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# Working with freelancers

A guide to help museums recruit, brief and work with freelancers

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# 1. Introduction

This guide has been written to support museums in finding, appointing, briefing and working with freelancers and consultants, to help them to get the best out of the relationship.

## 2. Definitions

The terms 'freelancer' and 'consultant' are often used interchangeably by those individuals and organisations that appoint them and there can be some confusion between the two.

A freelancer can be defined as someone who "is not employed by one organisation, but is paid for each piece of work they do by the organisation they do it for" and a consultant is "a person who gives expert advice to a person or organisation on a particular subject"<sup>1</sup>.

For the purposes of this document, 'freelancer' will cover both: the document talks about individuals appointed by museums for a particular, temporary project.

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<sup>1</sup> [www.collinsdictionary.com](http://www.collinsdictionary.com)

### 3. What freelancers do

Freelancers undertake a huge variety of work with and for museums, for example:

- Acting as a critical friend / mentor
- Business planning and options appraisals
- Collections management
- Community development and delivery
- Conservation advice
- Conservation management plans
- Copyright consultancy
- Creating and delivering events
- Creating audience development plans
- Creating marketing strategies and delivering marketing campaigns
- Developing and writing Heritage Lottery Fund (HLF) activity plans and bids
- Developing education resources
- Developing exhibitions
- Delivering learning activities
- Developing learning strategies
- Evaluating projects
- Fundraising and income generation consultancy
- Graphic design
- Illustration
- Interpretation plans
- Project management, often for Heritage Lottery Fund, Arts Council England (ACE) or other funded projects
- Photography
- Running training
- Trustee development
- Undertaking visitor and non-user research and consultation
- Website development
- Workshop facilitation

## 4. Benefits of working with freelancers

1. Freelancers offer **flexibility**, allowing you to bring in an additional resource and expertise when and where it is needed, often at fairly short notice.
2. Freelancers can provide a particular **expertise, experience or skillset** that you, your department or your organisation lacks.
3. Freelancers can be **an extra pair of hands** if you lack time.
4. Freelancers can have a diverse set of experience that allows them to **bring ideas and lessons learned on other projects** to your museum. This may be specialist and niche experience that your organisation lacks, or broader, for example from working across different sectors, such as libraries, archives, tourism, charity and heritage.
5. Freelancers are often **entrepreneurial, resilient and creative thinkers**, with a range of skills honed by taking responsibility for all aspects of their businesses.
6. Freelancers bring an **unbiased and independent perspective** from someone outside the organisation.
7. Freelancers can provide **innovative thinking**, a fresh pair of eyes and a new take or different approach.

## 5. Freelancer or agency?

Before you commission work, consider whether the work is suitable for a freelancer or an agency (for example a design agency or website development agency), or whether you are happy to open it up to both.

### Key advantages of independent consultants and freelancers:

- They will be a continuous point of contact for you;
- What you see is what you get – the person pitching to you will also deliver the work;
- They work for themselves, so are likely to be very motivated about delivering and providing excellent results, since their reputation and referrals will mean a lot to them;
- They are likely to have lower overheads than agencies and may have lower day rates.

### On the flipside, key advantages of agencies are:

- They will have a team of people who can contribute a range of ideas into their work for you (just make sure you establish *who* will be delivering the work);
- They may have access to tools and resources that freelance professionals do not;
- They should always be able to provide cover, even when key staff are ill or on leave.

Consider the scale and scope of your project, what it is you need and what aspects are most important to you. Make sure that you ask questions in the tendering process to ease any concerns you may have (e.g. how will any upcoming holidays affect your timescales, who exactly will work on your project?).

Many freelancers have networks of other freelancers they work with and can put together **virtual teams** to work together on projects. This can give them the same scale and breadth as an agency. If this is something you are open to, make this clear in your brief.

### Key advantages of this are:

- They can assemble a team that is tailored to your project's needs;
- You will get the benefit of a range of expertise and input;
- There won't be the overhead costs of a traditional agency.

### But make sure you consider and establish:

- Who will be the lead contact for you to liaise with?
- What are the different roles each of the freelancers will have?
- Who needs to sign the contract?
- How will payment work – will one freelancer invoice for all or will they invoice individually?
- What insurance do the team members involved have?
- Who will be responsible if something goes wrong?

## 6. Is the work a freelance opportunity?

This might seem obvious, but before you promote any freelance opportunities, make sure that they *truly* are freelance opportunities. Freelance contracts should not be used as a way to provide fewer rights to an employee or to save money on a role that should be classified as an employed position – and it is illegal to do so.

There is an [online quiz](#) that freelancers and museums (as clients / employers) can take to check whether a piece of work is appropriate for a freelance contract.

The following guidance is from [the Government](#) (as of June 2018):

“A person is self-employed if they run their business for themselves and take responsibility for its success or failure.”

“Self-employed workers aren’t paid through PAYE, and they don’t have the employment rights and responsibilities of employees.”

### Checking if they’re exempt from PAYE

“Someone is probably self-employed and shouldn’t be paid through PAYE if most of the following are true:

- they’re in business for themselves, are responsible for the success or failure of their business and can make a loss or a profit
- they can decide what work they do and when, where or how to do it
- they can hire someone else to do the work
- they’re responsible for fixing any unsatisfactory work in their own time
- their employer agrees a fixed price for their work - it doesn’t depend on how long the job takes to finish
- they use their own money to buy business assets, cover running costs, and provide tools and equipment for their work
- they can work for more than one client.”

