

**SCOTTISH
MUSEUMS
COUNCIL**



**From National Audit to National Framework:
SMC's response to the Scottish Executive Action
Plan Consultation**

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Executive Summary

From National Audit to National Framework

The Scottish Executive recognition of museums as a sector is a significant and most welcome development. It represents a clear advance on historic government policy and reflects the more holistic approach to Scotland's cultural heritage which was set out in the National Cultural Strategy. This now needs to be reflected in policy, funding and structures appropriate to 21st century Scotland.

The consultation process made clear that, for museums, funding and development of regional capacity are the priorities for any Action Plan. There was support for an expanded role for the national institutions and debate about the need for a new intermediary organisation, but the overriding concern was the need for core funding for core functions. The primary barriers preventing museums from fulfilling their core functions are inadequate resources and inadequate capacity. This urgently needs to be addressed. These barriers are in turn preventing museums from contributing to the wider cultural, social, educational, and economic agenda.

In framing our response, the Scottish Museums Council (SMC) has therefore developed recommendations which are realistic, but which do not completely accept the current tight constraints on structures and funding. Our recommendations address the fragmentation of policy, expenditure and accountability, the chronic lack of core funding and the adverse effects of years of under-investment in the sector. The recommendations require fundamental rethinking of approaches to museum provision at all levels and present a programme which will provide Scotland with a museum sector far better equipped to implement the vision of the National Cultural Strategy and fulfil the high expectations of the public in a devolved Scotland.

Core Funding

There is an over-riding need to ensure core funding for core museum functions, including learning. The role of local authorities is critical both in establishing good baseline provision for their own services and in recognising independent museums' contribution. The Scottish Executive should review grant aided expenditure (GAE) to local authorities in 2004-5, and consider ring-fencing funding streams to local authorities. To encourage consistency of provision, SMC should develop explicit models for core functions linked to the development of standards which make clear what is required by local authorities statutory obligation to "ensure adequate cultural facilities".

In addition, the Scottish Executive should identify resources from cross-departmental budgets for a targeted investment programme, administered by SMC, and outlined in the SMC response.

Regional Development

A key recommendation is the creation of a regional support infrastructure, through the establishment of 8 Regional Development posts, based locally but working across local authority boundaries and linked to central strategic support at SMC. The aim of these posts is to address chronic under capacity in the non national museum sector by assisting museums to forge external partnerships with social inclusion partnerships, tourism bodies,

learning providers, enterprise networks and to collaborate with other museums on joint funding applications and other initiatives including the development of regional networks.

Strategic Change Fund

The Strategic Change Fund should be evaluated by December 2003. It may then be consolidated as part of the costed investment programme. Meanwhile, SMC should continue its proactive approach, encouraging innovative partnerships.

Buildings

Urgent action is required from the Scottish Executive, Historic Scotland, SMC, local authorities and the Heritage Lottery Fund to identify and address the capital requirements of museums in listed buildings to ensure the widest possible access. Historic Scotland should identify a budget to meet the capital repair costs of museums in listed buildings, prioritising those museums where the building and collection together represent an outstanding cultural asset, which should be preserved in context. SMC should work with the Royal Incorporation of Architects in Scotland on the development of design quality indicators for museum buildings, and with Historic Scotland to prepare guidance and advice on adapting historic buildings for museum use.

Emergency or stabilisation funding

Until the Scottish Executive has established a coherent national framework, there will remain a short term imperative to fund independent museums in crisis. The Scottish Executive should, therefore, continue to fund the 3 industrials up to 2005, and should also commit a further £300,000 pa for other independent museums with important collections, in the same position. The Scottish Executive should evaluate by September 2004 and decide whether it will continue direct revenue funding for non national museums.

Building Capacity

The quality, efficiency and effectiveness of both museums' core delivery and their wider contribution depend on an increase in capacity, particularly in the non-national museum sector. There are four dimensions to this:

- **Increasing staff numbers and developing new skills.** For non-national museums, an increase in the number of subject-specialist 'collection- less' curators, and in the number of education staff is the key to increasing access to museums. The Scottish Executive, SMC and museum employers need to ensure an effective Sector Skills Council (SSC) for cultural heritage in Scotland. Training and skills development needs to take account of the volunteer workforce, and offer equal opportunities to paid and unpaid staff. Programmes should be developed to address key training needs, for example in relation to museum leadership and governance.
- **Partnership.** There is considerable potential for more effective partnership between national and non-national museums, which should be based on a 'parity of esteem' and museum needs. For example, curatorial advice might be delivered through networks of national and non-national curators, and a Travelling Exhibition Fund could encourage greater access to Scotland's treasures. Partnership between museums and other bodies would be greatly enhanced by the appointment of Regional Development Officers.

- **Developing ICT.** Investment in ICT could transform collections management, the visitor experience and the promotion of museums to wide audiences. SMC should lead on reviewing and implementing the ICT Strategy, which should secure the public role of SCRAN, and explore the provision of broad-band capacity for museums.
- **Raising standards.** SMC questions whether the Resource Registration scheme provides a necessary tool for measuring improvements in performance, and suggests Scotland needs to explore appropriate options. Audit Scotland, SMC and local authorities should review LA performance indicators, which need to extend beyond visitor numbers and number of registered museums. In particular, Scottish museums need a mechanism for assessing learning and access. VisitScotland and SMC need to work together to promote museum membership of the Visitor Attraction Grading scheme.

New Museum Development

The significant growth in the number of visitor attractions in Scotland, without a corresponding growth in visitor numbers raises serious questions about sustainability. Local Authority planning and economic development departments, LECs and HLF need to involve SMC and local cultural services at an early stage when considering potential new museum developments. Museums, historical societies, LECS and others need to consider alternative sustainable options for interpretation of cultural heritage, which may not be capital and cost-intensive.

Stewardship of the Cultural Heritage

To a large extent, stewardship remains the 'hidden burden,' which museums carry. It involves the conservation, documentation, management and interpretation of the 12 million objects, which make up Scotland's distributed national collection. A key priority should be the reduction of Scotland's massive documentation backlog, through the development and implementation by SMC of a national documentation strategy. It should be complemented by regional and national collections policies, which adopt a strategic approach to the gaps and strengths in the distributed national collection. The National Museums and National Galleries should develop policies and allocate resources to the provision of security and subject specialist advice. NMS should take over delivery of a national conservation service from SMC.

Learning and Access

Museums see the provision of opportunities for lifelong learning as fundamental to their core mission, but this is not always recognised by other learning providers or by learners themselves. An increase in the numbers of education staff in non-national museums and core budgets are pre-requisite to the delivery of improved services. A cross-sectoral committee, comprising SMC, Learning Teaching Scotland, Communities Scotland, Youthlink and other relevant bodies should develop and implement a national learning and access strategy. This would improve links between museums and other parts of the learning sector, increasing museums' profile in schemes such as the Cultural Co-ordinators scheme. SMC should develop museums' input to training and Continuous Professional development for teachers and community education workers, and should further develop learning support and advisory services for the sector. There is considerable scope for promoting and developing the work of museums in Social Inclusion Partnership areas through cross sectoral partnerships, particularly if critical gaps in capacity and skills are addressed.

In addition there is a need to build new audiences by addressing existing physical, economic, social and psychological barriers to access. Better research is needed, for example, on museum attendance and non-attendance to inform policy, advice, guidance and training. The Scottish Executive should also review the statutory framework for museums, and particularly anomalies in relation to admission charges and VAT recovery.

Volunteers

The Scottish Executive should recognise the important contribution of volunteers to the museum sector. SMC, the Sector Skills Council, Volunteer Development Scotland and the Scottish Council for Voluntary Organisations should develop guidance and training for volunteers, and for museums working with volunteers.

Tourism

The Action Plan presents an opportunity for VisitScotland and SMC to work together to co-ordinate national strategies for tourism and museums, allowing more effective marketing of museums and better understanding of what visitors want. SMC should commission research into direct and indirect economic impact of museums. Regional Development posts working across Local Authority boundaries will assist museums to play a full part in local tourism initiatives, encouraging joint marketing and interpretive strategies where appropriate.

Roles and Structures

A new national framework for museums should clearly identify the respective roles of the Scottish Executive, the National Museums and Galleries, Local Authorities, the Scottish Museums Council, Resource and Historic Scotland. Principles of transparency, stakeholder input and accountability should underpin the framework. The Scottish Executive's role should be to develop and invest in the framework, championing museums' contribution to other parts of Government.

There should be a managed transition to a new national agency, responsible for strategic development of the sector as a whole. This body would work closely with Local Authorities taking a regional development approach to realising museums' potential. Unless and until a new agency is established (which SMC recommends by April 2006), the Scottish Executive should formally acknowledge and appropriately fund the Scottish Museums Council as the national development agency. The National Museums and Galleries should play an enhanced role in the development and delivery of curatorial services for all museums. Post-devolution, the role of Resource in Scotland requires clear definition to ensure value for money and impact. The Action Plan for Museums should also identify the role of the Heritage Lottery Fund in supporting museums in Scotland.

1 Introduction

- 1.1 The Scottish Executive recognition of museums as a sector is a significant and most welcome development. It represents a clear advance on historic government policy and reflects the more holistic approach to Scotland's cultural heritage which was set out in the National Cultural Strategy. This now needs to be reflected in policy, funding and structures appropriate to 21st century Scotland.
- 1.2 The starting point for the Scottish Executive consultation is the publication of the National Audit. The Audit was not intended to provide a national framework or prescriptive recommendations for action. It was designed to provide an authoritative picture of the sector which would provide the platform for evidence based policy and funding decisions. SMC concludes that the Audit:
- demonstrates the strengths and weaknesses of historic policies and funding patterns
 - provides convincing evidence of the Distributed National Collection
 - demonstrates the need for a clear national framework
 - demonstrates the need for an investment programme to secure the future of Scotland's cultural heritage.
- 1.3 At the request of the Scottish Executive, SMC led the consultation process. Details of the consultation are attached and summaries of various workshops together with full speeches from the 4 November conference are posted on our web site www.scottishmuseums.org.uk. This response is informed by the consultation process but is not a summary of the consultation: it represents a response by SMC as the organisation recognised by Ministers as their main adviser and channel for funding to non national museums in Scotland.
- 1.4 In his consultation letter the Minister has referred to the need for "realistic options" including recognition of the role and contribution of many partners. He indicated the Action Plan will have to recognise the practical constraints of funding and take account of issues of sustainable funding and structures. The overwhelming message from the consultation was that the consultation and any Action Plan would be a hollow exercise if additional resources are not identified. It is certainly true that there is room for greater efficiencies, particularly through co-operation and better working partnerships, but it is unrealistic to imagine that development or sustainability can be achieved without additional investment in the sector.
- 1.5 The consultation process made clear that, for museums, funding and development of regional capacity are the priorities for any Action Plan. There was support for an expanded role for the national institutions and debate about the need for a new intermediary organisation, but the overriding concern was the need for core funding for core functions. The primary barriers preventing museums from fulfilling their core functions are inadequate resources and capacity: this urgently needs to be addressed. These barriers are in turn preventing museums from contributing to the wider cultural, social, educational, and economic agenda.

- 1.6 In framing our response, SMC has therefore developed recommendations which are realistic, but which do not completely accept the current tight constraints on structures and funding. Our recommendations address the fragmentation of policy, expenditure and accountability, the chronic lack of core funding and the adverse effects of years of under-investment in the sector. The recommendations require fundamental rethinking of approaches to museum provision at all levels and present a programme which will provide Scotland with a museum sector far better equipped to implement the vision of the National Cultural Strategy and fulfil the high expectations of the public in a devolved Scotland.

2 A Common Purpose

2.1 Museums' Purpose

The diversity of the museum sector in Scotland has led some to question whether museums have a common purpose. Despite very real differences in size, governance, staffing, and funding arrangements, SMC is clear that museums do have a unifying sense of purpose. This is best encompassed in the Museums Association's definition of a museum, which equally describes the aspirations of the National Museum of Scotland and the smallest independent, volunteer-run facility:

Museums enable people to explore collections for inspiration, learning and enjoyment. They are institutions that collect, safeguard and make accessible artefacts and specimens, which they hold in trust for society.

Museums are distinguished from other forms of visitor attraction because they place real objects and collections, our material culture and heritage, at their heart. This definition describes museums' duty of stewardship, the development and preservation of collections – the care of the 12 million objects, which make up Scotland's distributed national collection. To a large extent, stewardship remains the 'hidden burden,' which the museum carries. It involves the conservation, documentation, management and interpretation of the objects held in a museum, as well as the secure maintenance of the buildings – many themselves historically significant - in which collections are housed and presented.

Equally important, however, is the recognition that museums have a core duty to provide access to their collections for present and future generations. Providing access in this sense is not a passive activity, but an active engagement with the many ways in which people learn about the past, themselves and the world in which they live. To do this effectively museums must be creative and dynamic, and they cannot work alone. They need to link not only with audiences, but with a wide range of partners including those in the formal and informal learning sectors, the voluntary sector, social inclusion partnerships, community groups and others. If museums are to survive in the long-term, they must also consider future audiences. In particular, improved knowledge and understanding of why people do and do not attend museums should inform future strategies.

