	203
Cleveland	600	10%	60
Durham	900	10%	90
Lancashire	600	10%	60
North Yorkshire	4,600	10%	460
Northumberland	1,000	1%	10
Tyne & Wear	1,900	5%	95
Total			1,703

- 9.6 Overseas overnight visitors could be expected to be about 7.5% of the British total, giving a potential market of 128,000 people within the total of 1,703,000.
- 9.7 The day visit market is often considered to include those who reside within an hour's drive of the destination. The following districts are within an hour of Kirkby Stephen giving a potential market of 827,000 people:

District	Travelling time	Population ,000
Carlisle	59 minutes	108
Darlington	49 minutes	106
Eden	35 minutes	53
Hambleton	58 minutes	87
Lancaster	59 minutes	143
Richmondshire	37 minutes	50
Sedgefield	59 minutes	87
South Lakeland	37 minutes	104
Teesdale	26 minutes	24
Wear Valley	57 minutes	65
Total		827

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- 9.8 The total potential market and projected visitor numbers could therefore be considered to be:

	Total ,000	Penetration %	Projection
British Overnight Visitors	1,703	1.0%	17,030
Overseas Overnight Visitors	128	0.5%	640
Day Visitors	827	1.5%	12,410
Educational visits	7	2.0%	140
Coach tours	23	20.0%	4,600
Railway excursions	8	10.0%	800
Total			<u>35,620</u>

- 9.9 A recent study found that average visitor expenditure per head at British tourist attractions was about £9. This included £4 in admissions, £3 in retail, £1.50 in catering and £0.50 in donations and other income. If a Kirkby Stephen museum could attract 35,620 visitors a year and average expenditure per head was £9, that would create a revenue of £320,000.

- 9.10 A budget for the Kirkby Stephen Heritage Centre or Museum could therefore be as follows:

	£,000	£,000
Admissions	142	
Retail	107	
Catering	53	
Other	18	
Income		320
Staffing Costs	142	
Buildings & Services	43	
Operations	57	
Cost of Goods Sold	82	
Expenditure		324
Deficit		4

- 9.11 The museum would also need to cover any capital financing costs that arise from borrowing to fund the initial investment (purchase of property if necessary, and equipment) and a budget for acquisitions. A small revenue deficit could therefore be expected especially in the initial years.

- 9.12 Financial information regarding other museums is included in Appendix A.

10. Grant Funding

- 10.1 There are several potential sources of grant funding of which the National Heritage Fund is probably the best known.

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- 10.2 The National Heritage Fund funds a broad range of projects that connect people and communities to Britain's heritage. They don't define heritage. They ask applicants to tell them what they think is important and should be preserved, saying that:

"From historic buildings, our industrial legacy and the natural environment, to collections, traditions, stories and more – heritage can be anything from the past that you value and want to pass on to future generations."

- 10.3 A heritage project could include the following elements that could be included in a Kirkby Stephen museum or heritage centre:

- Oral history recordings of people's stories, memories and songs, as a way of communicating and revealing the past.
- Cultural traditions exploring the history of different cultures through storytelling, or things that you do as part of your community. This could be anything from dance and theatre to food or clothing. It could also include the heritage of languages and dialects.
- Community archaeology involving the active participation of volunteers in archaeological activities, everything from investigating, photographing, surveying, excavation and finds processing. Sometimes called public archaeology.
- Historic buildings, monuments and the historic environment – from houses and mills to caves and gardens. Areas that are connected to history and heritage.
- Museums, libraries and archives – making the collections that museums, libraries and archives hold more accessible through new displays, improving public buildings and galleries, or engaging people with interpreting new and existing collections.
- Acquiring new objects – helping towards the cost of acquiring one-off objects or collections as part of a collections development policy.
- Commemorations and celebrations – telling the stories and histories of people, communities, places or events related to specific times and dates.

- 10.4 Heritage funding can be used for:

- Activities: to engage the wider community in heritage. They might include guided heritage walks, sharing oral histories or workshops. Activities should link to the heritage focus of the project and be tailored to the needs of the people the applicant wants to work with.
- Repairs and conservation.
- Digital outputs: this could be digital images, sound files or data, a website with heritage material, an app, or a film made using digital technology.
- New staff posts: this could include part of a current employee's role, if they were dedicating a specific amount of time to the project.
- Paid training placements: this could also include training for existing staff, to support the aims of the project.
- Professional fees: includes anyone related to your project in a professional capacity, from architects and heritage professionals to teaching staff.

- 10.5 Heritage funding cannot be spent on:

- Existing staff posts or organisational costs: unless calculated through 'Full Cost Recovery' that means securing funding for all costs involved in running a project. So an applicant can request funding for direct project costs and also for part of their organisation's overheads.
- Legal and / or statutory responsibilities: including anything that would be paid for regardless, whether the project went ahead or not. For example, rent, utilities, building maintenance, unless the applicant has a Heritage Enterprise grant.
- Promoting the causes or beliefs of political or faith organisations.
- Recoverable VAT.