### Checking their employment rights

“Someone is probably self-employed and doesn’t have the rights of an employee if they’re exempt from PAYE and most of the following are also true:

- they put in bids or give quotes to get work
- they’re not under direct supervision when working
- they submit invoices for the work they’ve done
- they’re responsible for paying their own National Insurance and tax
- they don’t get holiday or sick pay when they’re not working
- they operate under a contract (sometimes known as a ‘contract for services’ or ‘consultancy agreement’) that uses terms like ‘self-employed’, ‘consultant’ or an ‘independent contractor’.”

## 7. Finding a freelancer

There is no single comprehensive register where you can find a list of all freelancers in the UK, but you can use several avenues, depending on the type of work you need doing.

As there is no single option that reaches all freelancers, try to use several methods in order to reach as many freelancers as possible, and to increase the quantity and diversity of freelancers who can apply.

### a) Put your freelancing job on job sites and e-newsletters

#### Free sites include:

- University of Leicester Museums Studies [Jobs Desk](#)
- Arts Council England [jobs site](#)
- The Visitor Studies Group [JISCMail](#)
- The Museums Computer Group [JISCMail](#)
- The Archives-NRA [JISCMail](#) list (aimed at archivists, conservators and records managers)
- The regional Museum Development Organisations' websites and/or e-newsletters:
  - [SHARE Museums East](#)
  - [South East Museums](#)
  - [South West Museum Development Programme](#)
  - [London Museum Development](#)
  - [West Midlands Museum Development](#)
  - [Museum Development East Midlands](#)
  - [Museum Development North East](#)
  - [Museum Development North West](#)
  - [York Museums Trust](#)
  - [Museums Galleries Scotland](#)
  - [Welsh Museums, Archives and Libraries Division](#)
  - [Northern Ireland Museums Council](#)
- You can send ads to the [www.arts-consultants.org.uk](http://www.arts-consultants.org.uk) website for free, but they will only go out to the site's members.

#### Paid-for opportunities include:

- [Museums Association](#):
- GEM's e-Bulletin, [website](#), monthly e-News
- [Arts Marketing Association](#)

### b) Museum Freelance Network

The Museum Freelance Network is a volunteer-run network which connects, supports and champions freelancers working with museums, heritage sites, galleries and archives. It runs an annual conference and an e-newsletter and is also starting to organise regional meet-ups and training courses. The organisers will circulate your job to its network of freelancers in its e-newsletter, LinkedIn group (over 600 freelancers) and to Twitter followers free of charge if you contact @museumfreelance on Twitter or email [comms@christinalister.co.uk](mailto:comms@christinalister.co.uk).

## c) Recommendations

Ask other museums, Museum Development Officers, your regional Museum Development Organisation (SHARE Museums East), project funders (for example HLF monitors) or freelancers you already know if they can recommend anyone who does the type of work you are after.

## d) Directories

There are several sites that list freelancers and agencies which you can search through, but be aware that they are not exhaustive lists and those suppliers have often paid to be listed:

- Museums Association's [Find a Supplier](#)
- Museums Association's Museum Services Directory (printed every April and delivered to members)
- Association of Independent Museums (AIM) [Suppliers Directory](#). (see also the AIM Directory in the back of AIM's newsletters)
- Arts Marketing Association's [freelancer directory](#)
- GEM's [list of suppliers](#)
- [Visitor Studies Group](#)
- Arts Professional's [Arts Services Directory](#)
- Arts Consultants' [directory](#)

## e) Share as much as you can

As well as sharing with your existing followers and supporters (for example on Twitter, LinkedIn, your website, with trustees, staff and volunteers and any existing freelancers), ask your networks and stakeholders to share the job – for example can it go on Museum Development Officers' e-newsletters?

## f) Procurement portals

Local authority museums may have to – or can choose to – use an online procurement portal. Whilst these help to provide a framework for your procurement and may be useful for large and complex projects, many freelancers are put off by them due to the often onerous paperwork and administration requirements. For the East of England these include:

- Bedfordshire:
  - [Bedford Borough Council](#)
  - [Central Bedfordshire Council](#)
  - [Luton Borough Council](#)
- Cambridgeshire:
  - [Cambridgeshire County Council](#)
  - [Peterborough City Council](#)
- Essex:
  - [Essex County Council iSupplier Portal](#)
- [PAE, the Procurement Agency for Essex](#)
- Hertfordshire:
  - [Supply Hertfordshire](#)
- Norfolk:
  - [Norfolk County Council](#)
- Suffolk:
  - [Suffolk Sourcing](#)

## g) Online searches

It can also be worth using keywords to find freelancers in search engines and/or on LinkedIn. Look at the individuals' profiles to see if their experience might be a match, and send them the brief to see if they would like to respond.

## 8. Choosing and appointing a freelancer

Structure your commissioning process in a way that:

- allows you to identify who is a suitable candidate for the role;
- is fair and transparent;
- is appropriate for the size and scope of the project (for example, a very cumbersome tendering process and set of interviews for a one day role is unlikely to be worth a freelancer's investment in time – or that of your organisation either).