This engagement with visitors also has an essential economic dimension - how people choose to spend their leisure time has a critical impact on viability where nearly 20% of a museums' budget is derived from admission charges. Museums are an important part of Scotland's tourism infrastructure attracting 13 million visitors, and directly spending £16.7 million each year. There is a continuing and urgent need to calculate the indirect economic impact of museums as part of the wider tourist economy to ensure appropriate investment. In addition, 10,000 people work in Scottish museums, over half of those voluntarily, representing a significant part of Scotland's social economy.

The National Audit and subsequent consultation have highlighted the pressures placed on museums to fulfil stewardship, social and economic roles, and the

degree to which they are under-resourced to do so at the present time. The current lack of a coherent museums framework or strategy, coupled with widespread shortfalls in core funding, has meant that museums have prioritised roles differently, often to draw in funding from whatever source. Few museums, if any, have been able to sustain their role or vision across the full spectrum of desired museum activities to a high standard over time.

The Action Plan provides the opportunity for the Scottish Executive to lead the way in recognising the importance of museums' common purpose for the cultural life of Scotland.

3 Funding and Sustainability

The Context

- 3.1 A key **objective** of the Action Plan should be to reform historic funding patterns at national and local level in order to create a sustainable national framework. The requirements set out in the National Strategy¹, and endorsed by the Education and Culture Committee of the Scottish Parliament, are:
- to secure the future of nationally important collections which are not currently the responsibility of the National Museums or National Galleries.
 - to ensure a stable revenue funding base for a network of museums, including non national museums as well as the National Museums and Galleries.
- 3.2 The Audit demonstrates the complexity of the funding landscape and clearly concludes that sustainable funding solutions for most museums require identified core funding for core museum services, including basic stewardship. In the absence of such core funding, core museum services are at risk and in extreme cases the museum organisation itself may be at risk. This is consistent with the previous studies of individual museums in Scotland including the SMC report on industrial museums². It is also consistent with the position in England as shown in the recent Resource report *Renaissance in the Regions*³.
- 3.3 The need for core funding for core functions was also the overriding message to emerge from the consultation. Project and challenge funding are not a sustainable long term solution to the funding problems which are so evident in the sector.
- 3.4 Local authorities are critical to the delivery of museum services in Scotland and have a statutory duty to “ensure adequate cultural facilities” – a phrase which is not defined in legislation or in any guidelines⁴. However the Audit demonstrates the unevenness of provision, which is a reflection of historic funding patterns. The 1999/2000 Cosla survey demonstrates the spectrum of local authorities commitment. Glasgow alone is responsible for 43% of local authority expenditure, and spends £25.35 pounds per head. At the other end of the spectrum, 5 local authorities spend under £1 per head⁵. Even on these figures, there has been a recognition that there is a need for further investment in Glasgow’s services and the Scottish Executive have provided a grant of £3,000,000, recognising the

¹ *A National Strategy for Scotland’s Museums*, Scottish Museums Council, 1999

² *A Review of Scotland’s Industrial Museums and Heritage Sites*, Scottish Museums Council, 2000

³ *Renaissance in the Regions: A New Vision for England’s Museums*, Resource, 2001

⁴ 1887 Public Libraries Consolidation (Scotland) Act

⁵ Confusingly the latest (2002-3) CIPFA estimates give a Glasgow figure of 30% and £18.68 – see recommendations in 7.26.

importance of the historic buildings and the potential contribution of the museum service to cultural tourism and education.

- 3.5 In other words, Glasgow is the exception rather than the rule. Other authorities lack Glasgow's capacity and/or commitment and have not benefited from direct Scottish Executive funding. Grant aid expenditure (GAE) for museums is based on past expenditure rather than any formal model or standards. Existing GAE therefore perpetuates historic funding patterns which, as the evidence has shown, are inadequate. There is therefore a need to address the whole issue of local authority cultural spend from a range of different perspectives.
- 3.6 There has been considerable Scottish interest in the English Renaissance in the Regions report, endorsed and funded by DCMS, which will deliver a programme of regional investment via a series of 'hub' museums. It is important to note that investment in 'hubs' is only one element of central government investment in English museums. Central government investment includes:
- DCMS funds a series of museums directly. These include both the statutory national institutions and selected individual museums eg Tyne & Wear Museums. There are detailed funding agreements published on the DCMS web site.
 - DCMS funds Resource, a NDPB as its policy and development intermediary.
 - Resource in turn funds a series of Regional Agencies to replace the previous Area Museum Councils. These Agencies have a cross domain remit of museums, libraries and archives. Some of the new RA's maintain a membership base, most do not.
 - Resource will be funding a series of museum hubs. The intention was these should provide pastoral care for spokes. However the full programme is now to proceed only in phases and Resource is faced with the difficult decision of where to pilot the model.
 - Resource also provides funding for collections care via the Designation Fund for nationally significant or 'designated' collections. The hubs must include at least one designated collection, but not all designated collections are included in hubs.
 - DCMS is not the only funder: other government departments, particularly DfES, provide significant funding.

Core Funding

- 3.7 There is a clear need for a targeted investment programme which can address something of the historic legacy, but a short term investment programme does not address the long term. A costed investment programme in isolation will not be sufficient and the Scottish Executive Action Plan needs to address the underlying issue of core funding for core functions.

- 3.8 Stewardship of the collections is the most basic function of museums and the National Audit identified the wealth of collections across Scotland and the extent to which the quality of Stewardship varies across type of museum, size of museum, geography and different functions whether this be conservation, display, interpretation, provision of educational services or broader outreach programmes. These are considered in more detail later in the submission. However funding for core functions also needs to address the need to maintain a cycle of reinvestment in displays and above all the need to adapt historic buildings to meet the requirements of the Disability Discrimination Act and to address the heavy burden of maintenance of historic buildings. The National Audit highlighted the importance of the relationship between buildings and collections and the fact that in many cases the sum of the buildings and their collections taken together is greater than the constituent parts.⁶
- 3.9 In England, following the introduction of the designation scheme, an investment programme is resulting in approved stewardship of designated collections. However as identified this is only one element of central government investment, and relevance to Scotland depends on whether the Scottish Executive wishes to link investment explicitly to significant collections, or to the wider cultural, social, economic and educational agenda (or a combination of both). Mechanisms to target resources at the most important collections therefore require reappraisal of whether Scotland needs a Designation Scheme, starting with (but not limited to) a review of the largest collections identified in table 47 of the National Audit.
- 3.10 Independent museums are in many cases delivering valuable public services, undertaking stewardship of the collections and buildings of national importance and providing important social services. With one or two exceptions, few funders recognise the full cost of delivery including overheads and the cost of contract compliance. Investment to create a sustainable network of museums must acknowledge the undertaking of core functions as part of the true cost of service delivery. This will increasingly be a feature of local authorities duty to identify best value within their own services and within their own grant aid programmes.
- 3.11 Recommendations
- a. The Scottish Executive reviews GAE in 2004-5.
 - b. In reviewing GAE, the Scottish Executive considers ring fencing funding streams for local authorities, linked to the regional development approach.
 - c. SMC develops explicit models for core functions. Modelling should be linked to the development of adequacy standards in parallel with the review of GAE.
 - d. The Scottish Executive with SMC reviews the relevance of Designation for Scotland.

⁶ *National Audit p32*, Scottish Museums Council, 2002

- e. The Scottish Executive reviews its direct funding arrangements for individual museums.
- f. Historic Scotland identifies a budget to meet the capital repair costs of museums in listed buildings, prioritising those museums where the building and collection together represent an outstanding cultural asset, both of which should be preserved in context.
- g. The Scottish Executive leads a Task Force including Historic Scotland, local authorities, SMC and the Heritage Lottery Fund to review overall capital requirements and how these can be addressed.

Investing in regional development infrastructure

- 3.12 Until now, regional support in Scotland has been delivered from SMC, modelled on the UK-concept of one Area Museum Council in each region or home country. Scotland lacks a regional infrastructure equivalent to the existing or proposed structure in England that bridges the gap between national and local support, and this in turn affects the capacity of the sector to deliver. The consultation has identified strong support for taking a regional development approach in Scotland. The value of providing such support was demonstrated recently in the Highlands and Islands Enterprise (HIE) area by the temporary Museums Officer post jointly funded by HIE and SMC which stands as a possible model for future regional museum development.
- 3.13 Introduction of the 'hubs' model on an English scale would seem a poor fit for a country with a geography of large rural expanses with few centres of population, contrasting starkly with a densely populated central belt centred on the Edinburgh and Glasgow axis. Our view is that a more appropriate approach is to focus on regional development rather than an hierarchical framework. This is a more flexible approach which can adapt to local circumstances, particularly important if community planning is to be a key driver of local cultural provision.
- 3.14 A regional development for Scotland requires a new regional infrastructure for museums involving partnership between groups of local authorities, through which funding and support services would be channelled. SMC proposes an infrastructure that would link into SMC or its successor agency via a new regional development co-ordinator in SMC. Regional posts would be funded by the Scottish Executive (not necessarily the education department) via SMC or its successor.
- 3.15 While some consultees thought it would be more efficient to simply channel more national funding directly to local authorities rather than through more intermediaries, SMC considers the regional collaborative approach linked directly to central support will be more effective and more likely to encourage the creation of effective partnerships by drawing in other funding sources.
- 3.16 The Regional Development networks is a fundamental strand of SMC's proposed investment programme. Detailed proposals for regional development are outlined under capacity building in section 5.

3.17 Recommendations

- a. SMC leads on consultation and design for creation of a new regional development infrastructure.

Stabilisation

- 3.18 A complicating factor in the funding debate is the current Scottish Executive funding of 3 industrial museums. This package is due to finish in April 2004: allowing for adequate planning this suggests the industrials need to know whether the funding is to continue no later than September 2003. The funding has essentially been for stabilisation: the 3 museums have undertaken some interesting joint activity and have been able to make incremental improvements but the underlying fact is that even this stabilisation funding does not cover an appropriate budget for museums with such significant collections and cost intensive buildings. Other independent museums which have not received stabilisation funding are, not surprisingly, even closer to the edge and these include independent museums with nationally important collections and buildings such as Dundee Industrial Heritage Trust, Wanlockhead and the iconic collection at the Burns Birthplace Museum.

We recommend a pragmatic solution which allows the Scottish Executive to develop a viable exit or continuation strategy to fit within the new framework that should be developed as a result of the Action Plan. The pragmatic solution may be criticised in that it continues to privilege some museums above others, but the adoption of a transparent process would go some way to addressing the unfortunate legacy of the previous process. The recommendations taken together also support the migration strategy towards a new agency (see 7.5 and 7.6).

3.19 Recommendations

- a. The Scottish Executive commits to funding the 3 industrial museums at the same level for a further year to April 2005, pending evaluation.
- b. The Scottish Executive provides emergency funding of £300,000 pa to April 2005 for other independent museums in financial difficulty. The criteria should be clearly defined, and should be linked to nationally significant collections within the Distributed National Collection.
- c. The Scottish Executive commissions an evaluation of the direct funding arrangements for non national museums for April 2004.
- d. The Scottish Executive develops a continuation or exit strategy by September 2004, although we emphasise at this point we cannot envisage a continuation or exit strategy which does not involve substantial future funding in some form.
- e. Future Scottish Executive direct funding meets clear criteria and is linked to standards.

- f. The exit strategy from Scottish Executive direct funding may see future funding delivered by the SMC or its successor post 2005.

Strategic Change Fund

- 3.20 There is a need to distinguish between the Strategic Change Fund allocation to the industrials, discussed above, and the Strategic Change Fund administered by SMC. For the Strategic Change “challenge fund” the process of consultation with SMC members was an important part of the strategic change process and marked a significant development in sectoral thinking. Museums adopted a very mature approach to use of the fund and were impressive in their overwhelming message that the awards should concentrate on a limited number of high impact schemes with a wider applicability for the sector, rather than any per capita distribution. This enables the fund to be used in a genuinely strategic fashion.
- 3.21 Throughout the consultation there was support for investment to continue via this route, but at the same time recognition of some practical difficulties. Some early conclusions on the basis of our interim evaluation indicate that the timescale was and remains very challenging, particularly for local authorities. SMC adopted a proactive approach of brokering partnerships, encouraging applications and assigning independent consultants to assist applicants in developing some more complex projects. The long lead in time and proactive approach has begun to pay dividends and we are seeing some particularly exciting and innovative partnerships coming through to the second round. However the clearest message of all to emerge from the Strategic Change Fund process, as from the current consultation, is the extent to which lack of capacity inhibits members ability to develop new approaches and particularly to establish effective working partnerships.
- 3.22 Administration of the scheme has presented some challenges for SMC while we have been simultaneously consulting on the National Audit, on the development of the Registration Scheme and of the Learning and Access Framework as well as our more routine advice and support. There would be significant resource implications if staff were to be drawn into detailed project management, evaluation and support on an ongoing basis as well as advising and encouraging applications.
- 3.23 Recommendations
 - a. SMC continues to take a proactive approach and to use consultants to assist applicants to the Strategic Change Fund.
 - b. SMC evaluates the Strategic Change Fund scheme by December 2003.
 - c. From 2004 funding should be available through SMC at least at the same level as the Strategic Change Fund, but may well be consolidated as part of the costed investment programme depending on the outcome of the evaluation.

