The Road to Wigan Pier?

Managing Local Authority Museums and Art Galleries
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LONDON: HMSO
Preface

The management of museums and art galleries* and the purposes for which they are provided are currently the subject of vigorous debate. This debate has centred on the rôle of the great national museums (such as the Natural History Museum and the Victoria and Albert) which account for about half the public expenditure on museums in England and Wales.

Much of the debate has concerned the rôle of curators and the balance to strike between caring for, and carrying out research on, objects held by the museum and making the results of this work accessible to the public. The temperature of the discussion has been raised by the financial pressures facing some national museums. Some have introduced admission charges, while sponsorship, merchandising and sales have become important sources of additional income. These changes mean that marketing and visitor services have been receiving greater emphasis. Considerable effort is being put into the development of performance measures for the national museums.

Local authority revenue expenditure is almost the same as that on the national institutions although it is spread across more than 650 museums and galleries. Their problems are like those of the national museums. The Audit Commission has therefore undertaken a value for money review of local authority support for museums. The review has looked not only at the immediate challenges facing local authority museums, but also at the more long-standing problems which need to be addressed if value for money is to be improved. The study also examined local authority support for entertainment and the arts, which has been the subject of a separate report.

The research was carried out by a team from the Commission's Directorate of Local Government Studies headed by Richard Shore and John Gaughan, and including Geoffrey Lewis, formerly Director of Museum Studies at the University of Leicester and previously Director of Museums for Merseyside County Council. The team has also received helpful advice from a consultative group containing representatives of the ADC, ACC, AMA, ALA and LBA. It has also consulted the DOE, the Welsh Office, the Office of Arts and Libraries (OAL), trade union bodies, the Museums and Galleries Commission (MGC), several national museums, some Area Museums Councils (AMCs) and professional and other bodies including the Museums Association, the Group of Directors of Museums, the Museum Training Institute (MTI), the Association of Independent Museums (AIM) and the Association for Business Sponsorship of the Arts (ABSA). The report also draws upon published statistical and other data and upon fieldwork with the local authorities listed in Appendix A. The Commission is grateful to all for the help and advice they have given. But, as with all its reports, responsibility for the interpretation of data and for conclusions and recommendations rests with the Commission alone. The Commission's auditors will be following up this report during 1991, examining arrangements in individual authorities.

* 'Museums' is henceforth used as a shorthand throughout this report to encompass both art galleries and museums. Art galleries are mentioned specifically when points of particular relevance to them are discussed. The report does not cover exhibition spaces in libraries, theatres and arts centres.
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Local authorities provide and operate many of the museums and art galleries in England and Wales. They attract about 20 million visitors a year, a figure comparable to the number of visitors to the national museums (Exhibit S1). Authorities’ net expenditure on revenue support for these museums and galleries is about £90 million a year. In addition, other museums receive revenue grants from local authorities, worth in total £6 million per annum.

Summary

Local authorities provide and operate many of the museums and art galleries in England and Wales. They attract about 20 million visitors a year, a figure comparable to the number of visitors to the national museums (Exhibit S1). Authorities’ net expenditure on revenue support for these museums and galleries is about £90 million a year. In addition, other museums receive revenue grants from local authorities, worth in total £6 million per annum.

Exhibit S1
LOCAL AUTHORITY AND NATIONAL MUSEUMS
Local museums are of almost equal significance to national museums


Local authority museums differ considerably in size and in the themes they cover, ranging from great nineteenth century municipal foundations to smaller institutions which concentrate on their local area; over 40% have been set up in the last two decades.

Local authorities’ expenditure on museums is discretionary, under sections 12 and 14 of the Public Libraries and Museums Act 1964. The Act does not, however, clearly set out the purposes which museums are to serve. One view is that they exist to acquire and care for collections, which may illustrate the cultural, historical, scientific or artistic life of a region or locality, that these collections are held in trust on behalf of society and that there is a duty to display and interpret them for the benefit of the public. However, authorities support museums not only to conserve objects (and historic buildings) but to contribute to the quality of life and to support education; museums can also help attract tourists and contribute to place marketing and the attraction of new investment to an area. In practice, however, museum services have tended to evolve in a piecemeal way, often without clear objectives.
Within the museum profession, parallel pursuit of the twin causes of conservation and exhibition generates tension. Achieving the right balance between stewardship of the collection and presenting the results of that work to the public is not easy. Conservation and documentation of collections, and research on them, are essential activities. But in some local authorities too little attention has been paid to attracting the public to the museum. Curators have sometimes concentrated on professional issues related to the collection rather than managerial ones such as marketing. As a result some local authority museums are worthy but dull.

Despite the emphasis on the collection, many collections lack coherent themes. Some are also badly documented and deteriorating because they are poorly stored.

Many of these difficulties – particularly those relating to collections – are long-standing and may reflect low past investment. They have often been inherited rather than created by those now responsible for museums.

And the environment in which museum professionals work is often difficult. Some claim they cannot interest council members and senior officers in the problems which must be addressed if local authority museums are to respond adequately to the new pressures they face.

There are three areas of particular concern:

— finance. The community charge is focusing attention on costs. Museum services need to demonstrate that they are giving value for money. Comparisons between local authority and other museums may enter the debate, with staffing levels coming under particular scrutiny. There is interest in charging for admission and in attracting sponsorship;

— education reform. Museums have to reappraise the support they provide to schools to ensure they meet the needs of schools as they implement the national curriculum. Local management of schools raises questions about the funding of this support;

— museum registration. The Museums and Galleries Commission (MGC) registration scheme will be fully in place by April 1992. Museums which are not registered will not be eligible for grant and other support from the MGC or Area Museum Councils. The scheme has already stimulated a welcome reappraisal of collecting policies and of the documentation and storage of collections. But many museums will need to make capital and revenue investments to meet registration requirements.

Authorities need first to be clear about why they are supporting museums, to set objectives for them and then to devise a business or development plan for the service. This should give proper weight to the need for conservation, scholarship and research but be firmly customer orientated. Services provided should be targeted at the chosen customers and decisions on charging should be consistent with the chosen targets and the authority’s overall policy aims. Detailed feasibility studies are needed whenever new museums are being considered.

Reviews should not concentrate solely on in-house provision but should also consider the rôle and purpose of grant aid and other support to independent museums. Activities which contribute to meeting the authority’s objectives and feedback on achievement should be a prerequisite for support.

A museum should have arrangements for dealing with any documentation backlogs. It should also have a clearly stated acquisition policy and should, wherever possible, dispose of
objects which do not fit that policy. Arrangements for dealing with storage problems can then be made.

Managerial arrangements should also be customer related and assign responsibilities for site management of museums including market research, attracting customers, delivering services and customer care. Collection management responsibilities should also be clear. Staff training will often be needed to help implement new approaches; training standards and training courses for a wide range of museum staff and skills are now being developed by the Museum Training Institute. Staff should have clear objectives, which are, wherever possible, quantified and should receive performance related pay. Performance monitoring arrangements should be developed or improved. Success should not be penalised; museums which make savings or increase their incomes should be allowed to use at least some of that money to improve services or care of the collection.

Central government can assist by clarifying the law relating to local authority museum provision, particularly their collections. This should continue the stewardship of local authorities and prevent asset stripping but, at the same time, allow the appropriate disposal of duplicate and other unwanted items. This will help authorities develop and introduce rational collecting policies. Touring exhibitions of objects held by the national collections should also help improve the quality of museum services received by people who do not live in the few cities where most of the major national collections are housed.
Exhibit 1
THE SERVICES MUSEUMS PROVIDE
Museums' services are not confined to conservation and exhibitions

<table>
<thead>
<tr>
<th>Conserving the heritage (Stewardship)</th>
<th>General visitor services</th>
<th>Education</th>
<th>Information</th>
<th>Support for scholarship and research</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>• preserving objects for current and future generations</td>
<td>• exhibitions</td>
<td>• organised visits</td>
<td>• maintaining databases</td>
<td>• providing access to the collection</td>
<td>• Support for special interest groups (e.g. by providing meeting rooms)</td>
</tr>
<tr>
<td>• preserving buildings for current and future generations</td>
<td>• permanent</td>
<td>• teaching material</td>
<td>• geology</td>
<td>• publishing specialist catalogues</td>
<td>• corporate marketing and hospitality (sponsorship)</td>
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<td>• special</td>
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<td>• ecology</td>
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<td>• museums development (advice to independent museums)</td>
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<td>• mobile (outreach)</td>
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<td></td>
<td>• information</td>
<td>• tutorial rooms</td>
<td>• responding to planning enquiries</td>
<td>• carrying out specialist research to advance knowledge</td>
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<td></td>
<td>• lectures</td>
<td>• curriculum related lectures</td>
<td>• responding to enquiries from the public (e.g. identifying objects)</td>
<td>• research to develop and expand the collection</td>
<td></td>
</tr>
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<td></td>
<td>• enquiry points</td>
<td>• loans</td>
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<tr>
<td></td>
<td>• support</td>
<td>• maintaining databases</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| | • catering | • geology | | | | }

• general publications
• pamphlets
• guides etc
• providing outside publishers with photographic illustrations
1. The Heritage

TYPES OF LOCAL AUTHORITY MUSEUM

1. Local authority museums are diverse. They include great nineteenth century municipal foundations, such as the City of Birmingham Museum and Art Gallery, which cover a broad range of cultural and scientific topics as well as smaller institutions which concentrate on their local area but nevertheless deal with many subjects; the Central Museum at Southend, for example, covers the geology, archaeology, social and local history, local wildlife and industrial history of South East Essex.