Ensure you comply with any funders' or local authority requirements if applicable. For example, the Heritage Lottery Fund specifies that for services costing more than £10,000, grantees must get at least three competitive tenders or quotes and show that they have selected the one that provides the best value for money (note that this is not necessarily the cheapest). Some local authorities also have similar requirements, which may affect local authority museums. If you have received funding from SHARE, you should get three quotes if the work is worth more than £1,000.

Please bear in mind that freelancers may spend several hours or days on developing proposals and responses to briefs. If you have already identified someone you wish to work with and do not intend to consider others seriously for the role, please do not ask freelancers to apply for the work, as it is unfair to ask them to waste their (unpaid) time on this.

Some freelancers will be happy to work with you to help shape and develop a brief, and getting help with identifying what support you need can be very beneficial. However, any expectations around this need to be clear: the freelancer needs to know upfront whether the brief will then be circulated widely. Consider paying for a couple of hours of a freelancer's time for this support – this can be a very worthwhile investment as you should end up with a better brief. If you have a big project, perhaps quite technical and it is something that your museum does not have extensive experience in, you could consider paying a freelancer for some time to help you with the whole procurement process, helping you to write a good brief and shortlist and/or interview candidates.

### What to look for

Think about what you really need, what skills or experience are *critical* and what may be *beneficial* but not essential. In some cases relevant experience will be key, for example with regards to complex or technical projects, but in other instances creative thinking and/or a positive can-do attitude and compatibility with the client may be equally or more important. You may feel that knowledge of and contacts within the local community will be critical and there would be a lot of on the ground work (i.e. someone local would be advisable), but in other instances geographic proximity may not be a deciding factor, and actually someone else may have valuable experience from delivering very similar projects elsewhere in the country.

### Experience from other sectors may also be relevant and beneficial, for example:

- Charity sector experience in fundraising;
- Tourism sector experience for marketing;
- Commercial and private sector experience for income generation projects.

### A good freelancer will:

- Listen to you, as well as provide input;
- Add demonstrable value to your organisation;

- Provide a bespoke and tailored service to you, rather than a standard one-size-fits-all approach;
- Strike the right balance between being part of your team and being an impartial outsider;
- Be a trusted partner, considerate to sensitive and confidential information;
- Take a weight off your mind, ease your workload and/or pressure;
- Deliver to your brief on time, providing that you also meet your commitments;
- Ultimately, provide a service of such quality that you would be happy and confident to recommend them to others.

## Additional considerations

### Insurance

Consider what levels of insurance you require. Up to £1 million is quite common for freelancers to have for public liability and for professional indemnity insurance. Don't ask for insurance that isn't actually needed (for example some work won't need public indemnity insurance and the self-employed won't need employers' liability insurance if working on their own), and don't ask for insurance levels that are not appropriate or proportionate to the work. Procurement portals and local authorities in particular often have standard levels that also cover building contracts, which are not needed for museum freelancers.

A good idea would be to could make clear the insurance levels you need, and specify that the successful freelancer could top up their insurance levels once appointed if needed, rather than expecting all applying freelancers to have higher levels at the application stage.

### GDPR compliance

Consider what sort of GDPR/data protection compliance you require of freelancers you work with, depending on what sort of personal data (if any) they will be accessing, processing or storing as part of the project. Naomi Korn from [Naomi Korn Associates](#) (a management consultancy specialising in copyright, licensing and data protection) recommends that museums should consider and check:

- How, why and where freelancers store personal data;
- How freelancers would seek consent (where relevant) for personal data collection, processing and storage;
- Whether freelancers encrypt their computers and mobile devices;
- How long freelancers keep personal data;
- What freelancers would do in the event of a data breach containing personal data, particularly in terms of notifying the museum within 24 hours.

This is likely to be of particular importance for some freelancers, such as those involved in audience and non-user research, marketing lists, and event bookings.

### References

Consider requesting the contact details of two referees (you might want to specify 'for relevant or similar work', and/or work done in the past two, three or five years), who you can contact before you appoint the candidate.

### Timescales

In some cases, short notice is unavoidable. But where possible, try to allow sufficient time in each of the stages of the commissioning process, as you will get the most and best quality responses and have a broader pool of people to choose from that way.

There might be some freelancers who would be available for the work itself but if there is not enough time to submit an application, may not be able to apply.

Larger projects often have several deadlines:

- One for expressions of interest
- One for submissions of questions (answers to which are circulated to everyone who has expressed an interest in the project)
- One for applications.

The benefit of asking for expressions of interest is that you will have an idea of the level of interest in your brief (if there are no replies, you can start reconsidering your options straight away), and you can also contact respondents with answers to questions that have been asked, to keep the playing field fair.

Downsides include more administration time for you; some freelancers may miss this earlier deadline; and not everyone who expresses an interest in the project will necessarily go on to submit a response to the brief.

### **Interviews**

Interviews can help you choose the most suitable candidate for the job and will be especially useful on bigger, longer or sensitive projects, and on projects where communication is important.

Consider having a panel of interviewers, that stays the same for each interview. Ensure the panel all understand and agree how the interviews will work, who will say what, and what are selection criteria.

Allowing 45 minutes per interview, and 15 minutes in between each interview for the panel, is normally sufficient. You might find it useful to ask candidates to prepare a short presentation and follow this with questions and answers, or simply to have questions and answers. Allow some time at the end for the freelancers to ask questions too.