Heritage Lottery Fund

- 3.24 The Heritage Lottery Fund has been critical to the development of the museum sector in Scotland over the last 7 years. Despite a fall in revenue, and a change in

emphasis, we believe HLF funding will continue to be a significant feature of the museum landscape. Our comments on HLF as it currently operates are set out in

- i. the joint response to the current DCMS consultation, which the SMC Director drafted on behalf of a number of the cultural heritage agencies. This dealt with aspects of policy including the principle of additionality and
- ii. our individual response which deal with more operational matters⁷.

3.25 Recommendations

- a. HLF Strategy for Scotland is developed to take account of the National Action Plan for Museums.
- b. The Action Plan for Museums identifies the role that HLF should play in supporting museums in Scotland.

Targeted Investment

- 3.26 In order to address the legacy of under investment, there is an urgent need for a sustained investment programme, funded to deliver identified outcomes. The programme should be funded by the Scottish Executive to deliver outcomes which are tied to national objectives. Many of these objectives cross departmental boundaries, we recommend that the education department should facilitate and co-ordinate an investment programme which is funded across departmental budgets.

SMC, and in due course its successor would be the vehicle for the investment programme, with agreed milestones and intended outcomes incorporated as part of the programme design. The design and implementation should aim to secure sustained commitment from other partners, particularly local authorities and universities.

- 3.27 An outline investment programme is attached with indicative costings. The programme incorporates recommendations which are explored in detail in the rest of the submission. Full implementation of a sustained long term investment plan cannot be costed at this point, but the programme includes costings to undertake research and design of national initiatives where appropriate. Some of the recommendations are existing proposals, some are new initiatives, but all are designed to make a critical difference to the future of museums and galleries in Scotland and the services they can provide for users.

3.28 Recommendations

- a. The Scottish Executive facilitates and co-ordinates the outline investment programme on a cross departmental basis.
- b. Design and implementation aims to secure sustained commitment from other partners particularly local authorities and universities.

⁷ www.scottishmuseums.org.uk/pdfs/Lottery-review-response.pdf

4 Stewardship of the cultural heritage

Introduction

- 4.1 A key **objective** of the Action Plan should be to secure the stewardship of the distributed national collection to the highest possible standards.
- 4.2 Collections are the lifeblood of museums and the distributed nature of Scotland's collections ensures geographical spread of access to them and of their contribution to wider social, educational and economic agendas. Many of Scotland's important collections belong in situ because they have a close association with particular places: for example shawls for Paisley, Discovery for Dundee, Charles Rennie Mackintosh for Glasgow. Others belong in context with historic buildings that are an integral part of landscapes and townscapes, such as the Museum of Lead Mining at Wanlockhead and the Museum of Fire in Edinburgh. Collections in context include those of museums built for purpose in the 19th century and now mostly in Local Authority hands such as Aberdeen Art Gallery, Perth Museum and Art Gallery, the Dick Institute, of the major universities. The University of Glasgow's Hunterian Museum is Scotland's first public museum.
- 4.3 A distributed national collection requires sustainable networks of support. Local authority museum professionals already contribute voluntarily to collaborative networks, for example acting as Curatorial Advisers for independent museums under the Resource Registration Scheme, by contributing to Regional Museum Forums, and by contributing to the work of UK wide subject-specialist groups such as the Social History Curators Group. SMC supports the first two of these, and recognises the degree to which voluntary schemes both make an essential contribution and are currently inadequate for needs. The lack of formal support through Local Authority Museum Development Officers or Regional Development Officers (see 3.12-3.17 and 5.4-5.7) means these voluntary networks are currently stretched beyond their limits.
- 4.4 There are real possibilities for joint collaboration between national and non-national museums and galleries in subject specialist areas. The consultation process has shown that museum professionals share a vision for national as well as regional collaboration, recognise the voluntary contribution national staff already make in subject-specialist areas and are enthusiastic about collaboration in equal partnerships for the greater good.

Improving collections knowledge and management

- 4.5 The consultation revealed a strong collective wish to maximise the potential of collections for the public, and real frustration that deficiencies in the capture and management of knowledge about museum objects prevents this. Documentation backlogs and the need to modernise systems were cited as the main barriers to managing collections efficiently and effectively, to making knowledge about them publicly accessible (at museum sites and remotely) and to being able to rationalise collecting.

- 4.6 Those consulted indicated they want to collaborate to overcome the problem collectively. There is strong support for a prescriptive solution in the form of a national documentation strategy. Museums do not want more advice, but seek clear direction and want the capacity to implement to overcome barriers quickly and effectively. Four elements have been identified: directive guidance; people on the ground to input information; access to specialist expertise to inform the knowledge content and modern computer software. These elements should be made available on a Scotland-wide basis within a strategic framework and the approach should follow the excellent cross-domain UK-wide guidance recently published in the *Full Disclosure Prioritisation Study Final Report*⁸.
- 4.7 The design and development of the strategy would be informed by options for backlog reduction (already in SMC's corporate plan for Sept 2003), and any relevant exemplar projects supported under the Strategic Change Fund. This should be followed by costing a programme for implementation, securing funding and funding partners (ideally including HLF) with the aim of the implementation programme starting in 2006.
- 4.8 Recommendation:
- a. SMC leads on developing a national documentation strategy as a matter of priority based on the principles of the *Full Disclosure Prioritisation Study Final Report*.

Subject specialist advice

- 4.9 The consultation highlighted the importance of mechanisms whereby all museums can have access to 'curatorial' expertise in the form of specialist subject knowledge. The National Museums and National Galleries were cited as the principal source for such advice and there was praise for the help and assistance of curatorial staff in the nationals when responding to requests for advice about objects and collections. While those consulted were convinced such advice should be available, they are not agreed on what it constitutes. Although generally understood to mean opinions on origin and significance, the content of this advice and the depth and level of what should be freely given (or that warrants paid research) needs to be defined. Currently, advice from the nationals is delivered unevenly on an ad hoc basis without a policy framework or mediation.
- 4.10 The nationals are not the only source of subject specialist advice nor is it desirable they should be. There is also a wealth of knowledge amongst local authority curators, academics, volunteers and local historical societies. Network solutions that utilise all resources were seen to be the way forward: this had been a recommendation of the National Strategy and is even more realistic now that information is increasingly available through ICT enabled solutions. The barrier to maximising the potential of network solutions is the low uptake and uneven distribution of ICT demonstrated clearly by the National Audit.

⁸ *Full Disclosure Prioritisation Study Final Report*, Cultural Heritage Consortium on behalf of the British Library, <http://www.bl.uk/concord/fulldisc-prior.html>, 2002

- 4.11 To have maximum impact, subject-specialist advice from the nationals needs to be targeted where it is most needed and of greatest value to the distributed national collection. Future additional provision of opinions on significance of objects and collections must be linked to the programme of implementing a national documentation strategy so that knowledge is permanently captured. It should be funded as part of the programme.
- 4.12 Certain subject areas, for example maritime, mining and textiles history, emerged in the National Audit as being especially distributed by nature. It is suggested certain specialist areas require strategic 'collection-less' curators whose role would be to research, collate and disseminate knowledge of distributed collections rather than manage them physically. Surveys, such as the textiles led by Heriot Watt University supported by the Strategic Change Fund would inform future plans for strategic curators. These posts may well be located outside the Edinburgh/Glasgow axis.
- 4.13 Curatorial under-capacity is exacerbated in the non-nationals because curatorial staff are generally expected to fulfil multiple roles. At the same time, there are too few posts for a full spread of curatorial expertise and lone working prevents skills sharing. A programme of shared curatorial internships (that should involve the nationals) would be an efficient and effective way of improving capacity, of bringing in new blood, and developing curatorial and management skills.
- 4.14 Recommendations
- a. SMC undertakes research on network solutions for improving curatorial capacity in Scotland, perhaps in partnership with Resource.
 - b. SMC, NMS and NGS develop a joint policy and service specification for future delivery of subject specialist advice.
 - c. The Scottish Executive via SMC considers funding delivery of subject specialist advice from nationals.
 - d. SMC or its successor monitors future delivery of subject specialist advice against service specifications.
 - e. The Scottish Executive via SMC funds subject-specialist strategic curators in key areas.
 - f. The Scottish Executive via SMC or its successor funds a curatorial internship programme modelled on the Historic Scotland's conservation internships programme.

Loans

- 4.15 Currently, too few museums have dedicated loans officers (NMS has only 2 handling all Scottish, UK-national and international loans). Non-national museums can be excluded from borrowing material because they are unable to invest in the building improvements to meet the environmental and security requirements of the Government Indemnity Scheme. Long lead-in times for borrowing remove the

ability to be flexible and responsive to community issues. The hidden costs of borrowing (insurance, van hire, venue conversion, environmental control, additional security) exclude many more museums from being borrowers.

- 4.16 The consultation showed there is particular enthusiasm for enhanced opportunities for loans of objects into and out of the nationals and recognition that the nationals are far more willing to engage in loans with the non-nationals than in the past. The wish is for equality of opportunity; partnership not patronage; and for there to be a lasting legacy of collaboration with the non-national sector.

4.17 Recommendations

- a. SMC, NMS and NGS develop a joint policy and service specifications for provision of national loans services.
- b. The Scottish Executive considers funding additional dedicated Scottish Loans Officers in both the national institutions 2006 onwards to implement the above policy.

Conservation services

- 4.18 Conservation backlogs prevent material being available for public enjoyment so non-national museums need access to remedial conservation services. The consultation identified support for national delivery of conservation services. Currently SMC, along with private sector conservators, are the main providers. SMC believes that the most appropriate future base for nationally delivered remedial conservation services is national museum institutions. There is potential for maximising benefits following the planned move of NMS's Conservation and Analytical Research Department to a new Collections Centre at Granton, particularly since this opens up opportunities for possible partnerships with other national agencies involved in the conservation of portable heritage (e.g. Historic Scotland, NGS, NTS).

- 4.19 SMC provides network support for the small band of conservators in non-national museums and provides guidance and training for the much larger contingent of others who also undertake preventive conservation and collections care work. Skills development is hampered by the lack of preservation management qualifications for the former and SVQ uptake for the latter.

4.20 Recommendations

- a. As part of the costed investment programme and a first step in a migration strategy towards a new agency, SMC negotiates a transfer of the conservation service to NMS by April 2004.
- b. In the areas of collection care and preventive conservation, SMC continues to support non-national conservators and increases input into SVQ development.

Security advice

- 4.21 Unpublished findings of the National Audit show that advice on museums security needs to be more widely available for the non-national museums. Currently, a limited amount of advice is provided by Resource mediated by SMC (although the future of the arrangement with Resource is uncertain (see 7.31-7.34), and by local police. SMC currently supports the Scottish Association for Museum Security (SAMS) to provide guidance. As with conservation, we believe the best advice comes from practitioners with direct current experience tailored to users needs. We suggest that the best future source of such advice would be joint provision by the national museums and galleries, funded by Scottish Executive via SAMS and mediated by SMC (or its successor) organisation.
- 4.22 Recommendation
- a. The Scottish Executive considers funding national museums and galleries to provide security advice to non-national museums via SMC or its successor, mediated by SAMS.

Museum Buildings

- 4.23 Many of Scotland's distributed collections are inextricably linked to a particular building or complex of buildings. This explains in part why a high percentage (63%) of museums in the National Audit are in listed buildings. Museums in listed buildings include those built for purpose last century, but there are also many with more recent associations because housing museums in historic buildings has suited and continues to suit economic regeneration and building preservation agendas.
- 4.24 Many buildings originally built as museums are less than fit for purpose for the delivery of 21st century museum services, lacking adequate space for storage and operations as well as the ability to provide facilities of a quality now expected by the visiting public and schools. For all museums in listed buildings, the restriction on adaptation coupled with the extremely high costs of making even small changes results in operating inefficiencies, draining precious human and financial resources. Additionally, the higher maintenance needs and higher cost of operating and maintaining listed buildings mean museums in such buildings bear a significant burden of heritage stewardship additional to that of collections. Compliance with the new disability legislation has added an element of crisis to an already difficult situation and the only way some museums will be able to comply will be by part closure of sites. There is little guidance or training on any of the above from built heritage organisations.
- 4.25 Purpose built accessible stores, such as the NMS and NGS facilities at Granton and the new Shetland Museums store show the benefits to stewardship, public access and operational efficiency of investing in fit-for-purpose dedicated facilities. However developing such facilities requires clear specification and museums lack the necessary standards framework that defines what a museum building should deliver.

4.26 Recommendations

- a. SMC, with partners, commissions design quality indicators for museum buildings, working with the Royal Incorporation of Architects Scotland.
- b. SMC works with Historic Scotland and/or other built heritage agencies to develop guidance on adapting historic buildings for fitness for purpose as museums.
- c. SMC works with partners to research the collections preservation role of museum buildings, including development of realistic environmental parameters for collections.

