



# Museum Issues

briefing notes on current topics

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## How Good is Your Museum Service?

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Conference Proceedings



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## Session 1: Setting the Context

### Jane Ryder: *How Good is your Museum Service - the SMC Perspective*

Jane Ryder is Director of the Scottish Museums Council.

Jane Ryder began her presentation by stating that the concept of 'culture' is now accepted as an essential part of the political and social landscape of the new Scotland. The concept of culture now embraces an interest and awareness in cultural heritage and is no longer limited to an interest in performing arts. Culture must be seen as a potent force that deserves serious consideration at all levels of government, both national and local. Through the campaign, *Taking Responsibility*, the Scottish Museums Council (SMC) has argued that there is a national responsibility for Scotland's heritage which is shared by national and local government. As well as specifically examining the issue of standards, this conference is therefore part of SMC's campaign to encourage both national and local authorities to address cultural issues generally and museum issues specifically with the seriousness which they deserve.

At the heart of the renewed interest in culture, it was argued, is a recognition that Scotland's distinctive cultural identity is one of its greatest assets. Museums as the custodians of material culture offer some of the most important platforms from which Scotland as a nation can establish its new identity.

Museums make a significant contribution to the quality of life within a local area. SMC works closely with Highlands & Islands Enterprise who have long had a commitment to developing the cultural infrastructure, now reflected in one of their strategic objectives: *strengthening communities*. In recognition of this, SMC created a new post of Highlands & Islands Museums Development Officer, jointly funded with Highlands & Islands Enterprise. The new Network Strategy from the Scottish Enterprise Network also emphasises the importance of *community involvement* in economic development and *the importance of social issues to the overall economic development of Scotland*. Local museums are one of the obvious channels for such community involvement and should be recognised as vital components of the local infrastructure whether

intended to encourage tourism or inward investment or to meet existing local needs and aspirations.

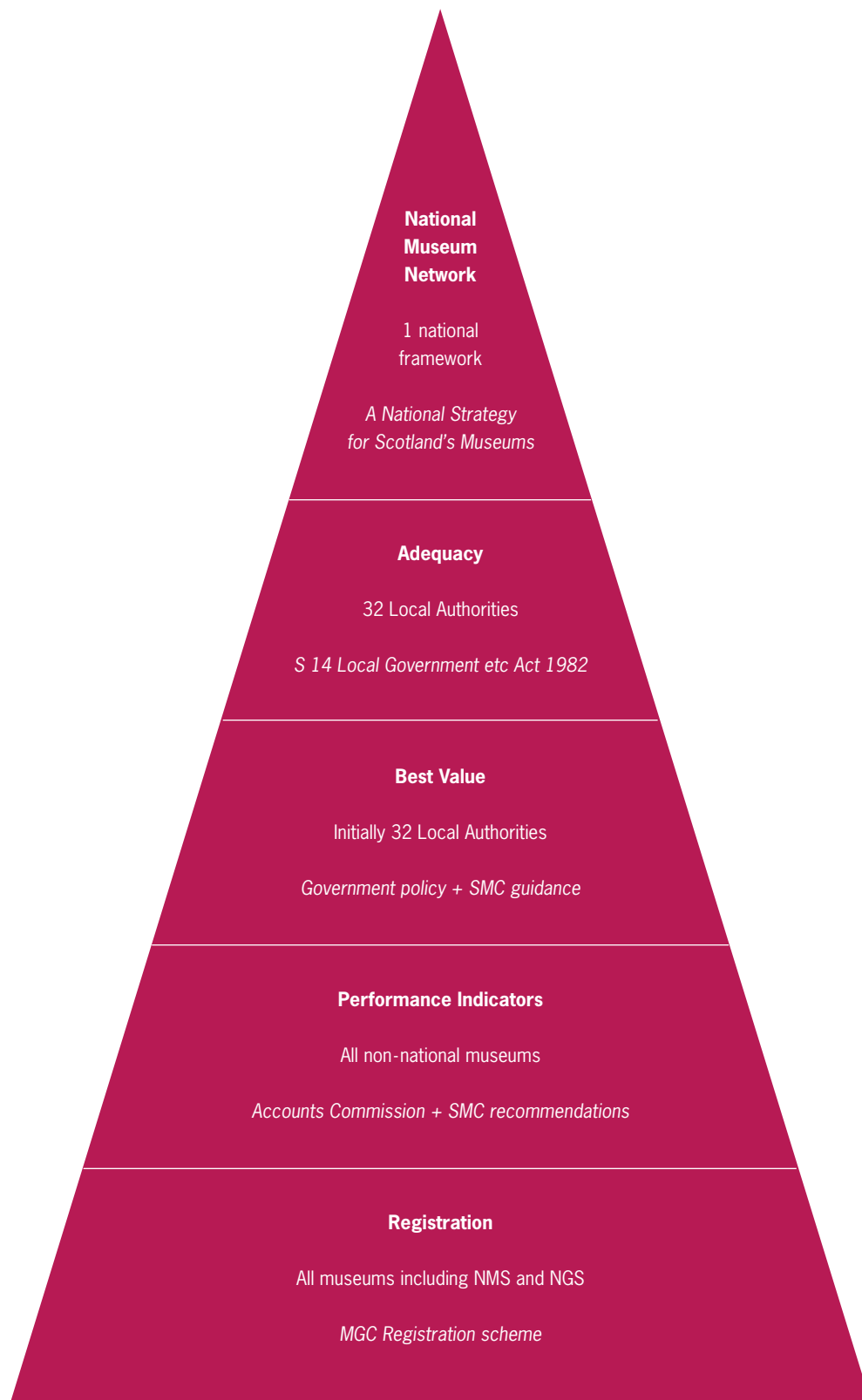
Jane Ryder went on to argue that, regulatory frameworks aside, all of us living in Scotland have a legitimate expectation that, post devolution, there will be a good, indeed excellent, museum service in our area and that this service will be an important part of local community life, whoever manages the service on a day-to-day basis.