Be clear and upfront about your timetable for the whole process, for example, if you are planning on conducting interviews with potential candidates, which day(s) or week would you like these to take place, so freelancers can try to keep these clear. Freelancers may well have their diaries fairly full, so some flexibility or a range of options for interviews will be helpful – if a freelancer has limited availability for the immediate upcoming weeks it is more likely to be because they have existing client commitments they need to honour, rather than a reflection of them not wanting to win your work.

<b>Example timescales for procurement for freelance projects</b>	
Brief available	Minimum 3 weeks before submission deadline, ideally 4-6 weeks before
Deadline for questions	1 week before submission deadline (if you plan to send out answers to all who have registered, if not, allow questions up to the deadline)
Submission deadline	Date X minus 2-6 weeks, depending on if you are running interviews or not
Notification of interviews if conducting	Asap – preferably 2 or more weeks before interviews
Interviews conducted if applicable	Date X minus 2-4 weeks
Referees contacted if applicable	Date X minus 2-3 weeks
Successful candidate notified	Date X minus 1-2 weeks
Unsuccessful candidates notified	Date X minus 1-2 weeks
Contract and terms to be agreed and signed	Date X minus 1 week
Work to commence	Date X

## **Notifying applicants**

Do notify successful and unsuccessful applicants as soon as possible, since whether or not they work with you will affect how much time they have for other work (or how much work they need to find).

*“The single biggest improvement clients could make to improve freelance lives is this: make much quicker decisions about who you're going to use for your project. The limbo time: ‘Have we won that work? Should we bid for other bits of work?’ is a killer.” (Consultant, June 2018)*

## 9. Writing a freelance brief

The quality of your brief and the timescales and budget you include are likely to impact significantly on which freelancers, and how many, respond.

A 'good' brief will:

- be clear what the work itself as well as the tendering process involves;
- 'sell' the work – make the work sound like an opportunity freelancers would want to go for;
- be clear about what you are looking for and any particular requirements.

If you feel the work would be appropriate to both individuals and agencies, make sure that your brief reflects this, as using language that focuses on 'agencies' and 'team members' may put individual freelancers off from applying.

If you are happy to consider applications from teams of freelancers, make this clear. Similarly, if there are elements of the brief that could be split up and you would be happy for people to apply for *a part* of the brief, make this clear too – for example, if you have a learning brief that covers strategy development and session delivery, would you consider applications from freelancers who just applied for one or the other?

Consider how much flexibility you have – for example, if you are clear on outcomes but flexible on how you get there, you can ask freelancers to specify a methodology or approach that will deliver those outcomes.

Remember that tight timescales will mean that some freelancers can't consider the work due to pre-existing commitments. Tight budgets may also mean some freelancers won't consider the work, or discourage freelancers from further afield from applying as the travel may not be worth their while.

### Whether to specify a budget or not

When it comes to the budget, you have two options:

#### a) Set a maximum budget or a range:

- Ask candidates to break down how they propose to use this budget, for example what can they deliver for this, and how; how many days' work at what day rate would this equate to; what would each phase of the project cost; what expenses would be incurred.
- **Advantages:** you will get responses that are relevant and appropriate to your budget and project, and you can see how each applicant would break down the budget.
- **Disadvantage:** all responses will be similar in price so applications may be harder to choose from.

#### b) Don't provide a budget, and ask freelancers to price the project:

- Ask candidates to propose a budget for undertaking the work you have requested. Only do this if you have *very* clear deliverables and expectations, so that freelancers have a good understanding of exactly what the work would entail and can price accordingly.
- **Advantages:** you are more likely to have a range of price points in the applications to choose from; the budgets should reflect what the freelancers feel the project would cost.
- **Disadvantages:** some proposals may be higher than your actual or feasible budget, which wastes time (yours and freelancers'); and unless the brief and deliverables are very clear, freelancers may interpret these differently, so you may not be able to compare like for like.

It is generally best to provide at least a ballpark budget or a budget range upfront, so that you get appropriate responses that are feasible for the project, and less time is wasted. You might otherwise find that all freelancers quote above your budget and you have to start again, or that you don't get as many freelancers applying.

## **Setting a budget**

If you are unsure of what sort of budget to allocate, consider contacting a couple of freelancers and asking for their advice – many freelancers will be happy to give you a ballpark idea for a particular project, not as a formal quote, but to give you a realistic steer for you to use for your brief. Just be upfront about your intentions, should you be planning on going out to competitive tender. Make sure this is permissible within any procurement rules that you are bound by (e.g. local authority / funder).

You can also contact other museums or heritage organisations that have run similar projects and ask them what these have cost, so you get an idea. If you are running a HLF or ACE-funded project, try asking your monitors there, as they may be able to give you a budget guide or point you in the direction of a similar project.