2. Other museums focus on particular themes. Middlesbrough is home to the Captain Cook Birthplace Museum. The Cotswold Countryside Collection at Northleach deals with local farming history and rural life. The same relatively small authority – Cotswold District Council – also provides the Corinium Museum at Cirencester which holds important Roman remains. Other local authority museums are also specialised; for example, Kirklees provides the Holmfirth Postcard Museum.

3. Despite this diversity there are common strands within local authority provision. Museums covering a broad range of topics are likely to be nineteenth or early twentieth century foundations. The great Victorian museums and art galleries of the major provincial cities reflect a sense of cultural identity and civic pride. They brought into public ownership many collections which had previously been inaccessible to the general public. These collections were also seen as having an important educational rôle.

4. Newer museums are more likely to concentrate upon one, or a few, themes. Local and industrial history are popular as the pace of social and technological change increases. Initiatives such as Clwyd County Council’s development at the eighteenth century ironworks site at Bersham recognise the significance of the country’s industrial heritage. Technological and industrial change is not, however, confined to the eighteenth and nineteenth centuries; the Sinclair C5 is already on museum display. Leicestershire County Council’s new Industrial Adventure Museum at Snibston is not only concerned with the industrial heritage but is intended to have a rôle in present day and future technological education.

THE SERVICES PROVIDED

5. The services local authority museums provide are also varied (Exhibit 1). An individual museum or authority may not provide all of them and, in some cases, more specialised services are provided by other council departments; for example databases of archaeological sites are often maintained by planning departments. Exhibitions and visitor support services are typically aimed at a wide public. Other services target smaller, specialised groups, for example providing scholars with access to the collection.
6. A specific example may best illustrate the range and diversity of museum activities. Leicestershire County Council not only runs museums and their associated retail operations throughout the county, it also employs education officers who liaise with schools, prepares material for use during organised educational visits to museums and loans original social history and other objects to schools as teaching aids. It is setting up a comprehensive computer-based archaeological, geological and ecological database which is drawn upon for a variety of purposes including support for the planning process. There is a vigorous publications programme both of material aimed at the general reader and of specialist books and articles. The service also provides meeting rooms, speakers and other support to local special interest groups and operates a mobile museum.

CURRENT PROVISION

7. The number of local authority museums has increased since 1970. About a quarter of the total were created between 1971 and 1980 and a further 120 have come into being since 1981. This rise in local authority provision is part of a general increase: about 40% of independent museums have been created since 1970*. At least 86 independent museums opened in Great Britain (including Scotland) between 1970 and 1979 and at least 103 more between 1980 and 1989**. The growth in the number of museums may reflect an increased interest in conserving the heritage and providing a sense of place and continuity at a time of great social and technological change.

8. There are marked regional differences in provision. Over a third of all museums in England and Wales are in London and the South East. Adjusted for population, however, the number of museums in this area is close to the national average. In contrast there are unusually high numbers of both local authority and independent museums in the South West. Overall numbers in the North West and the East and West Midlands are below average, in the first two cases largely because of relatively low numbers of independent museums.

9. Local authorities' net revenue expenditure on museums has increased in real terms since 1980 (Exhibit 2), even though some large museums have been transferred from local government, for example with the creation of the National Museums and Galleries on Merseyside following abolition of Merseyside County Council. Capital expenditure varied markedly during the 1980s (Exhibit 3).

10. Shire districts are the highest spending group of councils, though metropolitan districts and county councils also incur significant expenditure; London contains the main buildings of many of the national museums and London boroughs tend to spend little (Exhibit 4). About 40% of the net expenditure by London authorities has been by the Corporation of London. (Total local government expenditure in London may now fall: the Horniman and Geffrye Museums, which had a combined budget of about £1.6 million in 1989/90, have passed from local authority control following abolition of ILEA). Expenditure per head of population is highest in

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** 'Cultural Trends 4 – Museums, Visual Arts, Crafts, the Art Trade, the Built Heritage', edited by Andrew Feist and Robert Hutchison with Kate Manton, Policy Studies Institute, 1989.


**Exhibit 2**

**NET REVENUE EXPENDITURE ON LOCAL AUTHORITY MUSEUMS**

Revenue expenditure has increased in the 1980s in real terms


**Exhibit 3**

**CAPITAL EXPENDITURE ON LOCAL AUTHORITY MUSEUMS**

Investment in local authority museums has continued in the 1980s

Source: DoE and Welsh Office statistics. Data for later years is not yet available

**Exhibit 4**

**NET REVENUE EXPENDITURE PER ANNUM BY TYPE OF AUTHORITY**

Shire districts are the highest spending group

Source: CIPFA Leisure estimates, 1989/90
13. Local authority provision of museums is discretionary under S12 of the Public Libraries and Museums Act 1964; Section 14 of the same Act gives the power to make grants. All local authorities in England and Wales have these powers, except for town, parish and community councils. A few of the latter nevertheless do provide or support museums under the powers conferred by Section 137 of the Local Government Act 1972. The Museum of London is

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*"Museums U.K." Data is for non-national museums which are not provided directly by central or local government."
provided under the Museum of London Act 1965, as subsequently amended to take account of abolition of the GLC, and is funded by the Corporation of London and central government. The City’s contribution to the Museum of London accounts for close to half of all local authority support for outside museums. Various local acts also apply.

14. The 1964 Act does not clearly set out the purposes which museums are to serve. Local authorities support museums for a variety of reasons, which vary from authority to authority and may have changed since a museum was founded. Authorities are increasingly formalising their reasons for support in mission statements. Fewer have yet, however, moved on from those statements to set more detailed, measurable objectives.

15. Museums conserve the heritage, making it available to current and future generations. Many collections have been donated by benefactors or acquired by the authority to guarantee their preservation. For example, the Leicestershire Museum and Art Gallery at New Walk, Leicester is based on the collection of the Leicester Literary and Philosophical Society, commenced in 1839. Conservation does not apply simply to the objects in a museum’s collection. One common reason for a museum is to use a building which the authority either wishes or is obliged to preserve. Under 10% of local authority museum buildings are less than 20 years old, about 60% date from before 1900 and about 70% are listed buildings.

16. Support for both formal education and for continuing personal development remains an important aspect of museum services and some are part of their authority’s education department. Many museums employ education officers, encourage organised educational visits, provide teacher and pupil packs or offer special lectures to schools. Education officer posts have often been wholly or partly funded from the education budget.

17. Local authorities increasingly see themselves as having a major rôle in providing leisure opportunities and improving the quality of life. Leisure time and real disposable income increased for most people in the 1980s; this trend is expected to continue in the 1990s and beyond. Museums can also give people a sense of place, local pride and identity; displays and exhibits which explain local social, cultural, natural and industrial history are an important feature of many museums. Some museum services are therefore closely linked to local record offices; others are involved with oral history projects.

18. Some authorities support museums to help boost the local economy. The 1980s saw the collapse of many traditional industries and a shift from manufacturing towards service industries. Research such as John Myerscough’s work for the Policy Studies Institute* has helped bring economic arguments for supporting museums (and the arts) into the spotlight. Museums can help attract day trippers and tourists to an area. They can also contribute to place marketing and the attraction of new investment. The Wigan Pier Heritage Centre, the funding for which was provided by a variety of public and private sources including the EC Social Fund, central government and the English Tourist Board, is a major tourist attraction with half a million visitors in its first year of operation; its success has attracted investment to the area and contributed to Wigan’s economic regeneration. Support for the local economy is now an important factor in the way in which major provincial cities such as Birmingham and Nottingham are developing

*The Economic Importance of the Arts in Britain*, John Myerscough, Policy Studies Institute, 1988.
their museums. In some authorities, for example Clwyd and Allerdale, museums fall within the same unit as economic development.