However, historically there have been no objective criteria for judging how good a museum service is. There has been a financial and moral commitment from local authorities, reflected in the statutory requirement *to ensure adequate cultural facilities for the inhabitants of their areas*<sup>1</sup> but there has been no guidance, legislative or judicial, on what this requirement means. There have been no performance indicators from the Accounts Commission, and little accurate financial information. Such figures as are available show that local authorities' support for museum services has drastically reduced since reorganisation in 1996. Best estimates suggest that financial support fell by 30% in real terms over the four years from 1995 to £29 million in 1998-9. SMC's latest annual survey indicates that the headlong decline may have been arrested for the coming year - perhaps not surprisingly given the overall local authority settlements.

Jane Ryder proposed the development of a standards framework (see page 3) within which museum services can be adjudged at appropriate levels. The suggested framework represents a model which could be developed, drawing on existing schemes and good practice.

Underpinning any museum service, whether adequate or excellent, must be the Museums & Galleries Commission Registration scheme which sets minimum professional standards for such basics as documentation, collecting policies and legal status of collections. The scheme is voluntary but has been formally endorsed by CoSLA from its inception. The scheme is common to all museums in the UK, national, local authority, commercial, independent, university or regimental, and in Scotland is administered by SMC on behalf of the Museums & Galleries Commission.

<sup>1</sup> s 14 Local Government and Planning (Scotland) Act 1982



Within Scotland, from April 1999, the Accounts Commission has for the first time set performance indicators for museum services. The Accounts Commission consulted with SMC and agreed that the new indicators should require local authorities to report on

- the number of museums operated by or financially supported by the council
- the percentage of those which are registered under the Museums & Galleries Commission Registration scheme.

This will require local authorities to report across all departments and this will not be restricted to direct expenditure. Local authorities should also be required to report on support in kind, which for some authorities can be a significant commitment and can be of great importance to the functioning of independent museums.

The next tier of the pyramid might be more detailed performance indicators which extend into areas not currently addressed by Registration. An SMC Working Party is developing recommendations for detailed performance indicators, drawing on existing practice. The National Training Organisation for the sector, CHNTO, is also currently developing a Benchmarking Guide and the SMC Working Party is considering how this might be adapted or developed for Scotland. It is also agreed that externally validated schemes not specific to museums, such as the Visitor Attraction Grading Scheme, should be considered.

The next step up the pyramid is Best Value. This is currently formally restricted to 32 local authorities but over time will surely be extended to all organisations in receipt of public funding, whether directly or indirectly. Assessment for Best Value has offered local authorities the first real opportunity to review the museum service as a corporate service and in particular to benchmark the service against best practice. An SMC Working Party drawn from local authority professional staff consulted with CoSLA, the Accounts Commission and the Museums Training Institute (now CHNTO) and developed a series of indicators as primary benchmarks, appropriate for inclusion in the first self-assessment process. These initial SMC recommendations, published in *Best Value for Museums: A Corporate Approach*, focus on satisfying corporate aims and rely where possible on existing schemes, particularly those which are externally validated. Four key fields were selected

and suggested tools or strategies that might assist in delivering the key objectives with related indicators:

- strategic considerations, including a requirement to serve the needs of future citizens as well as current consumers
- care of the collections
- provision of services including customer care, education and access
- funding and accountability.

