

GUIDE TO MANAGING HISTORICAL SOCIETIES

Managing the Organisation

The Building

Most historical societies have a building in which they can hold meetings, keep their collection and make the collection available to the public. There are many arrangements by which local societies occupy their premises, from full ownership, through Committee of Management for properties owned by the Crown, peppercorn rentals, some owned by the Department of Sustainability and Environment and others by local councils and other organisations.

Frequently historical societies occupy a building of historical significance to the local community. The building may, for example, have previously been a courthouse, a farmhouse, a mechanics institute, a bank or a post office. These buildings can pose challenges when they are to be used for the safe storage and display of collections. Occupants of heritage buildings may discover that there are restrictions on the use of the building, especially if plans to alter the building are made.

Some historical societies occupy buildings built specifically for housing collections.

Heritage buildings can be viewed as an artefact in its own right as well as accommodation for the historical society.

Societies with collections may use one building for storing and displaying the collection but hold meetings in another building. Some premises are large enough to allow the society to undertake the various functions of the group in one building.

Before accepting the use of a building it is important to consider the costs of maintaining the building and making it suitable for collections.

Monitor the written contract you take with the property owner if you do not own your property, and read the contract very carefully whenever it is renewed.

Leasing

If societies don't own the property outright, they need to ensure that they have a lease and understand the terms, such as the duration, and all arrangements and obligations according to which they occupy the building.

A lease should be a summary of the agreed, contracted terms between landlord and tenant, and as such should contain no unpleasant surprises for either party, but rather should have the willing concurrence of both parties. However, a lease is a major and enduring commitment of the organization and its people, and once entered into, can be difficult to get out of without penalty, even if only to the group's reputation.

Paperwork should be organised, and checked by the Committee of Management. The landlord prepares a lease agreement - a document detailing the terms being offered.

The society is not obliged to accept the terms in their entirety, or necessarily at all. If the society has access to legal counsel, advice should be sought regarding any particular reservations that the society might have, or changes that the society might desire to those terms, before anything is signed.

If the lease is a rental agreement, it should not be signed unless it contains a clear and unequivocal statement of the amount that will be due as rent. It is advisable not to commit to occupying the premises until they have been certified as fitting the requirements of the society. This includes not only make-good work to bring the premises to a serviceable (and thus tenantable) condition, but might also include matters such as heating and air-conditioning, utilities, plumbing, fire protection etc. Mowing of grass and maintenance of buildings and grounds are common issues, as is adapting historic buildings to the archiving of heritage collections. Beyond the suburban area, it probably also includes septic treatment, which may not comply with current requirements in its present form, and could be very expensive to bring up to contemporary standards.

Heritage buildings have special considerations. Some issues affecting the potential use of the building may conflict with Heritage Victoria's expectations concerning the building. Their major preoccupation, once the building's future is secured, will be the most sympathetic observation of its original purpose. This gives the group some degree of leverage over other contenders who might hope to use the property for their own ends. Ensure that that aims for the site comply with its permitted use.

These considerations are all critical for expenditure of resources, application for grants, and for future planning.

Interpretation of the building

The building itself creates exciting opportunities for understanding the history of the local area, and for displaying the collection. It is also an exciting environment to attract visitors. If the building has a story of its own, this may determine how the collection is displayed. For example, a courthouse may be retained as a working institution, complete with dummies of jury and court officials, with an audio-taped court case researched from newspapers, which visitors can self-activate.

Space in the building should be allocated for frequent replacement and turnover of static displays.

Some good examples of period buildings being used for heritage displays in eastern Victoria include the Yarram, Omeo and Healesville courthouses, the Port Albert Maritime Museum and the South Gippsland Historical Society Museum in Foster. In western Victoria, an example is the Customs Building at Portland. Visiting the premises of other societies is a good way to see what is possible, to share experiences and establish valuable contacts.

Be aware that 21st-century volunteers may choose not to work in 19th-century conditions. In older buildings there may be the need for sensitivity in reconciling the needs of volunteers with the requirements of Heritage Victoria and the practical capabilities (and costs) of architects, builders, plumbers and electricians.