* * *

19. As this discussion has highlighted, the museum services of local authorities have evolved in a somewhat piecemeal way. But in the future clear objectives will be needed if resources are to be used effectively. Setting objectives brings to the surface long-standing tensions within the profession over the management of museums, which are the subject of the next Chapter.
2. The Problems and Pressures

20. Although the 1964 Act offers no definition, the Museums Association, the umbrella body to which many professionals and museums belong, has defined a museum as:

'an institution which collects, documents, preserves, exhibits and interprets material evidence and associated information for the public benefit'.

21. Exhibiting is only one of the five activities in this definition. The collection, conservation and documentation of original objects and research on them are the essential foundations on which all museum services rest. It is not otherwise possible to produce accurate informative and attractive displays, exhibitions, catalogues and other publications and services. However, some museums pay insufficient attention to presenting their collections to the public and, though worthy, are dull.

22. Despite the importance of the collection, many collections lack clear themes, are badly documented and are deteriorating because of poor storage conditions. These collection related issues are long-standing problems which may sometimes reflect low past investment. But museums also face new pressures, including financial ones resulting from the introduction of the community charge, which may make change necessary.

STRIKING A BALANCE

23. Research commissioned by the Office of Arts and Libraries* has shown that, on average, two thirds of the gross revenue cost of a museum relates directly to the collection – security, storage and conservation, research etc. Though the collection is central to the work of a museum, a balance is needed between collecting, stewardship and scholarship, on the one hand, and presenting the results of that work to the public on the other (Exhibit 6 overleaf).

THE COLLECTION

24. Some collections do not have clear themes; they may reflect the enthusiasms and interests of individual curators and keepers or the benefactors who have donated objects. It may be difficult to use them in informative and attractive displays and exhibitions.

Exhibit 6

THE FUNCTIONS OF A MUSEUM SERVICE

A museum service should provide a range of functions which complement one another

STEWARDSHIP AND SCHOLARSHIP

25. The OAL research also found that, on average, local authority museums have only about 13% of their collections on display at one time. Reserve collections exist for a variety of reasons:

— they provide primary evidence for the study of a subject and thus support scholarship both by outsiders and by the museum’s own staff. Many of the objects held are unlikely to have much appeal to the general public;

— reference collections of archaeological, biological, geological and other material may be needed to classify objects and specimens brought to the museum by members of the public for identification;

— exhibits can deteriorate when on display. Prints and fabrics, for example, fade on exposure to light; it is usual therefore to rotate objects from the reserve collection;

— objects may be held for future use. For example, common contemporary household objects might be acquired because, in the future, they may form a useful part of a social history or technology collection;

or simply because the museum lacks the exhibition space to show all that it would like to display. Reserve collections may then be drawn upon to create an exciting, attractive and cost effective temporary exhibition programme. Such temporary exhibitions can help encourage people to make return visits.

26. Many collections are poorly documented. The ‘Museums U.K.’ survey found substantial backlogs in recording details of collections (Exhibit 7). For example, only about half of local authority museums had a full, or near complete, accession record and only a quarter of them had anything approaching a complete index to facilitate retrieval from the collections they hold; over one third had no effective index at all. Other work* and the Audit Commission's research have confirmed the overall picture. For example, one museum had no records of its acquisitions over a thirty year period. Inadequate records mean that collections are of little or no use for scholarship and research. They also make it more difficult to prevent, and can make it virtually impossible to detect, the loss of valuable items from art galleries or other types of museum.

Many local authority museums have documentation backlogs

For example, only 25% of museums have 91% or more of their collections indexed

Source: Museums U.K.

27. Objects are often stored in unsuitable conditions and are deteriorating. In one authority social history artefacts – agricultural implements, vehicles and carts – were held in an unheated hut without electric light, with holes in the roof and with damp rising from an earthen floor; some objects had deteriorated badly.

28. These problems are not unique to local government. For example, the National Audit Office identified inventory backlogs and poor storage conditions at some of the national museums and has commented that ‘it will be years, if ever, before damage and deterioration which have already taken place can be remedied’. Such problems are often long-standing; some local authority museums are still documenting material collected in the nineteenth century. But newer museums can also have difficulties; in one authority a museum opened in the mid-1970s had recorded details of only one quarter of its collection.

29. The causes of these difficulties are understandable. Both in the nineteenth and the twentieth centuries, museums have wanted to build up collections but have lacked formal collecting policies. They have been tempted to acquire whatever objects are available, fearful that they would be offered elsewhere or, in the case of archaeological, social history or industrial history material, would simply be destroyed. The need for adequate documentation, and long-term conservation and storage requirements, and costs, can easily be overlooked. Full advance costing of new acquisitions, including the costs of restoration and storage, is still rare. The fact that important material may otherwise be destroyed can also make it difficult for an established museum to refuse a donation or bequest even if the material bears no relation to the topics the museum covers, the collection has little or no accompanying documentation, and the museum lacks the resources to look after it properly.

ACCESS AND MARKETING

30. Scholarship and conservation are essential to a museum. Without them displays, though lively, may be superficial and uninformed and may even be misleading or incorrect. But scholarship and conservation have little point if people do not visit a museum or use its services.

31. Traditionally, museums are run by curators. Though highly motivated and often working long hours, some have had little interest in presenting the results of their work to the public. Marketing and display skills have not always been valued and the presentational skills of organisations such as Madame Tussaud's or Walt Disney are sometimes viewed with suspicion. As a result, local authority museums may present themselves poorly to the public. Many curators nevertheless appreciate the contributions that working models or computer and other image generation can make to a museum; but others fear that any increase in attendances, following changes in presentational style, will be transient, and that the changes will alienate museums' existing core audiences.

RENEWAL

32. Many collections are moribund. Few objects are added to them and even fewer transferred to other museums or disposed of elsewhere. The 'Museums U.K.' survey revealed that the median number of objects acquired in a year by local authority museums was only a few hundred per museum. Lack of resources helps explain this. At present, over half of local authorities' museum services have no purchasing budget and, overall, only about one and a half per cent of revenue expenditure is on new objects. Authorities are sometimes unable to acquire because storage space is full and their curatorial and conservation resources fully occupied. It is also difficult to obtain new objects in some fields; prices in the art market mean that local authorities depend almost entirely on benefactors for new acquisitions.

33. Collections often remain unchanged no matter how inappropriate to the museum's current purpose. Objects tend to be retained even if the museum does not know what they are, cannot look after them and has no use for them. The 'Museums U.K.' survey found that 86% of local authority museums had disposed of no objects at all in the previous year.

34. Disposal of objects is rare partly for legal reasons. One widely expressed view, which has not been tested in the courts, is that objects donated to local authority museums are held in trust and can be transferred to other museums but cannot be sold or otherwise disposed of without ministerial consent*. Many museum professionals are strongly opposed to any transfer of objects from their collections.

THE STATUS OF THE MUSEUM PROFESSION

35. A change in the culture and status of the museum profession may be needed to resolve these long-term problems. Training traditionally concentrated on curation rather than managerial, marketing, presentational and other skills (while attendants and warding staff, the people with the greatest contact with the public, sometimes received no training at all). Curators have usually seen their careers in terms of movement between museums and in connoisseurship, conservation and interpretation. Few have had ambitions to manage the broader leisure

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or education departments in which museums are often located. There has also been comparatively little job mobility between different museum sectors, particularly between the national and non-national museums.

36. The position is improving. The Museums and Galleries Commission* (MGC) has examined training and career structures and received evidence from some professionals about difficulties in career development and training being too narrow and too academic.** The Museum Training Institute has since been set up with the support of the Museums Association, the MGC and the Office of Arts and Libraries and is acting as the lead body, developing training standards and training courses for a wide range of museum staff and skills, within the vocational training framework set by the National Council for Vocational Qualifications. Museum professionals with a recognised management qualification may find it easier to move into other areas of work; a standard system of training and qualifications may also encourage movement between the different museum sectors.