Museum development

4.27 Although there has been a slow-down in local authority museum development since the 1990s, the independent sector continues to grow. The strongest pressures for new museums come on the one hand from communities seeking a focus for local identity and on the other from planners and developers viewing museums as useful agents for economic regeneration or preservation of built heritage. SMC handled 6 membership applications in the past year from community groups planning or in the early stages of creating new museums. Additionally SMC is aware of as many other plans for new museums or visitor attractions where the discussions are taking place with LECs, HLF and planning authorities without consideration of the strategic impact regionally on the existing museum sector. Financial sustainability is rarely an initial consideration for a new museum. Requests from local and national government to step in to support museums usually come after a museum is established, has acquired collections and permanently safeguarded those collections by becoming a Registered Museum. The result of non-strategic growth is non-strategic rationalisation, which is detrimental to collections, communities and local economies.

4.28 SMC has long recognised that a more strategic approach is needed to museum development and rationalisation. A key activity for the Regional Development Officer posts would be to influence decision-making that ensures an appropriate balance between sustainable museums and contribution to wider agendas, taking regional diversity into account (see 3.12-3.17 and 5.4-5.7).

4.29 Recommendation

- a. Regional Development Officers with SMC develop a strategy for new museum development.

Rationalisation of collections and collecting

4.30 Rationalisation is, understandably, a very sensitive issue and people have been reluctant to discuss it in the consultations. While many organisations want to rationalise or redistribute some parts of collection, their ability to do so is obstructed by mechanisms of disposal combined with community pressures to retain formal ownership. Critically, as long as funding for collections is linked to ownership there will be disincentives to rationalise. However, the need to

rationalise is being voiced on the basis that there are insufficient resources to support unrestrained growth. There is also growing support for the need to target resources towards the most important collections and recognition that mechanisms are needed, although there is as yet no agreement on the appropriate mechanism.

- 4.31 The initial requirement of a fair and transparent process of rationalisation that might win the support of the sector would be the development of an agreed collecting policy for the distributed national collection. Implementation could only be achievable once there is adequate documentation of all collections (see 4.5-4.8.) SMC's view is that the process of developing a collecting policy for the distributed national collection would be most acceptable if it begins at the regional level in order to take into account local as well as national significance of collection significance. It would be a task initially for SMC or its successor organisation working in collaboration with Regional Development Officers, museum staff on the ground, national experts and UK wide agencies.
- 4.32 Until there is UK-wide review of acquisition and disposal policy and re-appraisal of the link between collecting and funding then de-accessioning will be very difficult for museums. Resource would be the most appropriate body to lead future research in this area as mechanism should build on cross-domain experience.
- 4.33 Recommendations
 - a. SMC leads on the development of regional then national collecting policies for the distributed national collection.
 - b. SMC or its successor participates in future UK projects that research new approaches to acquisition and disposal in museums.

5 Bridging the gap

Context

- 5.1 Building sector capacity, developing ICT and raising standards are essential for museums to improve the quality, efficiency and effectiveness of both core delivery and wider contribution. These three themes have been grouped together in this response because they are critical to bridging the gap between the current situation and how the sector can and should be performing. Strategic development is needed in all three areas.

Building greater capacity within the sector

- 5.2 The National Audit outlined the staffing profile of the museum sector, and showed clear lack of capacity in the areas of curatorial, conservation and education work. It highlighted that 53% of the museum workforce are volunteers, which presents particular challenges in management, and the design and delivery of training and skills development.
- 5.3 While more staff on the ground would undoubtedly make a difference, national solutions and regional networks would spread resources more effectively. Mechanisms for addressing specific areas of professional under-capacity are dealt with under the relevant sections of this document.
- 5.4 Regional under-capacity would be addressed by creating a regional development infrastructure as described and recommended in section 3. Significant further consultation might be for eight new centrally funded posts based in four regions: the existing Highlands and Islands Enterprise (HIE) region; the industrial central belt and two other regions to the north and south of the central belt.
- 5.5 Flexibility of approach should be built in to allow each region to identify structures and solutions that best suits its needs. The posts might be located in Local Enterprise companies or Local Authorities. Regions might select to distribute or centralise the posts, or to require each post to specialise in its remit.
- 5.6 The Regional Development Officers would have remits for strategic museum development; liaison with funding and development agencies; brokering and fostering social, economic and operational partnerships between museums and/or other organisations; co-ordinating Museums Forums; fostering networks of local authority and independent museum workers generally and channelling national policy and strategy.
- 5.7 Recommendation
- a. The Scottish Executive funds SMC to create 8 new Regional Development Officers and new Regional Development Co-ordinator in SMC.

Training and Skills Development

- 5.8 The National Audit showed that around 50% of museums did not have either a training policy or a budget for training. The SMC Board recently reviewed training needs and provision for the museum sector in Scotland, drawing on extensive research which has been conducted by the Cultural Heritage National Training Organisation⁹, Metier¹⁰, HLF UK Museums Needs Assessment¹¹, Resource¹², the Clore Duffield Foundation¹³ and St Andrews University¹⁴. The recommendations below are based on this analysis, and on SMC's experience as one of the key training providers to the museums sector in Scotland.
- 5.9 Identified training needs for the museum sector in Scotland can be broken down into the following areas:
- Managerial skills - leadership, strategic thinking, project management, partnerships, grants and funding applications.
 - Promotion of human resource strategies - continuous professional development, academic and vocational qualifications, modern apprenticeships, workforce profile and balance.
 - Training needs of volunteers.
 - Specialist skills - education services, preventative conservation, disaster planning, access, marketing, exhibition planning, ICT, publicity/PR.
- 5.10 Current training provision is through short courses from a number of providers, notably SMC, the Scottish Council for Voluntary Organisations, Arts and Business, and the Scottish Centre for Cultural Management and Policy. Museums have been slow to take advantage of training through the Local Enterprise Companies, and in turn Local Enterprise Companies are inconsistent in terms of provision. In addition formal qualifications are available in the form of the post-graduate Museums Diploma at St Andrews University, and SVQs in cultural heritage management. Uptake of training opportunities has been low on all but the SMC courses. This is probably a reflection of the low priority given to training and skills development by museums, and demonstrates the need for training to become more firmly embedded in organisational culture. It also points to the need for a

⁹ *Workforce Development Plan, Priorities for Action*, CHNTO, 2001

¹⁰ Metier, National Training Organisation for the Arts and Entertainment Sector, *Workforce Development Plan*, 2001

¹¹ *UK Museums Needs Assessment*, Heritage Lottery Fund, 2002

¹² *Renaissance in the Regions*, Resource, 2001

¹³ www.cloreduffield.org.uk

¹⁴ *Training Needs Survey*, St Andrews University, Department of Museum Studies, 2000

strategic approach to training and skills development, which might be achieved through an effective Sector Skills Council in partnership with SMC.

5.11 The potential development of a new Sector Skills Council, representing the needs of the cultural heritage sector and replacing the Cultural Heritage National Training Organisation (CHNTO) remains at an early stage. The Department for Education and Skills has indicated that it wishes to see existing national training organisations coming together to form a smaller number of new agencies, led by the needs of employers. CHNTO intends to submit a formal expression of interest to establish a new Sector Skills Council for the Cultural and Creative Industries by the end of March 2003. SMC and others need to facilitate involvement by Scottish agencies in the establishment of an effective Sector Skills Council representing the interests of museums, or run the risk of a continuing policy vacuum on training and skills development at national level. There is a need to:

- Identify appropriate agencies for involvement, and facilitate wider consultation in Scotland.
- Quantify the contribution that SMC already makes towards training and skills development for museums, in part as the basis for employer contribution to any new agency.
- Develop appropriate Scottish solutions on infrastructure of the Sector Skills Council in Scotland, and ensure that these are embedded in the new Action Plan for Museums.

5.12 Recommendations

- a. The Scottish Executive, SMC and other relevant organisations secure an effective Sector Skills Council for museums.
- b. SMC reviews its own training programme content and delivery, increasing bursaries and introducing new areas to meet training needs.
- c. SMC develops partnerships with Volunteer Development Scotland, Scottish Council for Voluntary Organisations and Heritage Lottery Fund to meet the training needs of volunteers and the independent museum sector.
- d. SMC works with the Scottish Qualifications Authority, the new Sector Skills Council, museums and training providers to promote cultural heritage SVQs, within the overall Scottish Credit and Qualifications Framework.
- e. SMC works with museums, the Scottish Leadership Foundation and the Museums Association to develop leadership in the museum sector.
- f. SMC works with other interested agencies to develop alternative options for learning delivery in museums, for example online learning.
- g. SMC explores the options for development of the SMC/Arts and Business pilot Board Development programme, which offers comprehensive training in governance matters to museum trustees.

Developing ICT

5.13 The potential application of ICT in the museum sector is extraordinary. Not only is ICT an essential component of museums internal knowledge management but it enables museums and galleries, whatever their size, to contribute to cultural, social and economic provision at local and national level. Use of ICT can enable museums to:

- provide on line access to collections
- provide curriculum based educational content
- provide material for remote supported learning for all ages
- provide material for broader cultural, social and philosophical speculation
- provide a mechanism to promote active citizenship and participative democracy
- market their services to existing and new audiences
- network with other providers to share knowledge and best practice for the mutual benefit of the museums sector.

5.14 The National Audit demonstrates the challenges facing the sector in terms of addressing ICT at every level. Museums need to address the whole spectrum of knowledge management which takes the museum from information gathering to the dissemination of knowledge across a variety of technical platforms. The National Audit demonstrates the relatively low threshold of ICT investment and literacy in the sector and concludes that the level of resources required for the delivery of virtual access is at least equal to that required for access to the physical collections. Resources in this sense includes not only financial resources but management commitment, time and thought in developing appropriate integrated strategies and ensuring these are implemented.

5.15 SMC has taken the lead in setting up a Task Force of representatives of the relevant UK and Scottish organisations, including the Scottish Executive, and has developed an ICT Strategy for Scotland's Museums (2000, revised 2001). The strategy addresses issues of infrastructure, content creation and training and skills development. The strategy is entirely consistent with the Scottish Executive's objectives of interoperability and electronic delivery of public services, though there has not yet been any real consideration of what those targets might mean in practical terms for museum services. The desired outcomes of the revisited strategy should include: create infrastructure; develop knowledge management; provide training and skills development; create content; provide on-line access; meet government targets for on-line services (including develop local authority targets to comply with e-gif;) and develop policy for, and ensure maintenance of, a national e-archive.

5.16 Recommendations:

- a. SMC Task Force reviews the ICT Strategy for Scotland's Museums by 2003.
- b. The Scottish Executive formally endorses the (revised) ICT Strategy, which should form basis of action for 2003-6.
- c. The Scottish Executive secures the public role of SCRAN
- d. The Scottish Executive explores the provision of broad band capacity for museums in the same way as the Public Library Network provides this for libraries.

Standards and Performance Indicators

- 5.17 Standards ensure consistency of quality and ideally museums need UK wide standard used consistently. The main standards-raising tool for UK museums is the Resource Registration Scheme. All advice and assessment work for the non-nationals is undertaken by SMC, in keeping with our mission to improve the quality of museum and gallery provision in Scotland for the public benefit.
- 5.18 In Scotland, inclusion in the Registration Scheme is used by Audit Scotland to measure the performance of local authority museums and the independent museums they support. There is considerable pressure on Scottish Local Authorities to ensure their own and independent museums are registered. For the few directly delivered local authority museums that have to charge admission, the 1887 Act is an obstacle to Registration. Also, there is no obligation for local authorities to act as curatorial advisers to support independents.
- 5.19 SMC considers that for museums to demonstrate their competence to manage cultural assets and their contribution socially and economically, they need performance measurement that meets modern standards of transparency, accountability and equal opportunity. These are requirements of public service accountability as well as increasingly necessary to attract and account for funding from a growing range of sources. Museums need performance measures that are as robust and open as for other public services. They need to be able to celebrate excellence as well as recognise deficiencies in order that these can be addressed. They need standards that accept the diversity of the sector in the contributions museums make to communities, learning, tourism and other agendas.
- 5.20 While Registration provides a toolkit of standards to assist museums to improve in-house, it is less effective as a means of measuring performance and demonstrating improvement. The signs are that the new phase of Registration currently under development will not be significantly different from that existing, although it is expected to have a raised threshold, broader accountability (based on the new Museums Association definition of museums) and will include continuous self-improvement (based on forward plans). An emerging criticism of Registration is that it will continue to be a poor fit for museums such as some university collections and local heritage groups unless it takes a modular approach. There is a growing view that to account for Local Authority performance

a few well-researched performance indicators would suffice, and that duplication of effort must be avoided.