## An example brief

Heading	What to include
<b>Introduction</b>	Introduce the brief.
<b>About us</b>	Provide an overview of your organisation, staff and stakeholders involved and any other relevant context (for example if the work is part of a larger project, include information about that). Include your organisation's aims and objectives so the freelancer can see how the work fits with the bigger picture and how it will make a difference to your organisation.
<b>The opportunity / Project / Brief</b>	Explain what the work is about? Where did the need come from? How is the work funded (if funded from an external funder)
<b>Aims of the work</b>	Set out why you want this work to be done and what you want to achieve – how will this help your organisation?
<b>Key deliverables / outputs</b>	Set out the key deliverables or outputs for the work. Make these as SMART as possible (Specific, Measurable, Achievable, Relevant and Timebound). How will you know if they are met or not?
<b>Project timescales</b>	Set out timescales for the work – start, completion and any key milestones in between.
<b>Project budget and payment terms</b>	Either set out the budget available, or ask freelancers to provide a quote for undertaking the work.
<b>Monitoring, evaluation and reflection</b>	Set out how the project will be monitored as it progresses, what milestones there are and what the mechanism is for feeding back and tweaking things if needed. Set out how the project will be evaluated – how will you and the freelancer know if it has been successfully achieved? How can you incorporate some reflection at the end to identify any lessons for future projects?
<b>What we are looking for</b>	Set out any requirements for experience and skills and for any desirable experience and skills.
<b>References</b>	Decide whether you want to ask for referees and at what stage you would contact them.
<b>Contact details</b>	Provide a name, email and phone number for freelancers to contact with their questions and responses.
<b>Tendering process and timescales</b>	Give a detailed timeline including what the submission deadline is; details of when and where interviews will take place; when successful/unsuccessful candidates will be informed. Will you issue responses to all tenderers during the tender period to ensure all freelancers have access to the same information, or put Q&As on your website?
<b>Instructions for responding to the tender</b>	Specify any other requirements, for example: <ul style="list-style-type: none"> <li>• How do you want to receive responses? By email? Who to?</li> <li>• Do you want to limit submissions to a maximum number of pages?</li> <li>• Do you want to ask for CVs?</li> <li>• Do you want to ask for examples of previous work?</li> </ul>
<b>Contract award criteria</b>	Include what you are looking for and how you will evaluate submissions. Some tenders specify a weighted breakdown between, for example, the approach to the brief / methodology; value for money; and past experience.
<b>Requirements</b>	Make it clear that as a freelance / consultancy opportunity the person appointed will need to be responsible for their own National Insurance and tax. Also set out any requirements for GDPR compliance.

## 10. Paying a freelancer

### Budgets

Remember that when commissioning freelance work, you are paying for a service, not a commodity, so price should only be one of several factors that influence your decision about who to appoint. Consider value for money: does someone charging you a higher rate offer you additional value, and are you prepared to pay for that?

You might also want to include a contingency allowance which could be set aside for work that is not initially identified within the earmarked budget, but that might emerge as important as the project progresses.

If you have a very small budget, consider asking a freelancer how you can make the most of this. For example, the budget may not be enough for a freelancer to deliver your project fully, but perhaps they could deliver training to your staff and/or volunteers so that they in turn could then deliver the project (maybe with some ongoing mentoring from the freelancer), or they could act as a critical friend throughout the process – you get the benefit of their experience and input, in a time-efficient way.

### Day rates

The prices that freelancers charge can vary enormously, and may depend on a range of factors such as: experience, specialism, value provided, where they are based (London tends to have the highest day rates), costs associated with the project (equipment, travel expenses, materials and so on), the 'going rate', competition and demand for services, the length of the project, the complexity of the project and the project risk.

Some freelancers will work on a project fee, others use a day rate or hourly rate. Whilst it is hard to generalise and there is no comprehensive research on rates in the sector, common day rates for freelancers working with museums are £200-£500. Strategic, expert work and training delivery will often be £300-£500, and there are some freelancers who will charge less than £250 for some work. Responses to an online survey<sup>2</sup> carried out by consultant [Nicola Bell](#) in 2016 found that interpretation planning (£345), project evaluation (£328) and developing an activity plan (£320) had the highest mean average daily rates, while developing a learning programme (£255) had the lowest.

It is not fair or appropriate to take an employed annual salary and split it by the number of working days to give you an indication of a freelancer's day rate, as this does not take into account:

- the additional costs that freelancers incur, for example: business insurance, pension contributions, professional services such as accounting, IT equipment, subscription services and tools, office space, training, marketing;
- that freelancers cannot spend every working day on billable work as they will also need to spend time on new business development, marketing, finance and tax, training and self-development, office admin etc;
- that freelancers do not have any paid annual leave;
- that freelancers do not get paid sick leave.

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<sup>2</sup> through the GEM and Visitor Studies Group JISCMail and GEM Freelance Network Google group (50 responses)

Some freelancers and consultants working with museums are VAT registered and so will charge VAT on their invoices. If you specify a budget, make sure you are clear on whether it includes VAT or not.

The Museum Freelance Network plans to undertake some extensive research into freelancing pricing and a host of other factors in 2018-19 and will publish and circulate this once available.

## Payment schedules

Payment terms and schedules may depend on your museum's terms and preferences, the freelancer's terms and preferences, as well as those of the project funder(s) where relevant.

On larger or longer projects, consider agreeing that the freelancer will invoice in instalments. For example:

- 25% upfront, 25% after milestone 1, 25% after milestone 2 and 25% on completion;
- 50% upfront and 50% on completion;
- in monthly instalments, relating to work undertaken each month.

This will minimise the risk for the freelancer and help budgeting on both sides.

Asking a freelancer to invoice 100% on project completion can otherwise mean they have to wait for payment for work they may have done several months previously, which (especially on larger projects) can cause serious cash-flow issues for freelancers and is not fair.

Please pay promptly in accordance with payment terms agreed up front.