37. In some authorities, museum professionals who wish to address documentation, storage and other problems have found it difficult to interest senior officers and members. Many curators believe that the size of their museum service and its location within the authority are a factor. The majority of local authority museums and museum services are small and their visibility within the authority low.

38. For example, the average local authority museum employs only eight full-time staff and over half of local authority museum directors and senior curators are fourth tier officers or lower. Museums rarely have their own committee and are instead dealt with by, for example, the education, the libraries or, most commonly, the recreation/leisure or amenities committee. Some museum staff complain that the officers and committees they report to do not understand and are unsympathetic to museums. Some of this lack of attention may have been because curatorial staff have not had the skills to make their case or because they have welcomed the absence of senior officer and member involvement.

PRESSURES FOR CHANGE
FINANCIAL PRESSURES

39. Financial pressures on museum services are increasing. In the community charge regime discretionary services such as museums are coming under special scrutiny: the pressures are particularly acute where councils have been, or risk being, charge capped. Local authority museums need to demonstrate that they are meeting genuine public needs, that they are well managed and that they require, and make good use of, the subsidy they receive from their authority.

40. Costs are likely to receive increasing attention. Local authorities' net expenditure equates to about £4.50 for every visit to their museums, but there are wide variations between authorities (Exhibit 8 overleaf). Comparisons between authorities need to be treated with great caution. Museums differ greatly in the buildings they are housed in and the collections they hold.

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* The MGC was founded in 1930 but assumed its present responsibilities in 1981 and received its Royal Charter in 1987. It is funded primarily by grant-in-aid from the OAL. Its objects include promoting the development of museums in the U.K. It spent about £7 million in 1989/90, £6 million of which was on grants of various kinds.

Exhibit 8

NET EXPENDITURE PER VISITOR

Net expenditure per visitor varies considerably from authority to authority; only two authorities have a net surplus per visitor.

Source: CIPFA Leisure estimates, 1989/90

They provide other services as well as ones to visitors. Attendance figures may not always be accurate. Nevertheless museums with high net expenditure per visit should be able to explain the reasons.

41. Lack of management information may make it difficult to justify high expenditure. The low profile of museum services and the limited development of detailed objectives means that performance monitoring is often weak. Only a minority of authorities are comparing achievement with targets for all the museum services they provide. In some cases members have little detailed idea of what those services are or how staff are employed. Many professional staff, particularly outside the largest museums, are involved with several of the services their museum provides. They are not, however, asked to record how they use their time. So, few authorities accurately cost the different museum activities they support. Even where data exists it is usually not presented to members.

COMPARISONS WITH OTHER MUSEUMS

42. Financial pressures, and the growth of the independent sector, mean that there is likely to be increased interest in comparing local authority and other museums. Such comparisons need to be used with great care because they are not always comparing like with like. National museums are far larger than the typical local government operation. Independent museums tend to be far smaller than local authority ones (Exhibit 9). Independent museums also tend to have fewer objects in their collections and thus to be conserving less of the heritage for future generations, to have greater proportions of their collections on display and to be located in holiday areas or have otherwise chosen their locations to match modern visitor preferences. Their directors are less likely to have formal academic or museological qualifications. Independent museums also tend to close in off-season periods (Exhibit 10). Some are staffed entirely by volunteers. Many independent museums could not survive without grants from local authorities and other sources.
Some also depend on local authorities for uncharged conservation, curatorial and other professional advice and support.

43. Typically, however, subsidy forms a much lower proportion of income in independent museums than in the local authority sector. On average, independents recover about half their revenue expenditure as earned income, via admission charges, trading operations, fund raising etc. In comparison, local authority museums recover about 13% of gross revenue expenditure. Admission charges help explain this. About two thirds of independent museums charge
compared with under 30% of local authority ones. But independent museums also have different expenditure profiles. They incur a slightly lower proportion of expenditure on conservation and curation and a markedly lower proportion on warding and security (i.e. attendants, night time patrols etc.) than local authority museums. Marketing and sales in contrast, account for a far greater proportion of expenditure (Exhibit 11).

**Exhibit 11**

**EXPENDITURE BY DIFFERENT TYPES OF MUSEUM**

Local authorities tend to incur a higher proportion of their costs on warding, and lower proportions on advertising and sales, than independent ones.

Though independent museums may receive grant aid, they do not have the guarantee that a parent local authority will meet their operating deficit; many need income from admissions and sales to survive. They therefore pay great attention to sales and marketing. For example, the Ironbridge Gorge Museum, a major independent museum which is larger than the typical local authority operation, offers Merrythoughts Teddy Bear Shop and Museum and the Shop in the Square as well as the Coalport China Museum, the Coalbrookdale Museum of Iron and others. The national museums also face financial pressures. Many are also paying great attention to marketing, sales and other income generation; some are promoting their merchandise via advertisements in the national press.

Museums which depend on admission charges and sales need not only to attract visitors but to give them an enjoyable experience which they feel has provided value for the time and money they have spent. Word of mouth recommendation is one of the most effective marketing techniques, while stories spread by dissatisfied visitors can adversely affect attendance and income. Competitive museums pay great attention to visitor services and aim to be lively and stimulating places to visit. This emphasis on visitor services can be combined with scholarship and conservation. National Heritage’s Museum of the Year Award has been won by such different museums as the Imperial War Museum (one of the national museums), Ironbridge Gorge Museum and Clwyd County Council’s Bodelwyddan Castle Museum.

Independent museums can have problems. A recent study by AIM has concluded that ‘whatever their curatorial flair and expertise, most trustees, curators and departmental heads in
the independent sector currently lack training and professional skills in the basic principles of management. These include corporate planning/developing strategies for change; human resource management; customer care; and marketing and research*. Nevertheless, high profile museums such as the larger independents and the nationals help set the standards against which local authority museums are judged. Many local authority museums need to improve if they are to bear comparison.

STAFFING

47. Staffing is one area where comparisons may be drawn with independent museums. Staffing accounts for close to 50% of local authorities’ expenditure on museums. The ratio between number of staff and number of visitors varies markedly from authority to authority (Exhibit 12). Though such a comparison must be used with care, for example because of the diversity of local authority museums, it does suggest a need to appraise staffing arrangements.

Exhibit 12

VISITS PER FULL TIME EQUIVALENT (FTE) EMPLOYEE IN LOCAL AUTHORITY MUSEUM SERVICES

Visits per full time equivalent varies considerably from authority to authority

Source: CIPFA Leisure estimates, 1989/90

48. Warding is a significant component of operational expenditure in local authority museums. Warding costs tend to be a lower proportion of total expenditure in independent museums (Exhibit 11). Though the tendency for independent museums to open for less of the year and to make greater use of voluntary staff may help explain this, there is a particular need to examine warding arrangements. For example, local authority warding staff and attendants normally receive enhanced pay for evening, weekend and bank holiday working, i.e. for working at the only times many members of the public can visit museums. Some local authority museums shut on Sundays and bank holidays rather than bear such costs.

49. The extension of compulsory competitive tendering under the Local Government Act 1988 to management of sport and leisure facilities is forcing a widespread and radical reappraisal

of staffing levels and practices in sports centres; local agreements and arrangements are being introduced. There may be an inevitable knock-on effect on other, leisure-related services such as museums. Individual councils will make their own decisions. Any reviews will, however, need to take account of safety requirements, security needs (particularly in art galleries and in museums holding collections of the fine and decorative arts) and to give due weight to the recommendations of the Museums and Galleries Commission's Security Adviser. Though it might make it more difficult to involve warding staff in customer care arrangements, there is also the possibility that CCT might be extended to warding services. It is worth noting that the British Museum sought tenders for its warding during the summer of 1990 but concluded that the retention of the in-house service was the most cost effective option.

CHARGING

50. Charging policies are likely to be reappraised in many authorities. Traditionally, admission to most public sector museums has been free. The introduction of admission charges at national museums in 1974 was the subject of much debate and was abandoned within a few months following a change in government. Several national museums have since re-introduced charging and a House of Commons Committee has recommended that all the national museums and galleries consider introducing charges.*

51. The proportion of local authority museums charging for admission has shown little change over the last five years. The median adult admission price at such local authority museums was £0.70 in 1989/90, though higher prices are charged at some major attractions aimed at the tourist and day tripper market (Exhibit 13). This compares with median charges of £2.00 at those national museums and £1.00 at other museums which charge.