- 5.21 By contrast, responses to the standards framework in the National Audit show that a scheme which includes performance levels and specific criteria is accepted and useful to the museums community. These standards could be developed to improve criteria, broaden coverage and improve fit for the full range of museums. If funding is available to update the Audit on a regular basis it would be possible to use the Audit framework as an objective means of performance assessment, evaluating progress against outcomes of the sector as a whole, as well as for individual museums.
- 5.22 Meanwhile reference is made elsewhere to standards which aim to raise quality in specific areas: “Inspiring Learning”, Resource’s Learning & Access Framework (6.16), VisitScotland’s Visitor Attraction Grading Scheme (6.37 & 6.38) and the need for building design quality indicators (4.26).
- 5.23 Reference should also be made to the statutory requirement for local authorities to ensure “adequate cultural facilities”. This is a much broader requirement than the requirement of individual museums to meet organisational standards. SMC is recommending the development of adequacy standards although the most radical step would be to frame new more explicit legislation¹⁵
- 5.24 Recommendations
- a. The Scottish Executive with SMC reviews continued inclusion in the Resource Registration Scheme.
 - b. The Scottish Executive considers commitment of resources for continued development of a measurable scheme based on the National Audit standards framework.
 - c. The Scottish Executive commit resource to updating National Audit on a regular basis.
 - d. Audit Scotland with local authorities and SMC reviews statutory performance indicators for local authorities.
 - e. SMC in consultation with local authorities develops detailed ‘adequacy’ standards in parallel with the review of GAE in 2004-5.
 - f. SMC in consultation with local authorities develops detailed guidelines for Best Value.

¹⁵ Compare the standards framework for libraries and archives in Scottish Executive/Cosla guidelines.

6 Contribution to wider agendas

- 6.1 A key **objective** of the Action Plan for Museums should be to promote and develop museums' contribution to learning and the wider social and economic well-being of communities.

The Learning Power of Museums

- 6.2 Although the structure of this response mirrors the Executive's consultation letter of 6 September, many museums have stated that far from being a 'contribution to a wider agenda', learning in its widest sense is fundamental to their core mission. The National Cultural Strategy recognised this role:

"Our museums, galleries, and built and natural heritage are excellent educational resources. To maximise their potential we propose to support the further development of educational programmes and steps to present collections for young people".¹⁶

- 6.3 In schools, key guidance on the 5-14 curriculum¹⁷ also supports the potential role of museums in meeting the National Priorities for Education. In addition, the crosscutting focus on education for citizenship provides a clear opportunity for museums to show how involvement in museums can contribute to active participation in broader civic life:

'Capability for citizenship encompasses various 'literacies' coupled with the capacity for participation in all aspects of society- economic, social and cultural.'¹⁸

- 6.4 The museum role extends far beyond work with school age children, to formal and informal opportunities for life-wide and life-long learning. From face-to-face interaction with real objects to online access to digital images, and outreach work within local communities, museums and galleries provide stimulating opportunities for learning. Given the variety of organisations, the quality of work undertaken, the exceptional use of volunteer workers, and the breadth and richness of collections, the sector is also uniquely placed to appeal to Scotland's diverse population. Learning and access are central to the success of museums and galleries.

To summarise, museums:

- are powerful learning institutions

¹⁶ *Creating Our Future... Minding Our Past...: Scotland's National Cultural Strategy*, Scottish Executive: Edinburgh, 2000: 29.

¹⁷ *The Structure and Balance of the Curriculum, 5-14 National Guidelines*, Scottish Executive and Learning Teaching Scotland, Edinburgh 2000

¹⁸ *Education for Citizenship: A Paper for Discussion and Development*, Learning and Teaching Scotland, 2002

- contain valuable learning resources (collections)
- use innovative teaching methods
- provide staff with specialist expertise
- provide alternative pathways to learning delivery (through face-to-face and online interaction)
- are a flexible learning resource

6.5 The Action Plan for Museums should present a vision for museum learning which:

- Encourages the mainstreaming of learning and access priorities, ensuring that learning is at the heart of museum operations
- Provides a 'good' baseline level of museum learning provision in every region of Scotland
- Makes a national commitment to developing a minimum cultural entitlement in relation to young people's access to the national cultural heritage, as was suggested by the Scottish Council for the Curriculum in 1999¹⁹. This should establish principles such as visiting and touring rights.

6.6 Despite museums' aspirations and potential for learning there is widespread acknowledgement of the findings of the National Audit²⁰, which demonstrate that museums are not in a position at present to fulfil this role effectively. The National Audit is consistent with a number of UK studies,²¹ which set out the current challenges museums face and the needs, which must be addressed if they are to realise the vision. These studies provide a platform for evidence based policy and indicate potential priorities at national and local level, which have been endorsed in the current consultation. This submission also draws on SMC's responses to the National Debate on Education²² and the Community Education Training Review²³, both of which provide a level of detail, which it is not possible to reproduce here but which should be taken into account when developing the Action Plan.

¹⁹ *The School Curriculum and the Culture of Scotland*, Scottish Consultative Council on the Curriculum, 1999

²⁰ *The National Audit, Chapter 7, Learning*, Scottish Museums Council 2002

²¹ *Renaissance in the Regions*, Resource and DCMS, 2001

UK Museums Needs Assessment, Heritage Lottery Fund, 2002

²² *SMC response to the National Debate on Education*,
www.scottishmuseums.org.uk/pdfs/Education_submission.PDF

²³ *SMC response to Community Education Review*
www.scottishmuseums.org.uk/pdfs/Community_Education_Training_Review_response.pdf

Education staff

- 6.7 Chief among identified priorities in Scotland is the urgent need to increase the number of specialist education staff working within the non-national museum sector. The National Audit figure of only 117 full-time equivalent posts focused on education, a quarter of which are based in the national organisations, has been quoted as a source of wide concern. While it is not realistic to place education officers within every museum in Scotland, there needs to be a substantial increase in the number of specialist museum education officers working on a collaborative basis for a number of museums. As the National Audit noted:

‘Although museum education is increasingly being disseminated through alternative delivery channels such as computer packages, multi-media aids and digital collections, learning resources generated through human contacts provide the backbone for overall education activities. Experienced staff are pivotal to the creation of these opportunities and the fulfilment of the learning aspirations of the sector as a whole.’

- 6.8 Without the necessary staff, access to Scotland's cultural heritage will not be made equally available to all. In England, the Education Challenge funds have demonstrated that an increase in capacity can establish a firm policy base for learning within museums and lead to demonstrable outcomes for learners. An alternative model is provided by the Scottish Arts Council 'Links' programme, which seeks to establish posts within Local Authority education departments with match funding from the host council, with the aim of developing the relationship between arts organisations and local learning strategy. At present, museums are disadvantaged as learning providers both in relation to their English counterparts, and to other parts of the cultural sector.
- 6.9 It also follows that without education staff museums will be disadvantaged in relation to other important programmes such as the Cultural Co-ordinators Initiative. Museum staff have indicated that museums have a low profile in relation to the Cultural Co-ordinators scheme and few services were involved in forming the bids. The status of museum and gallery education should be addressed if the scheme is to meet its stated objectives.

Increased profile for learning through museums

- 6.10 The low profile and status of learning in museums amongst other learning providers, such as schools and community education departments, should also be addressed in other ways. Following recommendations made in the McCrone²⁴ report, appropriate museums should be encouraged to become training providers for both teacher training at all levels, and continuous professional development. Appropriate museums should also be encouraged to register training and CPD programmes in the Executive's new National Register of Providers. Such training would enrich and invigorate teaching within schools and communities while also

²⁴ *A Teaching Profession for the 21st century, Volume 1: report of the Independent Committee of Inquiry into Professional Conditions of Service*, Edinburgh 2000

making greater use of museum services. A cross-sectoral committee drawing on the skills and expertise of both the broad lifelong learning and museum sectors would do much to raise the profile of museum learning, and provide an anchor for a long-term learning and access strategy for museums.

Sustainable sources of funding for museum learning

- 6.11 The consultation highlighted the lack of sustainability of learning programmes funded through project budgets. Long term funding and dedicated funding streams for learning are needed to delivery sustained programmes of activity. A strong case was made for the ring-fencing of Local Authority museum budgets to protect core funding. There was frustration at a perceived trend to give funding preference to innovation, where consolidation of good practice was needed. Scottish Executive guidelines to Local Authorities on cultural provision²⁵ should be explicit on the definition of adequacy and should include museum learning as part of baseline provision (see section 3).

Support and infrastructure for learning through museums

- 6.12 More could be done, some of it at little cost, within an appropriate strategic framework, which encouraged co-operation and developed the infrastructure for learning through museums. Investment in improving access to practical advice and support on the development and delivery of learning programmes through an intermediary agency would also be a cost effective solution. A clear outcome should be better links between museum exhibitions and the school curriculum through the design of appropriate support materials and outreach services. One route for development might be to build on the good partnership between SMC and the Group for Education in Museums in Scotland by establishing a joint Co-ordinator. Capacity would be increased through training provision, and sharing of resources, knowledge and skills.

Use of ICT

- 6.13 Another important area should be to ensure that museums take full advantage of the educational potential of ICT for learning delivery, for example through the development with Learning Teaching Scotland of a Virtual Learning Environment for museums, further development of SCRAN, and museum involvement in the National Grid for Learning and Communities Scotland 'Connecting Communities' programme. The potential for online learning through museums needs to be addressed through both national ICT and learning and access strategy (see 5.13-5.16).

Access to learning

- 6.14 The prohibitive cost of transport has been cited repeatedly during the consultation as one of the major inhibiting factors to museum visits by school and other community groups. A practical solution to addressing this barrier would make a

Implementation of the National Cultural Strategy: Draft Guidance for Scottish Local Authorities, Scottish Executive, 2002²⁵

significant difference to the numbers of people able to access the cultural heritage, particularly in rural areas. Consideration should be given to the establishment of a small grants scheme, to cover transport costs for group visits from school and community groups with an educational purpose to non-national museums perhaps funded through the Heritage Lottery Fund and/ or private sponsorship. Creative approaches such as the recent partnership between Glasgow City Museums and the local bus company should also be explored.

- 6.15 There is also scope for the development of travelling museum exhibitions, again potentially linked to the schools curriculum, and making best use of the distributed national collection. A Touring Exhibitions Fund, administered by SMC, could support the learning activities of independent museums and assist local authority and national museums to extend their role. Particular emphasis should be given to involving Social Inclusion Partnerships. Edinburgh City Council's Travelling Gallery and Fife Museums and Arts Coach provide potential models on which to build.

Standards for learning

- 6.16 Finally the current inconsistency of learning provision in museums is exacerbated by the absence of clear standards for learning and access by which provision might be measured. In England, Resource is seeking to address this through the development and implementation of the Inspiring Learning²⁶ framework, a comprehensive assessment tool based on learning outcomes for museums, libraries and archives. In Scotland, while there is considerable interest in Inspiring Learning, the lack of clarity on Resource's role and the absence of a cross-domain umbrella body have so far proved a stumbling block to implementation. The Action Plan presents an opportunity to remove such obstacles and paves the way for the development of a learning standard in Scotland, which would enable museums to demonstrate both their contribution to learning and their progress over time.

Recommendations²⁷

- a. The Scottish Executive considers the case for national minimum cultural entitlement for young people.
- b. The Scottish Executive establishes a fund to support staff costs for education officers in non-national museums.
- c. SMC with Learning Teaching Scotland co-ordinates a cross-sectoral museum learning committee including representatives from museums, Communities Scotland and Youthlink Scotland.
- d. A cross-sectoral committee develops and promotes a three year learning and access strategy for museums.

²⁶ www.resource.gov.uk/action/learnacc/00insplearn.asp

²⁷ Recommendations assume appropriate levels of investment from the Scottish Executive- outline costs are set out in the attached Investment programme.

- e. The Scottish Executive closely evaluates the Cultural Co-ordinators Scheme against its stated objectives.
- f. SMC works with the Scottish Arts Council to increase the profile of museums in the Cultural co-ordinators scheme.
- g. The Scottish Executive works with Local Authorities, COSLA and SMC to ensure adequate budgets for and guidelines on learning through museums, perhaps extending to ring-fencing of museum budgets.
- h. SMC works with SHEFC to ensure museums are part of training programmes and continuous professional development for teachers, volunteers and community education workers.
- i. SMC considers the case for a National Transport Scheme.
- j. The Scottish Executive with SMC considers the case for a National Touring Exhibitions Fund.
- k. An ICT Strategy for Scotland's Museums, also sets out an Online Learning Plan.
- l. SMC with the Scottish Executive and other relevant agencies develops and implements a learning and access standard for museums in Scotland.

Social Justice and Equality

6.17 'Everyone has the right freely to participate in the cultural life of the community, to enjoy the arts and to share its scientific advancement and betterment'²⁸

6.18 SMC's important publication *Museums and Social Justice* asserts:

'[Museums] merit public funding on the basis that the opportunity to be inspired by great artistic or scientific achievements or to explore the evidence of a community's and humanity's past is not an optional, but an essential element in our society. It is the right of all citizens of Scotland. The integrity of museums depends on these experiences being available, not just in ways which suit the better-off, the socially confident and the well-educated but which recognise the social and economic realities of the lives of all citizens.'