*"Pay them [freelancers] promptly and never ever late. Freelancers' finances can be precarious at times and stressful - please don't make our financial lives harder than they already are."*  
(Freelancer, June 2018)

## Late payment

Freelancers can claim interest and debt recovery costs if a client is late paying for goods or a service – the following information is taken from [the Government's website](#):

Both parties can agree a payment date for the contract. If there is no agreement about payment dates in place, the law says the payment is late after 30 days for public authorities and 60 days for business transactions, after either the client gets the invoice, or the freelancer delivers the goods or provide the service (if this is later).

Freelancers can charge interest if a client is late paying for goods or a service. They can charge 'statutory interest' – this is 8% plus the Bank of England base rate for business to business transactions, unless a different rate of interest is specified in the contract.

Freelancers can also charge a business a fixed sum for the cost of recovering a late commercial payment on top of claiming interest from it. The amount freelancers are allowed to charge depends on the amount of debt:

Amount of debt	What freelancers can charge
Up to £999.99	£40
£1,000 to £9,999.99	£70
£10,000 or more	£100

## Asking a freelancer to work for free

Expecting freelancers to work for free is unacceptable, whether it is:

- expecting freelancers who submit proposals for work to have developed extensive plans before being appointed;
- asking freelancers to work for free as there is no budget but saying it will be good for their portfolio;
- asking freelancers to work for free but promising payment further down the line;
- gradually expanding the remit of work once the freelancer has been appointed, without a corresponding increase in budget (project / scope creep).

*“We don’t have the resources to do free work, please don’t ask us to do the project to win the project.”*

(Freelancer, June 2018)

However, many freelancers are passionate about museums and may well consider taking on some work in a pro bono capacity – for example to give something back to the sector or their community, to broaden their experience or as part of their CPD. They might contribute to the development of a funding application, become a trustee or run a social media account for example. This is at the discretion of the freelancer and expectations on each side should always be clear from the outset.

# 11. Working with a freelancer

## At the start of a project

Make sure you agree realistic expectations and timescales upfront, and be clear on roles and responsibilities. On complex and lengthy projects, it is especially important to establish clear methods of communication and feedback, to monitor progress as you go along.

Ensure you allocate time within your organisation for the project to be delivered, as most projects will need some input from you, even if they are outsourced. You will get the best out of a freelancer if you are available for questions and responsive with feedback.

*“Asking a freelancer to do the job doesn’t mean that the museum doesn’t need to allocate time to review drafts etc and manage the contract.” (Freelancer, June 2018)*

## Contracts

Agree and sign a contract that sets out the work, the deliverables and a process for what to do in the event that something goes wrong; agree payment terms. If you base it on a standard local authority supplier contract, try to adjust it to make it appropriate to a freelancer.

If you need a freelancer to complete supplier forms, or they need a purchase order, arrange for this as soon as possible so it does not delay the start of the work or payment.

The content of the contract will be specific to each museum and freelancer, but might contain:

- Introduction and background – the details of your organisation and the purpose of the work being undertaken;
- The start and end date of the contract;
- A clear statement that the freelancer is self-employed and fully responsible for their own tax;
- The name of the day-to-day contacts on each side;
- The main outputs and deliverables for the work and a timeline for their delivery if applicable;
- Fees and expenses to be paid;
- Invoice procedure and schedule of payments;
- Reporting, monitoring and evaluation;
- Confidentiality, intellectual property rights, data protection;
- Indemnities;
- Conflicts of interest;
- Subcontracting work (you may wish to specify that the freelancer can’t subcontract work unless agreed by you);
- Details of what to do if the contract needs to be amended;
- Termination of the contract (circumstances when this may happen and rights for either side if it does);
- Dispute resolution – what the process is should a dispute occur.

You can find examples of contracts online as a starting point, but it is prudent to seek professional legal advice.

## During the project

Both parties should invest some time in developing their relationship, understanding how each other works and building mutual trust. Remember that you are both working towards the same goals.

*“Treat them as valued employees rather than disposable resources.” (Freelancer, June 2018)*

Communicate clearly, promptly and honestly. Consider tools for sharing documents (if organisational rules allow), for example:

- [DropBox](#) for sharing files with each other
- [WeTransfer](#) for sending large files to each other
- [Trello](#) or [Slack](#) for project management
- [Google Drive](#) and [Google Docs](#), Google Sheets, Google Slides and Google Forms to allow you to access, edit and save files.

On bigger and longer projects, monthly meetings can be a good idea (in person or by phone / video call), or you may want to ask the consultant to send monthly or fortnightly progress reports.

**Avoid ‘project creep’ or ‘scope creep’:** where your requirements for the work develops or expands, without a corresponding increase in the budget. When things do change (for example public consultation indicates that a planned course of action is not appropriate and should be changed), be upfront and clear with the freelancer and discuss the best way forward. For example:

- Can the project timetable be pushed back to accommodate this?
- Can some of the initial work be dropped or deprioritised to accommodate the new work?
- Is there additional budget which could be used to pay the freelancer for the additional work?

Give the freelancer as much notice of change as possible. It is common for freelancers to turn work away as their workplan shows they are fully booked certain weeks or months. If sizeable amounts of work then get pushed back, they have lost out on income from the work they turned away but could have taken on, and may now need to turn away additional work in order to accommodate the slip in timing.