Exhibit 13
ADULT ADMISSION PRICES AT LOCAL AUTHORITY MUSEUMS

Adult admission prices at those local authority museums which charge vary from 20p up to £4.50, but are usually £1 or less

Source: Audit Commission analysis of information in 'Museums Yearbook 1990–91'

52. Some museums charge for entry to special exhibitions, but retain free access to other public galleries and spaces. Others request visitors to make a voluntary donation on entry. Many museums also receive income from catering operations, retail outlets (shops) etc. Local authorities which charge for admission recover, on average, about 22% of their revenue expenditure on museums via admission fees and shop and catering income compared with about 11% recovered by those authorities which do not charge. The only two authorities receiving a net income from their museums service are charging for admission to nationally significant tourist attractions (the Roman Baths and Pump Room at Bath and York Castle Museum); York nevertheless offers local residents free admission to the Museum and does not charge for entry to the City Art Gallery.

53. Recorded admissions at the national museums have declined substantially when charging has been introduced (Exhibit 14). Recorded attendance at Southend's Central Museum fell by more than 50% when charging was introduced in the early 1980s and the practice was abandoned after about 18 months; donations also fell. Recorded attendance at Middlesbrough's Captain Cook Birthplace Museum is only about 50% of the level before charges were introduced. But figures should be treated with caution; museum visitor counting procedures vary widely, have no common or agreed criteria and often are not audited. It has been argued that comparisons of attendances before and after the introduction of charges are flawed; one set of figures is an estimate and the other accurate. And the figures say nothing of what might be described as the 'quality' of the visit.

Exhibit 14
ATTENDANCE AT ENGLISH NATIONAL MUSEUMS
Admission to all the national museums was free in 1979. Recorded attendances have declined at those which have since introduced charges

![Attendance Chart]

Source: Audit Commission analysis of data from 'Cultural Trends 4', Policy Studies Institute, 1989. Analysis excludes National Museums And Galleries on Merseyside. The Victoria and Albert Museum, which has a voluntary admission fee, is included in the 'Charging in 1988' category

54. Charging may alter the visitor profile; for example, the greatest decline in attendance at the Victoria and Albert Museum following the introduction of voluntary donations from visitors was by Londoners and those under 20 years of age. Any decision to levy charges should, therefore, be carefully justified, and the impact of the charges should be monitored.
SPONSORSHIP

55. The government encourages museums (and arts organisations) to attract sponsorship. Many local authorities are finding this difficult; on average sponsorship provides under one percent of museums' total income and over three quarters of local authority museum services receive nothing in this way. Many authorities also argue that sponsorship cannot be a substitute for long-term, core investment and support and point out that sponsors usually prefer to be associated with one-off events rather than facilities (e.g. to support an exhibition, not an existing gallery).

56. Sponsorship is not charity; sponsors are paying for services from the authority – for example, publicity, a contribution to their corporate image, and the ability to invite staff and clients to openings and private viewings. Many local authority museums are small, of only local interest and located away from the head offices where major companies' decisions about sponsorship are usually made. Failures to develop clear marketing strategies, which identify the benefits to offer sponsors and from whom to seek sponsorship, nevertheless contribute to the problems experienced.

EDUCATION REFORM

57. Local authority museums need to respond to education reform. The national curriculum emphasises practical experience, and schools may be willing to make use of museum services only where these serve the curriculum. The curriculum thus offers both the opportunity to market museum education services to schools which value practical experience, and to increase use of those services, and the threat that their use will fall if museums do not reappraise what they offer.

58. Education reform creates other challenges. Some museum education services are wholly or partly funded by the local education authority (e.g. Portsmouth's service which is supported by Hampshire County Council); in other cases, such as Leicestershire, the authority's own education budget contributes to museum costs. In every LEA, except those in inner London, the local management of schools provisions of the Education Reform Act 1988 mean that the majority of the schools budget is already allocated for spending at school level. Increasingly, control over schools' allocations is being transferred to governing bodies. Discretion to hold expenditure back from school-by-school allocation is being more tightly defined.

59. Responding to the national curriculum requires resources. Museums will need to obtain funds from alternative sources, if LEA support is withdrawn or reduced. Charging schools for admission and for other services is one option but museums will then be competing with teachers' salaries, book purchase and other expenditure within delegated budgets. This would accentuate the need for them to tailor their products to schools' requirements and to convince schools that they are receiving value for money. Decisions on charging schools for admission should however take account of the requirements of the Public Libraries and Museums Act 1964.*

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* S13 of the Act requires that a local authority shall take into account, if charging for admission, the need to secure that the museum or gallery plays its full role in the promotion of education in the area, and shall have particular regard to the interests of children and students.
MUSEUM REGISTRATION

60. The MGC introduced a registration scheme in Greater London and much of the north of England in 1988/9. It is being expanded on a region by region basis throughout the United Kingdom and will cover the whole country by April 1992. Provisional registration is offered to museums which do not meet full registration criteria but which are formally committed to achieving the standard. Bodies which are not accepted for, or do not seek, registration will have difficulty in claiming they are bona-fide museums. Registration, or provisional registration, will be a pre-condition for eligibility for grant aid from the MGC and Area Museum Councils* and for access to the conservation and other services they provide. Other funding bodies, including charitable trusts, may well treat registration as a pre-condition for their support; potential donors and people considering bequests may think similarly.

61. The Museums Association's definition of a museum lies at the heart of the registration scheme. Criteria for registration include the adoption of a formal collection management policy. This should cover the museum's acquisitions and disposals policy (including its definition of the subject areas, types of object etc., which it will and will not collect), documentation and conservation. Plans for dealing with documentation backlogs are also a prerequisite for registration. The scheme also requires that all reasonable steps be taken to preserve the collection. Museums seeking registration must therefore consider whether storage arrangements are adequate and what to do if they are not. Capital and revenue expenditure is needed in many authorities if registration criteria are to be met, emphasising just how important it is for museum services to justify their needs to their authority.

62. The Audit Commission welcomes the registration scheme, which has already catalysed important changes in the management and operation of local authority and other museums. Disposal and acquisition policies are being developed and attention paid to documentation backlogs and storage problems. Documentation officer posts are being advertised in publications such as the 'Museums Journal' and its 'Recruitment Supplement'; the Museum Documentation Association (MDA)** estimated, in mid-1990, that 400 to 500 UK museums of all types had begun computerising records of their collections, the majority using the MDA's MODES package. Some museums are, however, defining their collecting policy in terms of what they already hold, or believe they hold. Few are taking the opportunity to carry out a more fundamental reappraisal of the purposes of their museum. Acquisition and disposal policies are not always therefore being related to the services the museum is to provide and the people they are aimed at. The way to approach these and other issues is discussed in the next Chapter.

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* There are eight Area Museum Councils (AMCs) in England and Wales. They are financed by member subscriptions, payment for services they provide to museums and, in England, by grants provided by the MGC (with the Council of Museums in Wales receiving support from the Welsh Office). They provide grants to selected museums, usually to seed new developments and offer an external seal of approval to the initiative. AMCs will hold duplicates of the registration records.

** The Museum Documentation Association was founded in 1977. It undertakes research into documentation, publishes standards and recommendations and sells services to museums – training and manual and computer based documentation systems. It receives grant aid from the MGC.
3. What Needs to be Done

63. Many local authorities need to carry out a fundamental reappraisal of their support for museums. This should address the authority's objectives in supporting museums, the services to provide and at whom to aim them, collection management policies, management and operation of the service and performance monitoring. Business or development plans based on such reviews are already being used by some successful museums. There are also steps which central government and other bodies can take to help and encourage change.

A SYSTEMATIC APPROACH TO REVIEWING MUSEUM SERVICES

64. Authorities should reappraise their policies towards museums regularly, usually every three to five years. Some have already carried out such reviews, for example in Tyne and Wear and Portsmouth. Authorities first need to set overall objectives and then look at the way their services are managed to achieve them. Reviews need to be supplemented by briefer annual reappraisals.

OVERALL OBJECTIVES

65. Reviews should start by explicitly identifying:
— why the authority is supporting museums generally, and the objectives of each individual museum (e.g. to conserve the heritage for future generations, improve the quality of life, help economic development, encourage tourism, help with people's education). If an authority is supporting a number of museums, each may have its own niche;
— the people it is trying to serve. Are services to be directed towards local residents, the regional population or a wider national or even international tourist market? Are they to be targeted towards particular groups such as ethnic minorities or schoolchildren?