These principles should remain a cornerstone of any Action Plan for Museums and indeed are implicit within the Executive's current spending plans²⁹ "culture and sport can be powerful tools in helping people marginalised by society for whom other approaches have failed".

²⁸ Article 27 of the Universal Declaration of Human Rights.

²⁹ *Closing the Opportunity Gap*, Scottish Budget for 2003-2006, Scottish Executive, 2002

- 6.19 The National Audit presents findings on current levels of access to and community involvement in Scotland's museums. Despite developments in museums' approaches to social inclusion, learning and access, approximately 25% of the population in Scotland never visits a museum or gallery, and a number of studies have indicated that people in the C2DE social groupings are least likely to attend.
- 6.20 However, Scotland lacks comprehensive information on barriers to involvement in museums, for example at the level of socio-economic profile of visitors or attitudes to attendance/ non-attendance. It is possible within the constraints of existing understanding of audiences to identify a number of key issues which an Action Plan for Museums should address to ensure access for all to Scotland's museums:
- A large proportion of Scottish museums (63%) are in listed buildings, and museums are likely to require significant guidance and capital investment if they are to meet the requirements of the Disability Discrimination Act. This guidance extends beyond the technical, to the dissemination of enlightened good practice on how to create welcoming environments for people of all ages, and socio-cultural backgrounds.
 - Museums also need to make their displays intellectually accessible to a wider audience, and agencies such as SMC and Intact should continue to disseminate the good practice guidelines contained in *Access in Mind*³⁰.
 - The statutory framework for museums³¹ prevents Local Authority and national museums charging for admission to permanent exhibitions, considered by many to be essential to address financial barriers to access. On the other hand, independent museums are dependent upon admission charges for survival, since charging currently accounts for around 19% of their annual income. Large parts of rural Scotland do not have ready access to a Local Authority or national museum and the independent museum presents the only option for engagement with cultural heritage, but this is likely to come with direct and indirect costs attached. Many independent museums lift admission charges for the unemployed or for pensioners, or offer special free days, but there are no central support mechanisms to enable or encourage them to do so. If the principle of a distributed national collection is accepted, then we also need to consider ways in which communities have equal access to important parts of the cultural heritage maintained by independent museums.
 - A number of Scottish museums are active in Social Inclusion Partnership areas, and heritage has been a successful vehicle for exploring issues of identity, developing new skills, building confidence and self-esteem.³²

³⁰ *Access in Mind – Towards the Inclusive Museum*, Intact – The Intellectual Access Trust, 1999

³¹ 1887 Public Libraries Consolidation (Scotland) Act

³² *Museums and Social Justice, Case Study Examples*, Scottish Museums Council, 2000

However, there is considerable scope for promoting and developing the work of museums in SIP areas through the development of effective cross-sectoral partnerships. The current lack of capacity and skills gaps within the museum sector has inhibited the development of such partnerships, as has the absence of a comparable funding stream to the Scottish Arts Council's Social Inclusion Fund.

- The profile of the museums workforce is also not representative of the Scottish population eg in terms of age, socio-economic and ethnic balance. SMC needs to continue to work with the Museums Association and equality organisations such as the Black Environment Network to encourage diversity in the workforce. More widely SMC should work with other relevant bodies to develop a cultural diversity strategy.

6.21 Recommendations

- a. SMC with Resource, HLF and the other National Cultural Agencies conducts further research into audience motivation, barriers to attendance and the wider social impact of museums.
- b. The Scottish Executive invests through SMC in Regional Development Officer posts with a remit to develop external social and economic partnerships at local level between museums and other agencies.
- c. SMC establishes a post of Regional Development Co-ordinator to manage and co-ordinate the Regional Development Officer posts.
- d. A new Heritage for All fund targeted at Social Inclusion Partnerships.
- e. SMC and HLF continue to work jointly to develop the number and quality of Lottery applications in SIP areas, and amongst small museums.
- f. SMC works with the Museums Association and other bodies to encourage cultural diversity in museums.

How to Develop and Maintain Wider Audiences

- 6.22 Understanding audiences and their motivations is the key to establishing museum services in Scotland, which genuinely meet the needs and aspirations of all parts of the community. In the arts sphere the audience development strands of the Scottish Arts Council Lottery funding programmes has partly addressed this issue, but there is no parallel devolution within Heritage Lottery Fund to enable national museums strategy and Lottery funding to work together. More broadly, there is no overall framework for the collection of cultural statistics and research in Scotland, although the current Scottish Executive attempts to address this absence through COSLA and the National Cultural agencies is most welcome.

- 6.23 The National Audit identified that there is considerable scope for improvement in terms of museums marketing, which could both increase visitor numbers and improve visitor spend. This might partly be addressed through training delivery by agencies such as SMC, or through a combination of LEC/ SMC collaboration as in recent marketing training run in Ross and Cromarty. The subsequent consultation has directly ascribed inadequate marketing to shortfalls in core funding. While there are clear ways in which museums could gain through better collaboration with each other, the LECs and local tourist boards, only an increase in core funding is likely to lead to significant gains.
- 6.24 Joint initiatives such as the audience development agencies which have been established in a number of urban centres to generate increased audiences for the performing arts, might be explored for cultural heritage. At the very least, there is evidence that museums would benefit from the development of toolkits in areas such as visitor surveys and press and media promotion.
- 6.25 VisitScotland's Tourism Framework for Action³³ similarly identified the need both to improve market intelligence on visitors and, to develop campaigns which would target particular niche markets, including culture, more effectively. National Audit information on the distributed national collection would lend itself to joint national and regional marketing campaigns highlighting Scotland's cultural treasures and where they are located.
- 6.26 The Scottish Cultural Portal, which will be aimed at the visiting public, presents a further opportunity for co-ordinated marketing of museums, although it will be essential to upgrade the ICT infrastructure in many museums before they can fully participate.
- 6.27 The Strategic Change Fund, set up by the Scottish Executive and administered by the Scottish Museums Council, has already demonstrated a creative approach by museums to developing new audiences. It is essential to retain a funding stream which enables museums to be actively supported to achieve this key objective.
- 6.28 Recommendations
- a. The Scottish Executive with SMC, COSLA, the National Cultural Agencies and VisitScotland establishes a national framework for the collection of cultural statistics
 - b. SMC with COSLA, National Cultural Agencies, VisitScotland and Resource conducts research into audience motivation and composition.
 - c. SMC with new Regional Development Officer posts in Local Authorities develops and implements strategies to build new audiences, including through the provision of training and tool kits.

³³ *Tourism Framework for Action 2002:2005*, Scottish Executive

- d. The Scottish Executive continues to use a funding stream, such as the Strategic Change Fund, to build new audiences through innovative ways of working.

The Important Contribution of Volunteers to the Sector

6.29 *'Our vision is of a society built around communities of place and of interest, in which it is known and accepted that people can and do freely engage in shared action leading to improved quality of life for themselves and others. Our mission is to create a long-term strategic framework that will make it easier for all those who wish to engage in volunteering and community action to do so. This involves promoting and protecting engagement as a basic right of all citizens in a free and democratic society; developing the means of making it effective; and reducing the barriers to involvement, especially barriers of discrimination. Resources must be committed to ensure that it happens.'*³⁴

6.30 The National Audit highlighted the important contribution of volunteers to the museum sector in Scotland. It showed that 53% of the museum workforce are volunteers, the overwhelming majority work within independent museum organisations (84%). Paradoxically, independent museums which receive least from public funding sources, are amongst the best able to demonstrate links with their local communities. However, there are no existing mechanisms for recognising high levels of volunteer and community participation in local independent museums, or rewarding the rich contribution they make through active citizenship to Scottish life. The Action Plan for Museums should adopt the vision set out by the Active Communities working group in Scotland and develop a framework, which recognises the important contribution both of volunteers and the independent museum sector. This should offer a parity of opportunity to volunteer and paid staff in museums.

6.31 SMC has identified the following issues in relation to volunteers:

- The heavy dependence on volunteers for core functions means that museums need to continue to attract high numbers and a broad range of volunteers, particularly young people, to ensure sustainability.
- There is a need to introduce appropriate volunteer management and support structures in museum organisations, which could address volunteer recruitment, retention, training and skills development in the sector.
- There is a need to strengthen the infrastructure and support mechanisms for the independent museum sector in order to build capacity. The role of Local Authorities will be key, but there is also a place for stronger central advocacy and action through SMC, the Association of Independent Museums, Scottish Council for Voluntary Organisations and/or a combination of all these bodies.

³⁴ *Supporting Active Communities in Scotland, A Draft Strategy for Volunteering and Community Action*, Scottish Active Communities Working Group, Scottish Executive 2000.

- Funding bodies, such as Heritage Lottery Fund, have a particular responsibility to ensure that volunteer-run museums are not disadvantaged by funding programmes and procedures.

6.32 Recommendations

- a. SMC, the Sector Skills Council, Volunteer Development Scotland SCVO and others develops appropriate guidance and training for museums on working with volunteers.
- b. SMC and SCVO continues to explore the implementation of The Big Picture quality management tool in independent museums.
- c. Regional Development Officers take a lead in co-ordinating Museums Fora at local level.
- d. HLF, SMC and other funding bodies continue their active approach to development, through the provision of joint funding roadshows and advice surgeries.
- e. SMC considers with the Association of Independent Museums, SCVO and others the potential for an annual conference for museum volunteers.

Economic priorities- Tourism

6.33 Scotland's 435 museums attracted 13 million visits in 2000, the year in which the National Audit was conducted. In 2001 around 7,829,781 visits were reported by the Moffat Centre for Travel and Tourism³⁵ at Caledonian University. VisitScotland calculates that the average visitor from outside Scotland spends about £200, which represents £2 billion in direct annual expenditure. More than half of visitors from outside Scotland visit museums and heritage sites, and many of them are positive about the experience. Scotland's cultural heritage provides a key motivation to visit Scotland and therefore the wider economic impact in terms of spending on accommodation, food and travel is also partly dependent upon museums' contribution to the Scottish tourism product.

6.34 The *Tourism Framework for Action* published by the Scottish Executive and VisitScotland recognises the importance of cultural heritage to the marketing of Scotland as a tourist destination. It identifies the significant potential for museums to develop high quality visitor experiences, building both on the knowledge and strengths of the distributed national collection and their role as learning providers. Museums are a significant component of VisitScotland's strategies to target niche markets for cultural tourism, and genealogy.

'The Scottish Tourism Attitude Surveys of 1999 and 2001 confirmed that Scotland enjoys a high level of international recognition as a country with a fascinating and distinctive history and culture. Our people are described by many as welcoming. Scotland's visitors are changing. They are likely to be affluent, active, well-travelled and comfortable with using technology. They are more discerning and demanding, and increasingly seeking memorable and high quality, value for money experiences. There is a growing interest in those destinations that offer a rich and varied culture and environment, as well as opportunities for learning, self improvement or pursuing personal interests and hobbies³⁶.'

6.35 The current consultation has confirmed that tourism is of vital importance to the social, economic and cultural well-being of Scotland, from major cities to rural areas, many of which depend on museums for jobs and infrastructure. In rural areas, in particular, museums report that they also operate as unofficial tourist information centres, interpreting not just a place's history and identity but keeping files on accommodation, bus and train timetables, and advertising and providing a venue for special events. Museums are well-placed to contribute to the recently announced 'National Events Strategy', for example through adding real value to anniversary celebrations of people and places, or important aspects of Scottish culture, be they the maritime past, clan history or football.

6.36 The creation of an Action Plan for Museums creates a vital opportunity to link the Tourism Framework for Action and museum strategy at national level through SMC and VisitScotland. The combination of tourism and culture into one ministerial

³⁵ *Visitor Attraction Monitor*, Moffat Centre for Travel and Tourism, Caledonian University

³⁶ *Tourism Framework for Action 2002-2005*, Scottish Executive,

portfolio should also allow the Scottish Executive to ensure that action is taken to both improve the quality of the 'product' and market museums more effectively as part of wider tourism plans. SMC has already taken steps to ensure VisitScotland is represented on its Board of Directors. A Regional Development Co-ordinator based at SMC would take the lead on national museums policy in relation to tourism, and would also link to Regional Development Officers able to make partnerships at local level. This would enable co-ordinated activity across Local Authority boundaries and ensure heritage and other attractions within a locality work together to promote a destination.

6.37 Despite the significant potential for museums to contribute to tourism, the National Audit showed³⁷, and the current consultation has confirmed, that provision for tourists is inconsistent across Scotland. Around 40% of museums do not provide cafes or retail facilities, perhaps due to the limitations of the building, which they are housed. Around 50% of museums are members of the Visitor Attraction Grading Scheme, VisitScotland's recognised standard for visitor care. The visitor's experience will further depend on the museum's ability to interpret the past in interesting ways, perhaps through the use of ICT, hands-on activities for children and families, storytelling and live interpretation. Improvements could also be made to museums' marketing, publicity and income generation efforts, particularly through more effective use of ICT. The Scottish Cultural Portal may be one route for development, and it might also provide a platform for the testing of e-business for the cultural sector. How effectively a museum can do this will in part depend on levels of investment in staff and equipment, and therefore should be addressed under the need for core funding (see section 3). Joint training initiatives, linked to accredited qualifications, and standards development by the relevant national agencies would also be beneficial.