Signage

It is of great advantage to your society to arrange to have prominent, attractive signs highlighting the opening hours, entry fee, and current exhibitions and activities in the society's building. Often there are legalities with signage and it is advisable to check before investing any resources into the creation of the signs. Work with your local council's bylaws group, and in particular ask what their requirements might be (and whether or not they are at all negotiable if they don't seem to be altogether suitable). Local councils can order the removal of unauthorised signage.

Grants may be available specifically for the purposes of establishing or refreshing signage reflecting some sympathy for the heritage nature of the target of the signs.

Promotion within the heritage and tourism communities and through related publications are also equally vital to ensuring a steady stream of visitors. "If you build it, they won't come" -- unless they know it's there.

Security

1. Security of building – fire, smoke and burglar alarms must be checked regularly. These may be required as a condition for insurance; if not, their presence could conceivably entitle the society to a premium reduction and should therefore be brought to the insurer's attention.
2. Door and window locks must be secure and locking/unlocking procedures established.
3. Establish orderly protocols about housing of keys; keep a key register. In small and/or remote communities, this will in any case be a necessary part of civil disaster preparedness. Do not label keys held by committee members, in case of theft of such keys.

Occupational, Health and Safety operating procedures could be attended to by appointing a committee member as Safety Officer.

Emergency and evacuation procedures must be established and recorded in the procedure manual, including:

- Emergency contact numbers
- First aid policy and location of first aid kit
- Opening and closing of premises procedure
- Incident procedure

Ensure that the society adheres to all codes of practice for fire safety. The fire evacuation procedure requires that you have clearly marked fire exits.

Building maintenance

Establish just who is responsible for the maintenance of the building. For example, if there are white ants in the floor who will pay the repair costs? Another example might be to establish who bears the responsibility of blocked drains.

In the interests of more accurately targeting working bees that the group might organize, ask the membership, when seeking annual subscriptions, what skills if any they might be able to offer, and if possible, outline the group's likely areas of particular interest in the forthcoming year. Sometimes, members will have compliant friends who can provide expertise in areas of need that are otherwise not directly available.

If the society is responsible for the maintenance of the building, establish and maintain a register of local tradespeople that the group has used and would be prepared to use again. A substantial amount of the budget may have to be applied for maintenance, including cyclic painting internally and externally. If initial renovation is required in order to make the property occupiable, beware of all costs associated with the project for which the society may be accountable.

A necessary part of the evaluation of any lease offered to the society (*see above*) should be the preparation of a simple spreadsheet projecting at least as far ahead as the financial commitment does -- and this might be anywhere from 20 to 35 years for a substantial property -- that includes a generous allowance for periodic painting and other maintenance, as well as any occupancy costs such as building renovation to occupiable standards which your landlord might seek to recover from you, rates, utilities, insurance, etc.

Keep in mind that activated equipment, such as audio-visual displays, requires regular monitoring and maintenance. A point that is also worth bearing in mind is that no building older than perhaps 20 years (and many much younger) ever has enough power points, so unless an early part of the restoration is extensive *and adequate* electrical work provided, you will need to put in place daily protocols to deal with (firstly, *evaluating* and secondly) turning on and off the usual array of piggy-backed power-boards and double-adapters driving all the office equipment, displays, computers, and the incidental electrical items that your volunteers might provide for their own comfort.

A society member should be allocated the job of general maintenance and a regular place on your committee's normal meeting agenda. A maintenance schedule can be drawn up by the Management Committee, and a forward schedule of works prepared. This is useful if the society should suddenly be offered resources or funding. Such a schedule should include, as a minimum, the location of the work, an indication of whether it's interior or external work, detailed work requirements including special tools required, things to buy or bring and an identified co-ordinator for the job, as soon as one can be assigned.

A roster of regular cleaning, grass mowing, garden and general maintenance should also be established.

Keep a dated record of any works completed on the building and grounds.