66. Much of the work involved can be regarded as a marketing analysis. Marketing is much more than advertising: it is market research and the whole process of deciding what services to provide, for whom to provide them, what, if anything, to charge and how to persuade people to use them. Good marketing plans also include measurable criteria of success or failure.

67. Once the overall objectives and those of each of the authority's own museums have been set, the authority can review the management of its in-house service. A systematic approach is required, reviewing each of the main aspects of the museum service and addressing the issues considered earlier (Exhibit 15 overleaf). Investment needs may be identified during a review. But major investment in a museum service should not be made until the authority is satisfied that the service has clear objectives, that performance is being monitored and that managerial arrangements are satisfactory.

COLLECTING

68. Work with the collection is not only essential to visitor and other services but can also be viewed as a service in its own right – preservation of objects for current and future generations.
at a cost which the local authority is prepared to bear. The scope and nature of the collection will help determine the range of the other services provided and the markets at which they are to be aimed. Some authorities may, however, need to alter the balance and focus of their collections to bring them into line with service priorities and the needs of target audiences.

69. In reviewing their approach to collecting, authorities should ensure that they have or are developing approaches which meet the criteria for registration under the MGC scheme and which are intended to support their overall policy objectives. Each local authority museum should therefore have a written collecting policy agreed by its authority. This should cover not only new acquisitions but include provisions for disposal of objects already in the collection. The criteria for disposal, and the procedures to use, should be clearly set out in this policy statement. The authority’s approach to accepting gifts should be covered explicitly as it can be difficult to subsequently dispose of gifts if they are held in trust. Some authorities now require that donors grant the authority the power of disposal or the power to subsequently return the object to the donor, at the authority’s discretion. There should also be a requirement to consider all the cost implications of any new acquisitions in advance as is already the case at the Victoria and Albert Museum. The ‘Cost of Collecting’ describes how this may be done.

70. Policies on acquisition should take account of the collecting policies of other authorities (as the MGC scheme recommends). Authorities should aim to identify county level, regional or national lead museums on particular subjects. Donors and other benefactors can be referred to these museums if they offer an authority material which lies outside its own collecting policy. Even if a museum exhibits material covering a particular topic, it might be able to rely on reserve and reference material held by a lead museum. Identifying lead museums will also make it easier to find a home for material which lies outside a new collecting policy and which an authority no longer requires. Transfers of objects and collection rationalisation will be easier.

71. Some authorities have already taken such initiatives. County museum officers who co-ordinate and support work by different museums are now common. Kirklees has agreements with other metropolitan districts in West Yorkshire about collecting interests. As a result it does
not, for example, have an industrial museum but does collect archaeological material from Calderdale. Despite such welcome initiatives there is more that many authorities could do.

72. The guidelines for the MGC registration scheme include a presumption against disposal. As the reaction within the museum world to Derbyshire's proposal to sell part of its art collection shows, disposal can generate considerable controversy. Disposals need, however, to be actively considered where objects lie outside the collecting policy, or where the authority lacks the resources to look after them. The Audit Commission recognises the importance of conserving the heritage and is not advocating asset stripping (sale simply to generate income). Though collection rationalisation may sometimes generate income, it will not always do so; though art galleries may hold valuable objects, much of the material in local authority museums is of low financial value. Income generation is not the primary purpose of rationalisation. Virtually anything can be collected and, if properly interpreted, be used to illustrate social history, industrial history, natural history or some other theme. The opportunities for collecting inexorably rise with social and technological change. Resources are finite and choices must be made. Collection rationalisation not only allows authorities to find better homes for objects but can free storage, conservation and other resources which can be used to acquire and look after new objects.

73. As the law now stands, it may not be possible to sell unwanted objects which are held in trust without ministerial consent. Where disposal is possible, authorities can offer to transfer objects to other museums which specialise in that subject. If the offer is declined the object's availability can be advertised to the museum community (e.g. in the 'Museums Journal') and sale or destruction considered only if transfer still proves impossible. These procedures are in line with Museums Association recommendations and the requirements of the MGC registration scheme. They ensure proper protection of the collection and provide powerful defences against asset stripping and against unthinking disposal of objects which subsequently prove of value or interest. Such defences are essential. Fashions and viewpoints change and objects, for example, ethnographic items, which were once seen as being of little interest are now viewed differently. The process is summarised at Exhibit 16 (overleaf).

STEWARDSHIP AND SCHOLARSHIP

74. The key questions authorities need to ask themselves are:
— are collections fully documented and location records accurate? If not, as is likely to be the case, how are we going to deal with any documentation backlogs?
— are collections properly stored and are security arrangements adequate?
— is there a clear research policy? How much effort should be expended on the research programme?

Some authorities have already addressed these issues. Birmingham, for example, is rationalising and improving its storage arrangements and implementing a computer based records system.

75. Documentation backlogs need to be addressed before decisions can be made about the future of some objects. An authority cannot decide whether an object contributes to a museum's objectives if it does not know where or what it is. It cannot dispose of an unwanted object if it cannot demonstrate full legal title.
76. There should be a designated collections manager to oversee all collections and be responsible for implementing the authority’s complete collection management policy within a delegated budget. The necessary support services – conservation, documentation and so on – can be provided either in-house, with the collections manager acting as ‘client’ in a service level agreement, or be bought in from the Area Museum Council or other sources. Co-operation between authorities, for example to provide good quality joint stores for their reserve collections,
can also be considered. The costs of such stores should, however, be recharged to their parent authorities and their costs taken account of whenever new acquisitions are considered.

ACCESS AND MARKETING

77. A marketing approach can be applied to most museum services, for example general visitor services (Exhibit 17) and loan services to schools (Exhibit 18 overleaf). Promotion is essential. It involves not simply advertising and publicity but customer care to ensure that visitors receive the advertised services and that these are of good quality. Displays need to be attractive and up to date.

Exhibit 17
VISITOR SERVICES
A marketing analysis, based on the ‘4Ps’, can help when reviewing visitor services

<table>
<thead>
<tr>
<th>Product</th>
<th>What services are we offering?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• what types of exhibition will be in our permanent displays</td>
</tr>
<tr>
<td></td>
<td>• themed</td>
</tr>
<tr>
<td></td>
<td>• multi-topic etc.?</td>
</tr>
<tr>
<td></td>
<td>• what use will we make of:</td>
</tr>
<tr>
<td></td>
<td>• special exhibitions of material from our reserve stores</td>
</tr>
<tr>
<td></td>
<td>• travelling exhibitions?</td>
</tr>
<tr>
<td></td>
<td>• what other services are we offering visitors</td>
</tr>
<tr>
<td></td>
<td>• catering</td>
</tr>
<tr>
<td></td>
<td>• information (lectures etc.)</td>
</tr>
<tr>
<td></td>
<td>• retail outlets (shops)?</td>
</tr>
</tbody>
</table>

| Place | What sort of visitors are we trying to attract |
|       | • local people |
|       | • day trippers/tourists |
|       | • schools |
|       | • minority groups etc.? |

| Price | What, if anything, do we want to charge visitors |
|       | • to permanent exhibitions |
|       | • to special or travelling exhibitions? |
|       | Do we want to make special arrangements for any user groups? |
|       | Are we going to charge for school visits? |
|       | What are our target users prepared to pay? |

| Promotion | Who will be responsible for market research, advertising, customer care etc.? |
|           | What promotion methods will we use? |
|           | How will we assess the cost effectiveness of our promotion? |
78. Used imaginatively, warding staff can make an important contribution to a museum's success. They need not simply provide security but can help with customer care, for example by answering visitors' questions and by carrying out routine cleaning and removal of litter. Glasgow City Council has negotiated changes in local terms and conditions which enable it to increase the opening hours of museums and to improve customer care. Conversely, in themed or working museums, other staff – for example craftspeople employed to demonstrate the use of equipment on display – may contribute to security.

79. A key issue affecting access is the authority's policy on charging. Decisions about whether to charge, and the prices to charge, should be based on a clear idea of the services the authority's museums are to provide and the groups in society at whom those services are aimed. It may, for example, be acceptable to charge for admission to a museum aimed at a tourist market, such as Portsmouth City Council's D-Day Museum, but not for entrance to a small local museum. Market research to identify who currently does and does not use museums is thus an essential input to the decision. A majority of local authorities have never carried out such research.