6.38 Recommendations

- a. VisitScotland and SMC work together to co-ordinate national strategies for tourism and museums, improving marketing and addressing wider issues which impact on museums.
- b. VisitScotland, SMC, and other relevant bodies research visitor motivations and satisfaction as a basis for strategy and promotion.
- c. SMC, and others research direct and indirect economic impact of museums.
- d. VisitScotland/ MC promotes membership of the Visitor Attraction Grading Scheme as a mechanism for improving standards of visitor care and services, addressing current barriers to museums' participation.
- e. Regional Development Officer posts assist museums to play a full part in local tourism initiatives, encouraging joint marketing and interpretive strategies where appropriate.

³⁷ *National Audit, Section 4, Visitor Numbers and Economic Performance*, Scottish Museums Council, 2002

- f. SMC works with LECs, Association of Scottish Visitor Attractions, VisitScotland and other training providers to address skills development in tourism related areas, for example through advice and guidance on business planning and development through the small business gateways.
- g. The ICT Strategy for Scotland's Museums addresses the ICT needs of museums to enable them to meet rising visitor expectations.

Museums' role in regeneration

6.39 Historically, many museums have been established for economic reasons. Local Authority planning departments, the Urban Programme and the Enterprise networks have correctly identified museums' contribution to their agendas and have provided start –up funding. Museums can provide a focus for local pride and enterprise, a new image for a place and a reason for outsiders to visit a previously depressed area. In turn, the early years of the Heritage Lottery Fund were distinguished by major capital investment in new facilities driven by a similar motivation. Scotland's independent museums, in particular, owe their genesis to this approach: the Scottish Maritime Museum in Irvine, Dundee Industrial Heritage, Kilmartin House in Argyll.

6.40 In the previous two decades the number of visitor attractions in Scotland has increased significantly from 401 attractions in 1980 attracting 30 million visitors to 1,013 attractions in 2000, attracting 36 million visitors³⁸. This growth raises critical questions:

- What is museums' full economic impact? – do museums merit wider public investment than exists at present?
- Is such growth sustainable in the long term, both in terms of visitor projections and the ability to meet core funding requirements?

6.41 On the first point, authoritative research is needed on the economic impact of museums, perhaps as a second phase of the National Audit, to prove the legitimacy of their call on enterprise and tourism budgets. Research undertaken by Solon consultants³⁹ in 1999, produced an interesting 'What if' analysis which suggested that it would only take a 1% increase in tourists and their expenditure to justify an investment in museums from tourism budgets of around £14 million. This model is worthy of development. As noted elsewhere in this report (Social Justice section), research also needs to take place into the social impact of museums particularly in Social Inclusion Partnerships and areas of urban and rural deprivation. *Museums and Social Justice*⁴⁰ provides important qualitative information on museums' social impact, and other studies such as the funded

³⁸ STB- Moffat Centre for Visitor Attraction Monitor

³⁹ *Museums in Scotland, an International Comparative Study*, Solon Consultants, Scottish Museums Council, 1999

⁴⁰ *Museums and Social Justice*, Scottish Museums Council, 2000

evaluation of the Open Museum in Glasgow may go further, but to date this has been ad-hoc and uncoordinated.

- 6.42 Secondly, the growth in the number of attractions shows that the Action Plan for Museums needs to fully engage Local Authority planning and economic development departments, the Enterprise networks and Heritage Lottery Fund to be effective in the long-term. Inevitably, new museums are soon in the position of competing for core funding from existing stretched national and local budgets. SMC welcomes recent developments at the Heritage Lottery Fund, which seek to train staff in assessing the potential risks as well as the benefits of new museum development in the current economic climate.
- 6.43 SMC and the Enterprise networks need to work together more effectively to explore sustainable solutions for the delivery of cultural heritage. The recent joint booklet, produced by SMC and Highlands and Islands Enterprise⁴¹, and targeted at community groups wishing to set up a new museum, was a good example of such collaboration. The proposed new Regional Development Officers operating at local level, but linked in to SMC at national level, would be ideally placed to channel such advice. In addition, a number of participants in the current consultation identified the important role of Heritage Lottery Fund. It was suggested that HLF need to consider the need to 're-capitalise' the product, including through significant investment in ICT, to maintain visitor interest over time. These views are consistent with the findings of HLF's own research⁴² into museum needs earlier this year.
- 6.44 Finally, the Action Plan for Museums should not overlook the museum sector's role as a significant employer. As the National Audit demonstrated there are 2,899 people employed full-time within museums, 744 part-time. In addition, 5,736 people work voluntarily. For them involvement in museums can provide an opportunity to gain new skills and confidence, useful in other areas of life and work. However, as section 5 of this response notes, this highlights the need for museums to adopt appropriate human resource strategies, which in turn is likely to require strategic input from SMC and the new Sector Skills Council for cultural heritage (see 5.8-5.12).
- 6.45 Recommendations
- a. Local Authority planning and economic development departments, LECs and HLF involve SMC and local cultural services at an early stage when considering potential new museum developments, to ensure sustainability. (see 4.27-4.29).

⁴¹ *Big Questions, Big Answers*, Scottish Museums Council, Highlands and Islands Enterprise, 2002

⁴² *UK Museum Needs Assessment*, Heritage Lottery Fund, June 2002

- b. Museums, historical societies, LECS and others consider alternative and sustainable options for interpretation of cultural heritage, which may not be capital and cost-intensive.
- c. HLF considers the need for re-investment in capital projects to retain visitor interest.
- d. SMC works with the new Sector Skills Council, VisitScotland, and others to develop museums as good employers, encouraging wider uptake and participation in accredited training and standards schemes, such as vocational qualifications, modern apprenticeships and Investors in People.

7 Roles and structures

- 7.1 A key **objective** of the Action Plan should be to develop effective strategic and advisory structures which are appropriate to modern Scotland.
- 7.2 Our view is that there is a need for evolution in the current strategic and advisory structures where policy, expenditure and accountability is increasingly fragmented. What is required is a modern approach to roles and structures which:
- provides objective and credible strategic advice to the Scottish Executive, local authorities and others
 - secures effective museum policy development, development and administration of museum funding schemes, standards development and strategic performance management of funding schemes and/or individual museums
 - secures effective advisory services for the sector, which may be delivered by a range of providers
 - incorporates principles of modern governance, including proactive accountability and transparency
 - ensures effective stakeholder input and communication
 - provides structures of an appropriate scale and cost
 - ensures there is no duplication of activity, particularly as regards expenditure of public funds.

The Scottish Executive

- 7.3 Because of historic policies, there is a fundamental inconsistency in the Scottish Executive approach to museums compared to other areas of the cultural portfolio. In all other areas, there is a recognised arms length intermediary with a national remit whether for arts, film, sport or libraries. The policy towards museums is currently in transition and Civil Servants are dealing on an ad hoc and 'case work' basis with individual museums and initiatives without the resources or departmental structure to draw these together. The department is severely under capacity with only 6 Civil Servants to cover the spectrum of arts, sport, libraries, lottery, creative industries, national cultural strategy and museums and to provide interdepartmental advocacy, museum policy development, development and administration of museum funding schemes, standards development and strategic performance management of funding schemes and / or individual museums
- 7.4 Our view is that the time has come for the Executive's role to evolve. In recognition of the importance of museums to the cultural portfolio, there should be a consistency of approach which enables the department to take the necessary strategic overview of the museums sector within that wider portfolio. The role of the Executive and the department in particular should be to:

- establish a clear infrastructure framework. The need for a new national framework has been identified as the overriding priority for the Scottish Executive.
- develop an overview of the sectors contribution to wider cultural, social and economic agendas, including education and cultural tourism.
- lead on interdepartmental advocacy. The contribution which museums can make to education, lifelong learning and skills development is not yet recognised in Executive-wide policy or funding arrangements.
- initiate legislative changes and policy reviews eg review of GAE, and of the 1887 Act⁴³
- make strategic policy and funding decisions

7.5 From this. other propositions logically follow:

- the department should not have a hands on development function, which should instead be delivered by an intermediary, currently SMC
- design and delivery of investment funding should be via an intermediary, currently SMC.
- there are difficult decisions to be made about whether the Scottish Executive should continue current direct funding arrangements. At present the department funds 6 organisations: the National Museums of Scotland and the National Galleries of Scotland, Glasgow Council and the 3 industrial museums. We do not doubt that the Scottish Executive will wish to continue to fund NMS and NGS directly and possibly to continue to recognise the special position of Glasgow. With respect to the other 3, there is a general recognition that emergency funding for museums in crisis is a legitimate and in many ways a welcome move. However there is a great unease about the decision making process in the provision of direct funding for non national museums. If direct revenue funding is to continue then there should be radical changes to the process which should observe principles of transparency and due process.

7.6 Recommendations

- a. The Scottish Executive clearly articulates the role of the Department and its relationship with SMC and any successor.
- b. The Scottish Executive considers what policy and funding models it wishes to adopt.
- c. The Scottish Executive adopts a transparent policy for any direct funding.

⁴³ 1887 Public Libraries Consolidation (Scotland) Act

Local Authorities

- 7.7 The Scottish Executive/COSLA guidelines spell out the importance of local authorities for cultural provision throughout Scotland. Local authorities are major players in terms of their financial resources, their role as community leaders and their ability to cross organisational boundaries.
- 7.8 Most local authorities maintain direct museum services and will wish to continue to do so. There is an urgent need to address the issue of capital investment, particularly to meet DDA requirements, as disclosed in the National Audit and HLF research. Most local authorities have little flexibility in capital budgets and this combined with the legacy of under-investment represents a looming crisis for local authority infrastructure. ICT also presents a challenge for local authority museum services, particularly as many rely on 'corporate services' where museum infrastructure and resources are not well understood and are not a high priority. This is an area where regional partnerships may be particularly appropriate.
- 7.9 Local authorities museum services must also be seen in the overall local authority context of:
- a statutory obligation to ensure 'adequate cultural facilities'
 - an obligation to demonstrate Best Value
 - a developing culture of effective performance management which focuses on outcomes.

All of these requirements are likely to focus increasingly on outcomes which cross traditional reporting boundaries. SMC's initial work on adequacy and Best Value has been put on hold, pending the publication of the Scottish Executive/COSLA guidelines. This work should now be resumed, emphasising the importance of quality of provision and accommodating the complexity of regional partnerships and interdepartmental activity. Attention should also be given to the development of more appropriate statutory performance indicators (see 5.24).

- 7.10 In virtually all local authority areas independent museums are an important part of overall provision, and some local authorities are wholly reliant on independent museums eg Stirling, Midlothian. In this as in other respects, Highlands provides a model of good practice, in which Highland Council has a formal agreement with independent museums providing funding against clear criteria and a clear commitment by independent museums to provide public services to specified standards.

The consultation process also revealed more clearly than before the extent to which the local authorities support independent museums, not only through grant aid but through provision of in kind support. Many local authority personnel act as curatorial advisers to independent museums, but as already identified this is a role which is being stretched to its limits with advisers in many cases acting as de facto regional development officers with an inadequate infrastructure of central or local support (see 4.3 and 5.18).

- 7.11 As indicated earlier, introduction of the “hubs” model on an English scale seems inappropriate. It would allow for only one hub for the whole of Scotland. Even a modified form may cause difficulties across local authority boundaries and may not fit Scotland’s rural geography. Our view is that a more appropriate approach is to focus on regional development, rather than a hierarchical framework. This is a more flexible approach which can adapt to local circumstances, particularly important if community planning is to be a key driver of local cultural provision.
- 7.12 However to achieve any significant advance in provision within local authorities, we strongly endorse the principle that regional development must be able to cross local authority boundaries. That requires a change in culture within many local authorities. It also requires a considerable commitment of resources. The evidence of the Strategic Change Fund demonstrates all too clearly that the lack of capacity within local authorities is an extraordinary restriction on their ability to develop and maintain cross authority initiatives, even where there is a desire to do so.
- 7.13 Recommendations
- a. Local authorities invest in their own services and in independent museums as part of their community planning and community budgeting responsibility.
 - b. Local authorities take a regional development approach, not restricted to local authority boundaries. In due course it may be appropriate to invest directly in regional networks which include 2 or more local authorities and independent museums.
 - c. The Scottish Executive reviews GAE in 2004-5.
 - d. In reviewing GAE, the Scottish Executive considers ring fencing funding streams for local authorities, linked to the regional development approach.
 - e. SMC in consultation with local authorities develops detailed ‘adequacy’ standards in parallel with the review of GAE in 2004-5.
 - f. SMC in consultation with local authorities develop detailed guidelines for Best Value.

SMC

- 7.14 SMC has been the catalyst for change in the museum sector since 1998, when we led the development of the first ever National Strategy for Museums. The National Strategy has provided the basis for debate and action since publication in January 1999.