## After the project

It’s useful to have some kind of ‘wash-up’ discussion after a project, whether it’s a formal meeting, or simply a quick phone conversation for both sides to provide feedback on. A simple thank you to the freelancer for their contributions also means a lot!

Some freelancers will ask for a testimonial they can use in their marketing and/or for you to be a referee for future proposals they put together. If you are satisfied with their work, then agreeing to this is of real value to freelancers.

## If issues occur

Total breakdowns in relationships with freelancers are not that common, but when they do occur, it is often due to a lack of clear and agreed objectives between the client and the freelancer. This does not manifest itself until further down the line or when the project nears completion, when perhaps the freelancer has in all likelihood used up their allocated time on the project, but the client feels some elements are not complete or adequate.

To minimise the risk of this happening, ensure that the brief, objectives, timescales and expectations are clear and that you pay promptly on the agreed timescales. Neither side should make assumptions about the other side's knowledge or approach and if in doubt, be sure to clarify. For larger projects, it can also be useful to sit down together and identify potential risks in the project, and ways to avoid them.

If any serious issues cannot be resolved between you and a freelancer, contact [SHARE Museums East](#) for advice and they may be able to find someone to help with arbitration.

## 12. Summary: 8 top tips for working with freelancers

1. Make sure the work is suitable for a freelance contract (check [www.tax.service.gov.uk/check-employment-status-for-tax/setup](http://www.tax.service.gov.uk/check-employment-status-for-tax/setup) if in doubt);
2. Have a clear brief, with clear objectives;
3. Have a transparent procurement process;
4. Have a clear process for communication, feedback and sign-off;
5. Allocate sufficient and appropriate budget;
6. Allow for adequate timescales;
7. Be prepared to invest your time in the project and relationship too;
8. Pay on time.

## 13. About the author to this guide

Christina Lister is a freelance consultant specialising in marketing and audience development projects, training and facilitation. She is a co-founder of the Museum Freelance Network which seeks to support and champion freelancers working in the sector. Christina is a former National Freelancer of the Year runner-up (organised by IPSE – the Association of Independent Professionals and the Self-Employed) and member of the Women Cultural Leaders Network East. [www.christinalister.co.uk](http://www.christinalister.co.uk)

## 14. Thank you

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- Anna Lundberg, business coach and freelance writer, [www.onestepoutside.com](http://www.onestepoutside.com)
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## 15. Resources and links

- Online quiz to check whether a piece of work is appropriate for a freelance contract: [www.tax.service.gov.uk/check-employment-status-for-tax/setup](http://www.tax.service.gov.uk/check-employment-status-for-tax/setup)
- Government guidance about defining self-employment: [www.gov.uk/employment-status/selfemployed-contractor](http://www.gov.uk/employment-status/selfemployed-contractor)
- Q&As from a live discussion facilitated by the HLF about Working with Consultants: [www.hlf.org.uk/community/live-chats/working-consultants-8-march-2018](http://www.hlf.org.uk/community/live-chats/working-consultants-8-march-2018)
- ‘How to write the perfect freelance brief’, a summary of a presentation at the 2017 Museums Association Conference, by consultants Marge Ainsley and Lyndsey Clark <https://ltclark.co.uk/2018/05/15/perfect-freelance-brief/>
- The Association of Independent Professionals and the Self-employed: [www.ipse.co.uk](http://www.ipse.co.uk)
- Research by consultant Rebecca Mileham on the biggest challenges facing freelancers: [www.rebecca.mileham.net/blog-posts/survey-results-5-what-are-the-biggest-challenges-facing-freelancers](http://www.rebecca.mileham.net/blog-posts/survey-results-5-what-are-the-biggest-challenges-facing-freelancers)
- The Information Commissioner’s Office guide to GDPR for the self-employed and micro-businesses: [www.ico.org.uk/for-organisations/business/](http://www.ico.org.uk/for-organisations/business/)

### Project management tools

- DropBox for sharing files with each other ([www.dropbox.com](http://www.dropbox.com))
- WeTransfer for sending large files to each other ([www.wetransfer.com](http://www.wetransfer.com))
- Trello or Slack for project management ([www.trello.com](http://www.trello.com) and [www.slack.com](http://www.slack.com))
- Google Drive, Google Docs, Google Sheets, Google Slides and Google Forms to allow you to access, edit and save files ([www.google.co.uk/drive](http://www.google.co.uk/drive) and [www.google.com/docs/about](http://www.google.com/docs/about)).

### Putting your freelancing job on job sites and e-newsletters

Free sites include:

- University of Leicester Museums Studies Jobs Desk: [www2.le.ac.uk/departments/museumstudies/JobsDesk](http://www2.le.ac.uk/departments/museumstudies/JobsDesk)
- Arts Council England jobs site: [www.artsjobs.org.uk](http://www.artsjobs.org.uk)
- The Visitor Studies Group JISCMail: [www.jiscmail.ac.uk/lists/VSG.html](http://www.jiscmail.ac.uk/lists/VSG.html)
- The Museums Computer Group JISCMail list: [www.museumscomputergroup.org.uk/join/mcg-community-discussion-list/](http://www.museumscomputergroup.org.uk/join/mcg-community-discussion-list/)
- The Archives-NRA JISCMail list (aimed at archivists, conservators and records managers): [www.jiscmail.ac.uk/cgi-bin/webadmin?A0=ARCHIVES-NRA](http://www.jiscmail.ac.uk/cgi-bin/webadmin?A0=ARCHIVES-NRA)
- The regional Museum Development Organisations’ websites and/or e-newsletters:
  - SHARE Museums East: [www.sharemuseumseast.org.uk/contact](http://www.sharemuseumseast.org.uk/contact)
  - South East Museums: [www.southeastmuseums.org/contact-us](http://www.southeastmuseums.org/contact-us)
  - South West Museum Development Programme: [www.southwestmuseums.org.uk/about-us/who-we-are](http://www.southwestmuseums.org.uk/about-us/who-we-are)
  - London Museum Development: [www.museumoflondon.org.uk/supporting-london-museums/specialist-support/contact-team](http://www.museumoflondon.org.uk/supporting-london-museums/specialist-support/contact-team)
  - West Midlands Museum Development: [www.mdwm.org.uk](http://www.mdwm.org.uk)
  - Museum Development East Midlands: [www.mdem.org.uk/contact-us](http://www.mdem.org.uk/contact-us)
  - Museum Development North East: [www.museumdevelopmentne.org.uk/contact-us](http://www.museumdevelopmentne.org.uk/contact-us)

- Museum Development North West: [www.museumdevelopmentnorthwest.wordpress.com/how-to-post-a-job](http://www.museumdevelopmentnorthwest.wordpress.com/how-to-post-a-job)
- York Museums Trust: [www.yorkmuseumstrust.org.uk/contact-us/general-contact-enquiries](http://www.yorkmuseumstrust.org.uk/contact-us/general-contact-enquiries)
- Museums Galleries Scotland: [www.museumsgalleriesscotland.org.uk/contact-us](http://www.museumsgalleriesscotland.org.uk/contact-us)
- Welsh Museums, Archives and Libraries Division: [www.gov.wales/topics/culture-tourism-sport/museums-archives-libraries/?lang=en](http://www.gov.wales/topics/culture-tourism-sport/museums-archives-libraries/?lang=en)
- Northern Ireland Museums Council: [www.nimc.co.uk](http://www.nimc.co.uk)
- You can send ads to the [www.arts-consultants.org.uk](http://www.arts-consultants.org.uk) website for free, and they will only go out to the site's members.

### **Paid-for opportunities include:**

- Museums Association: [www.museumsassociation.org/advertise/recruitment-advertising](http://www.museumsassociation.org/advertise/recruitment-advertising)
- GEM's e-Bulletin, website, monthly e-News: [www.gem.org.uk/advertise-with-gem/advertise-a-job](http://www.gem.org.uk/advertise-with-gem/advertise-a-job)
- Arts Marketing Association: [www.a-m-a.co.uk/job-adverts](http://www.a-m-a.co.uk/job-adverts)

### **Freelancer directories**

- Museums Association's Find a Supplier: [www.museumsassociation.org/find-a-supplier](http://www.museumsassociation.org/find-a-supplier)
- Museums Association's Museum Services Directory (printed every April)
- Association of Independent Museums (AIM) Suppliers Directory: [www.aim-museums.co.uk/suppliers-directory](http://www.aim-museums.co.uk/suppliers-directory) (see also the AIM Directory in the back of AIM's newsletters)
- Arts Marketing Association's freelancer directory: [www.a-m-a.co.uk/network/freelance-directory](http://www.a-m-a.co.uk/network/freelance-directory)
- GEM's list of suppliers: [www.gem.org.uk/suppliers](http://www.gem.org.uk/suppliers)
- Visitor Studies Group: [www.visitors.org.uk/find-a-consultant](http://www.visitors.org.uk/find-a-consultant)
- Arts Professional's Arts Services Directory: [www.artsprofessional.co.uk/services](http://www.artsprofessional.co.uk/services)
- Arts Consultants' directory: [www.arts-consultants.org.uk](http://www.arts-consultants.org.uk)

### **Procurement sites in the East of England**

- Bedfordshire:
  - Bedford Borough Council: <https://in-tendhost.co.uk/bedford.aspx/Home>
  - Central Bedfordshire Council: <https://in-tendhost.co.uk/centralbedfordshire.aspx/Home>
  - Luton Borough Council: <https://procurement.luton.gov.uk/web/login.shtml>
- Cambridgeshire:
  - Cambridgeshire County Council: [www.gov.uk/contracts-finder](http://www.gov.uk/contracts-finder)
  - Peterborough City Council: <https://secure.sourcedogg.com>
- Essex:
  - Essex County Council iSupplier Portal: [www.essex.gov.uk/Business-Partners/Supplying-Council/Pages/Supplier-portal.aspx](http://www.essex.gov.uk/Business-Partners/Supplying-Council/Pages/Supplier-portal.aspx)
  - PAE, the Procurement Agency for Essex: [www.paessex.gov.uk/about-the-pae](http://www.paessex.gov.uk/about-the-pae)
- Hertfordshire:
  - Supply Hertfordshire: [www.supplyhertfordshire.uk](http://www.supplyhertfordshire.uk)
- Norfolk:
  - Norfolk County Council: [www.gov.uk/contracts-finder](http://www.gov.uk/contracts-finder)
- Suffolk:
  - Suffolk Sourcing: [www.suffolksourcing.uk](http://www.suffolksourcing.uk)