80. Over the country as a whole people from professional and managerial backgrounds are more likely to use museums than those from other sections of society (Exhibit 19). Some existing museum users can clearly, therefore, afford to pay for admission, but others may not. Charging can, however, be combined with measures to protect targeted or disadvantaged groups. The Museums Association has recommended that museums which charge should provide free admission on at least one day a week. Season tickets, discounts or free admission on proof of residence in the authority's area and targeted discount schemes ('Passports to Leisure'), such as those which are already widely used for sports facilities, are other possibilities. All children might be admitted free and free admission or discounts offered to bona fide students; failure to consider measures such as these might even be unlawful given the requirements of Section 13 of the 1964 Act.
81. If charges are introduced, it should be recognised that, other than in exceptional cases, they will not eliminate the need for subsidy. Their introduction is usually followed by a large drop in recorded attendances. This suggests that, at current admission prices, the universal introduction of admission charges would probably provide local authorities with only an extra £5 to £10 million a year, equivalent to about 10%, or less, of their net expenditure on museums. Charging may however be a worthwhile way of helping to generate funds needed to address problems with the collection and improve the services offered.

RENEWAL

82. Museums should avoid becoming moribund. A more positive approach, better marketing and customer care with minor redecoration and updating of displays will help. Complete redesigns of exhibitions and galleries are expensive but must be carried out from time to time. Rotation of objects between the galleries and the reserve collections can also help.

83. Museums may also need periodically to review their collections, acquiring new objects and disposing of unwanted ones, via the procedures outlined at Exhibit 16. Displays will need to be refreshed. Capital investment and revenue expenditure will be needed if many museums are to address problems with their collections. Sponsorship may make a contribution to improving services; a marketing analysis is needed, as part of the business plan (Exhibit 20 overleaf).

NEW MUSEUMS

84. A detailed feasibility study should be carried out whenever a new museum is planned. A clear collecting policy will be needed and the costs of collecting, including documentation, conservation, restoration and storage, identified. There should be a market analysis of the services to be provided and at whom they are to be aimed. Sensitivity analyses are needed to identify the financial consequences if visitor numbers are lower than anticipated and if income from admissions, if these are to be charged for, and from retail operations and catering is less than
expected. Capital costs require careful consideration. Converting an historic building into a museum may involve considerable expense, for example to provide work areas for conservation, to meet fire regulations and safety requirements or to provide toilet facilities.

**Exhibit 20**

**SPONSORSHIP**

Answering these questions can help authorities seeking sponsorship

<table>
<thead>
<tr>
<th>Product</th>
<th>What do sponsors find attractive?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>What are we offering potential sponsors</td>
</tr>
<tr>
<td></td>
<td>* publicity/corporate image</td>
</tr>
<tr>
<td></td>
<td>* corporate receptions etc.?</td>
</tr>
<tr>
<td>Place</td>
<td>Who are the potential sponsors</td>
</tr>
<tr>
<td></td>
<td>* locally</td>
</tr>
<tr>
<td></td>
<td>* nationally?</td>
</tr>
<tr>
<td>Price</td>
<td>What is it going to cost us to attract sponsors?</td>
</tr>
<tr>
<td></td>
<td>What is it going to cost us to provide them with what they want?</td>
</tr>
<tr>
<td></td>
<td>What are they prepared to offer us?</td>
</tr>
<tr>
<td>Promotion</td>
<td>Who will be responsible for:</td>
</tr>
<tr>
<td></td>
<td>* identifying what to offer</td>
</tr>
<tr>
<td></td>
<td>* identifying possible sponsors</td>
</tr>
<tr>
<td></td>
<td>* approaching them</td>
</tr>
<tr>
<td></td>
<td>* customer care and liaison with existing sponsors?</td>
</tr>
</tbody>
</table>

**OTHER PROVISION**

85. The review should not concentrate solely on in-house provision but also cover co-operation with other authorities and support for independent museums. Assistance should be targeted at those whose services, and user groups, contribute to meeting the authority's overall objectives. A quasi-contractual approach can be taken, with business and development plans, together with satisfactory performance in previous years, as a pre-condition for grant aid. Registration under the MGC scheme should also be a requirement.

86. Where the review has identified the need for additional museums, this may not automatically imply in-house provision. Support for an independent trust or other body may offer a realistic alternative. Transfer of an authority's existing museums to a trust may also be an option. Such trusts have advantages, for example freedom from local authority capital controls. They also have disadvantages; they may depend heavily on the enthusiasm and commitment of one or two individuals and face major problems if those people move on or lose interest or when they retire or die. Some museums have passed from trusts into local authority ownership to guarantee their survival (Exhibit 21).

87. Authorities supporting museums to help local tourism or with economic regeneration may occasionally compete with each other. Co-operation between neighbouring authorities, and Area Museum Councils, tourist boards and other bodies may produce a more attractive package; Portsmouth and other bodies have, for example, worked together to market a number of local museums (including HMS Victory, HMS Warrior, the Mary Rose, the D-Day Museum), as the 'Defence of the Realm'. Such possibilities should also be considered in a review.
MONITORING PERFORMANCE

88. Performance indicators should be used to compare achievement with objectives and to assess the efficiency and effectiveness of both the authority’s own museums and ones receiving grant aid. The indicators to be used should be identified in the review together with responsibilities for, and frequency of, collection. Quantifiable measures should be used wherever possible and compared with quantified targets. Some targets will, however, be qualitative or involve simple yes/no measures; for example registration under the MGC scheme might be a target. Appendix B lists some of the management information which can be used to measure the achievement of overall objectives and Exhibit 22 (overleaf) illustrates indicators for a selection of main museum service functions.

89. A structure for performance monitoring of visitor and educational services is given at Exhibit 23 overleaf. Indicators which might be used to monitor one of the services covered by that structure – the school loan service – appear at Exhibit 24 overleaf. Authorities may also draw upon the indicators being developed for the national museums and ideas being developed by the Museums Association, among others. The basket of indicators chosen will vary from authority to authority and museum to museum depending on the services being offered and the market segments at which they are aimed. Market research to identify visitor profiles and customer satisfaction will often be needed. Care will be necessary to ensure that information is accurate and reliable; many museums, particularly those with free admission, will need to improve the ways in which they collect, and check, attendance figures.

90. Indicators should be used selectively. Members and senior officers may need to see only a few core items, related to the authority’s most important objectives. Other indicators can be used to help line management with its day to day work or to diagnose problems revealed by the core indicators.
IMPLEMENTING A BUSINESS PLAN

91. The results of the review can be set out in a business or development plan for the service. The complexity and length of the review and of the plan will depend upon local circumstances. The work need not be a major, time consuming exercise in smaller museum services. Smaller services, in particular, may need to draw upon the marketing and other expertise of other parts of their authorities, for example from elsewhere in a multi-purpose leisure department. Larger services may need to use the same approach as Tyne and Wear and have a summary plan for the whole service and more detailed plans for each individual museum. Part of the development plan should be registration with the MGC, which will act as a catalyst for many of the changes required.

92. In preparing plans for in-house services particular attention needs to be paid to responsibilities for site management, collection management and staff training. Different sizes of museum service will apportion responsibilities in different ways; in small museums the curator may fill several rôles. There should be one person in each museum or art gallery with unambiguous responsibility for managing that site. Each site should also have a designated marketing manager. In some instances the site manager will fulfil this rôle; in others a marketing manager will report to the site manager. The site manager is responsible for the entire package of services the museum
Exhibit 23

PERFORMANCE MONITORING OF VISITOR AND EDUCATIONAL SERVICES

Each aspect of a function should have its own performance indicators

Exhibit 24

MONITORING A SCHOOL LOANS SERVICE

A range of measures can be used
provides. He or she should control budgets using these to obtain services from support staff and units – to allow the marketing manager to buy marketing support (e.g. from the authority’s tourism unit), to obtain warding, building cleaning and building maintenance services (e.g. from a site services unit), help in preparing displays and exhibitions (e.g. from keepers and a design unit), catering services (from a DSO or contractor) and so on (Exhibit 25).

**Exhibit 25**

**MANAGING A MUSEUM**

One approach is to designate someone as the manager for each museum

93. Some of these arrangements will be fully contractual. Catering and building cleaning are, for example, defined activities under the CCT provisions of the Local Government Act 1988; Area Museum Councils or other external contractors may help with exhibition design. Even when support is provided in-house, and is exempt from CCT, the site manager should have service level agreements with support units or staff.

94. Staffing levels and conditions of service may need to be reviewed, drawing on the experiences of other local authorities and the independent museums. New skills – staff management, marketing, display and other presentational skills – will often be needed; the Museum Training Institute is beginning to provide a framework within which skills can be developed. Training needs and a training programme therefore should be included in the plan. This should cover all museum staff; many authorities will, for example, wish to train warding staff to help implement customer care policies.