SMC has been recognised in Ministers’ presentations to parliament as the main advisor to the Executive and the main channel for Scottish Executive funding to non national museums and galleries. SMC’s role as strategic leader for the sector has also been recognised, for example in the Scottish Executive/Cosla guidelines and in the National Cultural Strategy 2nd report Nov 2002. SMC has developed

and delivered the outstanding National Audit and also led the current consultation on behalf of the Scottish Executive.

- 7.15 SMC therefore has both the track record and credibility to act as the National Development Agency. However it is not fully resourced or recognised by the Scottish Executive to fulfil this function and there is no doubt that there is a need for an intermediary which has more effective recognition from the Scottish Executive. The SMC Board has carefully considered the arguments for and against a new strategic agency.
- 7.16 We envisage that if a new agency is a possibility, the Scottish Executive would be undertaking more detailed consideration and consultation, including fully costed options. However, the arguments for and against a new agency can be summarised briefly.

The advantages of a new agency would be:

- there is an opportunity to create a genuinely national remit which includes NMS, NGS and Glasgow and may extend further eg oral history organisations, science centres
- there would be clarity and consistency in the Scottish Executive/museum interface
- the greater status of a new national organisation would lend weight to the advocacy role within the Scottish Executive and others eg local authorities
- there would be clarity in areas of public function eg Freedom of Information, e-government requirements. At present SMC aims to observe the standards required of public bodies, but is not formally required to do so.

Consideration of a new arms length intermediary was a recommendation of the National Strategy. However SMC as an organisation has significantly developed and matured since 1999 and the arguments against a new agency therefore include:

- SMC's outstanding record as catalyst for change provides the case for building on the strengths and structures we already have
- SMC already meets the Scottish Executive's own criteria for an NDPB in terms of function. *"A body which has a role in the processes of national government but is not a government department or part of one, and which accordingly operates to a greater or lesser extent at arms length from Ministers."*⁴⁴
- SMC already exceeds the accountability, transparency and e delivery requirements of conventional NDPBs

⁴⁴ The Scottish Executive Public Bodies: proposals for change 2002 page 17.

- The SMC Director is already the designated Accounting Officer: there is therefore already upward accountability and a implicit recognition of SMC's status.
- loss of momentum would be considerable at a critical point for the sector
- the cost of winding up SMC, including possible loss of VAT relief and charitable status. Decisions regarding the future of RCAHMS will be a significant precedent.

7.17 So far as the structure of a new agency is concerned, there are arguments for and against a membership base. The arguments in favour of a membership base are:

- it provides modern and creative governance which ensures both upward and outward accountability
- it provides direct accountability to stakeholders
- there is the flexibility to respond to rapidly changing circumstances, as SMC has already shown
- there is greater stakeholder involvement in the development of national policies and standards
- because of the relationship with members, including the elected Board, the whole organisation is in touch with reality at every level.

The arguments against are:

- a conventional NDPB is more easily understood
- a conventional NDPB has more status, although this has more to do with older practices and perceptions than modern governance
- the argument has been advanced that "a membership organisation cannot make hard choices", although many do not accept this view, citing SMC's record as an example of the ability to make strategic choices
- members can withdraw. The example is given of Glasgow's withdrawal from Cosla.

7.18 The critical question is whether funding will be delivered via the agency or not: any organisation, whatever the structure, will have difficulty providing leadership and delivering strategic change if there is no financial leverage⁴⁵.

7.19 The SMC Board believes it is essential to have an organisation with a genuinely national remit, which allows all museums, including NMS, NGS and Glasgow, to be

⁴⁵ *National Strategy for Scotland's Museums p12-13, Scottish Museums Council*

considered as integral parts of a sustainable national framework. The consultation made it clear that for members the creation of a new agency is not a priority but that funding and development of regional capacity is far more important than a new agency as such. SMC is a wholly credible vehicle for that funding and development and there is strong support for maintaining a membership base which provides a modern approach to sectoral and organisational governance. Nevertheless the Board recognises that a membership organisation may not be the preferred option for the Scottish Executive as the primary funder of a national organisation.

- 7.20 Our recommendation is therefore that there should be a managed transition to a new national organisation which has a genuinely national remit and clear national objectives. Planning for the new organisation should be a key development task for SMC to a timetable agreed with the Scottish Executive, with the transition to be achieved no later than April 2006. SMC would adopt the project management approach so successful in delivering the National Audit, creating a Design Group which draws both from the sector and from non sector organisations. SMC would undertake wide ranging consultation and advocacy, ensuring the necessary support of the sector for the changes.
- 7.21 This would be a unique opportunity to create a modern organisation with a new constitution which not only has a national remit but demonstrates modern governance in the sense of providing both upward and outward accountability. It is vitally important that an organisation which aims to provide sector leadership is an exemplar of good practice. SMC already exceeds the accountability and transparency requirements of conventional NDPBs and the structure and culture of the new organisation should demonstrate similar high standards.
- 7.22 Such a managed transition to a new national organisation is a dynamic and cost effective means of achieving sectoral coherence without losing the credibility, expertise and momentum for change which SMC has built up over the last 3 years.
- 7.23 Meanwhile, unless and until a new agency is created, SMC from 2003 should focus on its role as a national development agency. This role is already reflected in our mission statement. The development role should be explicitly recognised and promoted by the Scottish Executive which should recognise SMC as the effective national agency. This requires little or no change to SMC's corporate objectives which are:
- Promote recognition of the essential role played by museums in the life of Scotland
 - Promote the role of museums in contributing to the learning society
 - Make museums more socially inclusive and accessible
 - Enable museums to develop their potential by promoting good management, high professional standards and the effective use of good resources
 - Develop a national strategy for a sustainable museums network in Scotland and make sure this is implemented

- Operate effectively and efficiently and always provide value for money in our activities.

7.24 In practical terms this will mean some refocusing of activities.

- There will be a greater commitment to advocacy and partnership at appropriate levels including greater advocacy at senior levels of local authorities and with organisations such as Historic Scotland, VisitScotland, RACHMS and the National Archives of Scotland.
- There will be a greater commitment to developing, monitoring and maintaining standards. The linkage of funding and standards will make this a key role for a refocused SMC.
- SMC would be the vehicle for enhanced investment in the sector. For an outline investment programme (see 3.26-3.28)
- SMC is likely to have a greater role in research and information gathering eg impact and evaluation studies (see and maintaining the currency of National Audit data (see 4.24).
- SMC will withdraw from some areas of activity, in particular the provision of conservation (see 4.18 and 4.20).

7.25 SMC's funding base is currently inadequate to fulfil this role, bearing in mind there has been no increase in core funding since 1999. The management fee for administering the Strategic Change Fund underpins the current SMC budget and staffing. With no increase in core funding, SMC is vulnerable to exactly the problems which many museums face namely that project funding (in our case the management fee) to a large extent supplements funding for essential core responsibilities. If this source of funding disappears, there will be a double jeopardy in a sense of direct loss to SMC and our ability to provide support and services, as well as loss to museums by way of grant. It is essential that, as a minimum, the SCF management fee is consolidated as baseline funding for SMC from 2003 with additional resources for maintenance and expansion of the National Audit, and for design and implementation of a targeted investment programme.

7.26 Recommendations

- a. The Scottish Executive funds a managed transition to a new national agency by April 2006
- b. Unless and until a new agency is established, the Scottish Executive formally acknowledges and appropriately funds SMC as the national development agency.

National Institutions

- 7.27 Throughout the consultation SMC sought views on the role of the National Museums of Scotland and the National Galleries of Scotland. From our own perspective, SMC has welcomed involvement of NMS and NGS staff in SMC initiatives over the last 3 years. Staff have been active members of the National Audit Steering Group, the National Audit Significance Panel and the ICT Task Force. There is also liaison between education staff and particularly with the documentation department of NMS. There is undoubtedly scope for greater efficiency through better forward planning, including co-ordination of Corporate Plans, and reviewing arrangements for project management. We hope this co-operation will continue and improve irrespective of any changes in the status of SMC.
- 7.28 From a different perspective, one of the most interesting aspects of the consultation was the growing recognition of the support which NMS and NGS already offer to non national museums, although there is nothing in the governance, management structure or reporting mechanisms which currently reveal or facilitate this support. NMS and NGS representatives indicated they would like to move from a reactive to a proactive approach, but there is general recognition that this requires new policies, structures and resources.
- 7.29 The notion that the nationals should be providing national support as a responsibility rather than on a discretionary basis requires a significant change of approach. The clear recommendation from consultation meetings was that SMC should mediate the delivery of specific services by the nationals, assisting the development of policies, of the service specification and reporting mechanisms (see 4.9-4.14 and 4.21-4.22).
- 7.30 Recommendations
- a. NMS and NGS continue to participate in national initiatives.
 - b. NMS, NGS and SMC consider joint forward planning including co-ordination of corporate plans on an annual basis.

Resource

- 7.31 The remit of Resource in Scotland has been unclear from the outset. This was the subject of detailed representations from Scotland, Wales and Northern Ireland to DCMS at the time Resource was established. None of these issues has been resolved. The gulf between Resource and Scotland may now be so wide that it is unbridgeable by a cross border public authority, certainly an organisation with Resource's current remit and funding. The lack of clarity is the cause of real frustration, not least because of the significant activity and investment which is evident in England and which is not yet mirrored in Scotland.
- 7.32 The existing Concordat between English and Scottish government departments envisages that Resource continue to operate in the same way as the Museum and Galleries Commission. (MGC). Relevant activities of MGC in 1999 were:

- Conservation and environmental advice – advice Resource no longer offers to any museums (not only Scotland but UK wide)
- Security advice, which is currently under review
- Administration of the Acceptance in Lieu Scheme, which Resource maintain
- Standards development and maintenance of the Museum Registration Scheme (see 5.17-5.24).

Over the last 2 years, Resource has introduced cross domain and domain specific planning and activity in England, little of which is touching Scotland. There is clearly scope for Resource and SMC to work in close co-operation in appropriate areas, but there needs to be greater mutual understanding at departmental level as well as organisational level.

7.33 In the course of the consultation, there was some discussion about the merits of a new Museum, Library and Archive organisation for Scotland to mirror Resource. There was limited enthusiasm for this, although certainly recognition that user expectations and technology platforms are arguments in favour of museum, library and archive co-operation both at UK and national level. There was more enthusiasm for a new organisation with a wider heritage remit, possibly reconfiguring some of the current responsibilities of Historic Scotland and extending to oral heritage and archives.

7.34 Recommendations

- a. The Scottish Executive and DCMS clarify the role of Resource in Scotland.
- b. The Scottish Executive and DCMS establish clear performance indicators for Resource's activity as it relates to Scotland.

Partnerships

7.35 There is widespread agreement that promoting effective partnerships should be a key principle of any sectoral development. SMC has been promoting this approach for some time and this is now beginning to bear fruit. Recent examples include:

- The National Audit itself, involving not only NMS and NGS but also the Botanic Gardens, RCAHMS, and the National Archives of Scotland.
- Development and promotion of the Strategic Change Fund which has encouraged some exceptional new partnerships between museums and with non museum organisations.
- SMC's work with HIE and with Highland Council developing the Highland Museum Assessment and acting as partner in Highlands bid for City of Culture 2008.
- Joint submission with other cultural heritage organisations to the recent review of HLF and running joint funding seminars with HLF.

- A working Concordat with Scottish Natural Heritage.

7.36 However the challenges of developing and maintaining effective partnerships should not be underestimated. What has emerged very clearly from the Strategic Change Fund process and our consultation discussions is how complex a concept partnership is, and how the challenge of interaction requires new approaches to organisational relationships, to governance and to leadership as well as to funding.

For individual museums the ability to develop new approaches and particularly to establish effective working partnerships requires extensive investment of time and effort in partnership planning. Planning for partnership includes a clear route for exposition of roles, of resources, of expectations. If this is true of individual projects, it is even more important if partnerships are to be the cornerstone of a new national framework or any aspect of the Action Plan. Clarity of roles and responsibilities and parity of esteem within a national or operational framework are critical if a partnership is to have a meaningful future. This is true not only for national advice and support programmes but in the wider context, it is essential for the long term sustainability of any recommendations for future development of the sector

7.37 Recommendations

- a. Core funding and investment programmes look to embed the development and maintenance of effective working partnerships, including cross domain partnerships
- b. The Scottish Executive recognises the value of partnership by identifying cross departmental resources
- c. Local authorities adopt the regional development approach, working with other local authorities and independent museums
- d. HLF and SMC continue to work in partnership to develop regional capacity
- e. HIE and SE networks invest in the development of regional capacity in partnership with SMC
- f. SMC co-ordinates national initiatives eg national documentation strategy and programme
- g. SMC works with NMS, NGS, Botanic Gardens and others to promote specialist forums
- h. NMS and NGS work with other museums to develop joint exhibitions and programmes
- i. Audit Scotland with SMC and local authorities develops appropriate partnership PIs for local authorities
- j. SMC identifies and provides appropriate training in partnership planning for museums

- k. SMC works with National Archives Scotland, RCAHMS and Historic Scotland to develop cross domain policies eg guidance on access
- l. SMC continues a policy of identifying and disseminating examples of best practice as part of its remit to promote sectoral development.