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- Costs for any activity that has taken place before a grant is awarded.
- 10.6 To support the sector in its continued recovery from the coronavirus (COVID-19) pandemic, and through the cost of living crisis, the Heritage Lottery is prioritising heritage projects that:
- Promote inclusion and involve a wider range of people (a mandatory outcome)
 - Boost the local economy
 - Encourage skills development and job creation
 - Support wellbeing
 - Create better places to live, work and visit
 - Improve the resilience of organisations working in heritage
- 10.7 Projects must achieve at least the inclusion outcome. In addition to the outcomes, all projects must also consider long-term environmental sustainability.
- 10.8 Heritage Lottery Funding is very competitive. They are focusing on heritage, that would clearly include a museum or heritage centre, but it must be backed up with outreach potential. Encounter Eden and the Northern Viaducts Trust have already decided to target Teesside as an under-privileged (semi local) area with a large ethnic population that might benefit from experiencing Kirkby Stephen's local heritage. Teesside is top priority for 'levelling-up funding' while Eden is not considered by government to be deprived.
- 10.9 Funding could be sought from other sources including central government (UK shared prosperity fund, Borderlands programme or 'levelling up' funding), Westmorland & Furness Council and the National Park Authority. Westmorland & Furness Council have earmarked £285,000 for schemes in Kirkby Stephen Town Centre and this could potentially be used to provide some capital funding.

11. Potential Structures

- 11.1 It may be appropriate to establish a Trust or Community Interest Company to run the Museum / Heritage Centre. Some of the trustees or board members could be nominees of stakeholder public or voluntary bodies. To avoid trading risks, the collections could be vested in a separate collections trust. A 'friends' organisation could recruit and manage locally based volunteers.
- 11.2 Operational management could be the responsibility of an experienced, able and highly motivated curator / manager, perhaps supported by a marketing and administration officer with a commercial background. Other staff could handle museum activities including temporary exhibitions and events.

12. Next Steps

- 12.1 The following next steps are suggested:
- Establishment of a committee to develop the project with the intention that it would eventually become a Trust or Community Interest Company that would own and manage the museum / heritage centre.
 - Consultation with local stakeholders and potential funders around the proposals contained in this business case.
 - Decisions on the location and making appropriate arrangements with the current owner.
 - Decisions on the organisational framework within which to progress the project.
 - A funding feasibility study, if need be, modifying the project to match criteria and / or resources of funders and to identify application requirements.

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- Negotiations to secure appropriate exhibits and other agreements with potential partners.

Adrian Waite
January 2024

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Appendix A – Financial information regarding existing Museums

The Tullie House Museum and Art Gallery Trust in Carlisle is a company limited by guarantee and has reported the following income and expenditure:

	2021/22 £,000	2020/21 £,000
Donations & Legacies	855 Cr	1,172 Cr
Charitable Activities	1,215 Cr	1,078 Cr
Other trading activities	146 Cr	60 Cr
Investment income	6 Cr	7 Cr
Other income	<u>50 Cr</u>	<u>261 Cr</u>
Income	2,273 Cr	2,578 Cr
 Raising funds	 177	 110
Charitable activities	<u>2,278</u>	<u>1,604</u>
Expenditure	2,455	1,714
 Net expenditure / income	 182	 864 Cr
 Exhibitions tax relief	 36 Cr	 85 Cr
 Net movement in funds	 147	 949 Cr
 Funds brought forward	 <u>2,064 Cr</u>	 <u>1,115 Cr</u>
Funds carried forward	<u>1,917 Cr</u>	<u>2,064 Cr</u>

Their balance sheet is reported as follows:

	2021/22 £,000	2020/21 £,000
Tangible Assets	621	711
Investments	<u>303</u>	<u>303</u>
Fixed Assets	924	1,014
 Stocks	 12	 13
Debtors	417	348
Cash	<u>936</u>	<u>1,044</u>
Current Assets	1,365	1,406
 Creditors	 372 Cr	 355 Cr
 Net Current Assets	 993	 1,050
 Net Assets	 1,917	 2,064
 Represented by:		
Restricted funds	628 Cr	733 Cr
Unrestricted funds	<u>1,289 Cr</u>	<u>1,331 Cr</u>
Total	1,917 Cr	2,064 Cr

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In 2021 the trust completed phase one of 'Project Tullie', a capital development programme based on a 2019 master plan. the new galleries were funded by grants from the DCMS / Wolfson Museum & Galleries Improvement Fund, the Cumbria LEP Northern Powerhouse Growth Fund, the Garfield Weston Foundation and through the generosity of a private donation from a local Cumbrian family.

Expenditure and income at the Penrith & Eden Museum in 2019/20¹ was as follows:

	£
Staff & Overheads	41,160
Premises related expenses	22,740
Supplies & Services	15,070
Recharges	2,460
Capital Charges	<u>1,880</u>
Gross Expenditure	83,110
Contributions	<u>1,000</u> –
Net Expenditure	<u>82,110</u>

The budget for the Kendal Museum in 2022/23 was £2,600 for premises and £47,300 for supplies and services, a total of £49,900.

¹ Original Estimate.