95. Other changes may be needed. Museums should not be charged for central services which they do not need, but may require improved support in other areas – for example on-line financial systems which include commitment accounting – if delegated budgets are to be managed in a businesslike way. A museum service should determine the support services it needs and then negotiate service level agreements with in-house suppliers (finance, personnel, legal
services etc). In principle it should be able to buy in services if in-house support is more expensive than that available from other suppliers.

96. Success should be recognised and rewarded. Museums which reduce their costs by good management or by increasing attendances or their net income from catering and retail operations should be allowed to invest at least some of the money in improved services or better care of the collection. Staff should be encouraged to meet and exceed financial and other targets via performance related pay.

**ACTION BY CENTRAL GOVERNMENT AND OTHER BODIES**

97. Business and development planning, museum registration, formal collecting policies and better documentation may result in many authorities identifying material which they do not wish to hold or which they cannot afford to look after. Transfers between museums may increase. But many local authority museums hold large amounts of similar and undocumented material. Many of these items are not rare – they include, for example, mass produced objects in social or industrial history collections – and are of limited cash value. Items of this sort, which are no longer required, may not always be wanted by other museums. The ability to manage collections is hampered by the legal problems in disposing of such unwanted objects. Central government can help by clarifying the law to give greater freedom to dispose by ways other than transfer. This should ensure continued stewardship by local government and prevent asset stripping but allow the appropriate disposal of duplicates and other unwanted objects. It would also help the development of rational collecting policies.

98. Museum professionals have understandable reservations about changing the law so that objects held in trust can be sold or simply thrown away. They argue that this may be unethical as it ignores the wishes of the donor, that it may deter people from offering objects in future and that it may lead to asset stripping to help meet an authority’s short term revenue needs.

99. Some objects held by local authorities are virtually useless for display while poor documentation limits their usefulness as aids to scholarship. Members might not always have realised that they were being asked to take on an open ended commitment when their museums accepted objects; insisting that their authorities look after such objects for ever may itself be ethically questionable. Many councils cannot now look after their collections properly and are, in effect, disposing by decomposition. The stores in which the collections are deteriorating nevertheless cost money, making this an expensive way to dispose of objects.

100. Changes in the law would release resources which could be used to acquire new, relevant objects or to improve museum services. One possibility is to allow authorities to dispose of objects donated subject to a trust before some chosen date (say 1950) but with any income received being used to fund additions to the collection. Past donations would still be helping the museum while future donors would then be assured that the legislation would not affect objects they offered. Full advance costing of acquisitions would mean that authorities understood the implications of accepting new gifts and were committed to their long-term preservation. Legislation could include defences against asset stripping. For example there might be a requirement to adhere to the disposal recommendations of the Museums Association and MGC (i.e. that objects must first be offered to other museums before other types of disposal are
considered); sale of potentially valuable items such as works of art which had been held in trust might require the agreement of the MGC or one of the national museums.

101. There are other changes which central government and other bodies such as the MGC might encourage. Although there are national museums, there is no museums policy for the country as a whole. It is difficult therefore to understand how resources are allocated between national and local authority museums or the roles they are expected to play. Museum collections differ from the book stocks of libraries, but can also be seen as vast stores of information. Though managed locally, with — rightly — great attention paid to local needs, in aggregate they are both substantial national assets. The library service provides for this to a greater extent: there are arrangements to avoid unnecessary replication of effort, and to share information around the system, to everyone's benefit.

102. Although the museum service has not yet matched the library service in this area, the position is improving, in response to museum registration and with the help of the recording systems developed by the Museum Documentation Association. Some work has been done in making collection information available at a regional and national level, particularly in the natural sciences. Some experimental work involving the storage and networking of object images and associated information is also underway. But much remains to be done and sustained long-term commitment and encouragement will be needed if the information in museums is to be made genuinely accessible, if collections are to be managed with a full understanding of their position in the national picture and if unnecessary collection of many similar items is to be avoided.

103. Authorities' willingness to transfer objects to other museums, and to stop holding those well represented in other collections, might be enhanced if there were a mechanism, possibly via the MGC registration scheme, for formally identifying lead museums for particular topics. The MGC, or some other co-ordinating body, might also establish a register of items which are available for transfer (or disposal) but have not yet found a new home. Greater use of long-term loans from national collections to local authorities, and of touring exhibitions of items from national collections, may make it easier for authorities to focus on particular topics in the knowledge that the public they serve have local access to a wider range of exhibitions and displays. Some steps in this direction have already been made. The OAL has funded the MGC's Travelling Exhibitions Unit and has asked that the national museums and galleries give details of their planned services to non-national museums, including loans, in the corporate plans due to be submitted to the OAL in the spring of 1991.

104. Continued support for training initiatives and career development for museum staff, including greater movement between local authority and national museums, should also help provide a still better service.
105. Museums and galleries not only conserve the heritage for current and future generations, they also make important contributions to the quality of life, support education, help to attract tourists and contribute to place marketing and the attraction of new investment to an area. Local authorities play an important rôle, and provide and operate the majority of public sector museums. They also provide grant aid to independent museums. The Audit Commission does not question their right to incur expenditure in this way. It is, however, concerned that authorities should be clear about why they are spending money, that they should monitor what they are achieving thereby and that they should use that money effectively. The Commission's auditors will be following up this report, examining arrangements in authorities in England and Wales during 1991.
<table>
<thead>
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<th>AUTHORITIES VISITED</th>
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<tr>
<td>Allerdale District Council</td>
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<td>Birmingham City Council</td>
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<td>Canterbury City Council</td>
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<td>Cotswold District Council</td>
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<td>Derbyshire County Council</td>
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<td>Glasgow City Council*</td>
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<td>Swansea City Council</td>
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<td>Thanet District Council</td>
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<tr>
<td>Tyne and Wear Museums Service**</td>
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<td>Wyre Forest District Council</td>
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* The Audit Commission has no responsibilities in Scotland. Glasgow was visited to provide comparisons with arrangements in England and Wales.

** The Tyne and Wear Museums Service is provided by a joint committee of the metropolitan districts in the former metropolitan county area.
## Appendix B

### MEASURING ACHIEVEMENT OF OBJECTIVES

The following may be used:

<table>
<thead>
<tr>
<th>Objective in supporting museums</th>
<th>Management information</th>
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<tbody>
<tr>
<td>Quality of life</td>
<td>The use made by the local population of services provided and supported by the authority (number of visitors/users living in its area; frequency of use; proportions of different segments of the population using the services). Wider market research to identify the public's: + views on quality of life in general + knowledge of and views about the service.</td>
</tr>
<tr>
<td>Promote tourism</td>
<td>Total number of tourists and day trippers visiting the area, lengths of stay and total expenditure in the area. Visitor surveys to identify why day trippers and tourists came to the area. Wider market surveys to identify the image people have of the area (and to check whether this is altering in ways sought in marketing plans). Surveys of people using the museums supported by the authority to identify how many are tourists or day trippers.</td>
</tr>
<tr>
<td>Encourage economic development</td>
<td>Total number of enquiries received, who makes those enquiries and the eventual result (i.e. whether investment takes place). Market research to establish why enquiries/investments were made. Wider market surveys to identify the image people have of the area (and whether this is altering in the ways sought in the marketing plan).</td>
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<tr>
<td>Support for scholarship and education</td>
<td>Number of organised school visits. Number of students in such parties. Number and proportion of educational institutions in the catchment area visiting the museum. Number of teacher and pupil packs distributed.</td>
</tr>
</tbody>
</table>
To conserve the heritage and protect primary evidence of local history etc.

Use of tutorial rooms.

Number of lectures, seminars etc at the museum.

Number of objects available for loan.

Parts of the national curriculum covered by the system.

Number of lectures given to learned societies.

Number of requests from scholars for access to the collection.

Number of publications produced.

Number of objects in the collection.

Acceptance for registration by the MGC.

Number and proportion of objects documented.

Progress in clearing documentation backlogs (e.g. number of objects documented during the year).

Number and proportion of objects held under suitable storage conditions.

Progress in providing suitable storage conditions (e.g. number and proportion of objects transferred to suitable stores during the year).

Number of acquisitions during the year.

Number of objects transferred to other museums.

Number of objects otherwise disposed of.

Whether new acquisitions conform to the authority’s collecting policy.