Since publication of the recommendations in late 1998, it has been agreed in principle that SMC should continue to take the lead, in consultation with CoSLA, in developing Best Value guidance and recommendations for local authority museum services. It is hoped that CoSLA will endorse the developed guidelines, as they have already endorsed the MGC Registration scheme. Reporting in line with the SMC recommendations would become an integral part of formal reporting for both Accounts Commission and Best Value purposes. While all the speakers at this conference come from the local authority sector, it is worth emphasising that Best Value is beginning to impact on independent museums as local authorities consider more detailed service level agreements or contracts as a condition of new or continued funding.

Stepping up from Best Value is the statutory requirement to *ensure adequate cultural facilities*. Jane Ryder argued that the legislation requires more than an exercise in relativity: it requires some objective assessment and positive action on the part of local authorities. It is particularly instructive to compare the legislative framework for archives which requires local authorities to consult the Keeper of the Records to ensure that they have in place adequate arrangements for the care of archives.

Certainly it is not at all clear from the legislation what is meant by 'adequate', nor is it clear whether 'facilities' is the same as 'services'. Jane Ryder went on to state that however rigorous the Best Value evaluation, Best Value is not necessarily synonymous with 'adequate' if that term 'adequate' has some objective meaning. The real issue is whether 'adequate' simply means adequate in light of resources available after other priorities have been met, which may be no more than Best Value, or whether there is indeed some objective meaning. The same Working Party that looked at Best Value is also looking at possible definitions of 'adequacy'.

Jane Ryder stated that the SMC view is that there must be some element of professional judgement in assessing whether museum facilities or services are 'adequate'. The recommendation of the SMC National Strategy is for a model which incorporates the concept of peer review already incorporated in Registration. Review should come from outside the local authority peer group and should include a mix of internal and external indicators, some statistical and some descriptive. The areas that need to be addressed are broadly the same as those identified for Best Value, so there is the possibility of progression rather than developing two completely separate regulatory frameworks. This is consistent with the government approach to aligning Best Value and statutory performance indicators where possible.

Finally, at the top of the pyramid, is the need for a single coherent policy framework that is subscribed to and acted upon at both national and local level. SMC consulted widely with members and non-members in the last year to develop a National Strategy which argued the need for such a national policy framework and which showed how museums could deliver even greater benefits with a new approach to planning and funding. The strategy argues the case for increased funding but in doing so recognises the need for greater accountability at every level. A number of the specific recommendations have been mentioned already, but key questions remain such as

- How that accountability might be achieved?
- Who should be administering any regulatory framework?
- What might be the incentives and the sanctions aspects of any new national policy framework?

Jane Ryder continued by raising a series of questions concerning a national museums policy framework under a Scottish Parliament, including: will the new parliament seek to intervene in the issue of museum standards either directly or indirectly? Might and should the Parliament set standards through primary legislation or through an in-house inspectorate? Should this function be delegated and if so to whom? Is an insistence on quality standards an acceptable price to pay for any form of public funding? What sanctions might be applied and how? A more active central government approach could embrace a number of options for sanctions from censure, through adjustment of existing or enhanced Revenue Support Grant to outright intervention. However, it is clearly quite unrealistic to divorce the issue of standards and sanctions from that

of funding. Is there a national responsibility for Scotland's heritage? SMC's view is that we need the commitment of the new Parliament as well as the active participation of CoSLA to ensure the future of Scotland's heritage throughout Scotland. This has been stressed throughout the National Strategy. As one Head of Service commented

*"The Strategy ... provides a framework which enables Museum Authorities to reflect their own needs whilst at the same time offering a strong partnership with SMC to ensure national co-ordination."*

An important element of that partnership is the recognition that local government has a key role and attendant responsibilities and that amongst these responsibilities is the joint development of standards - the topic to which the rest of this conference is dedicated.

### **Ashley Pringle: The Influence of Community Planning**

*Ashley Pringle was speaking as a consultant from a background in local government leisure services not specifically museum services. His presentation focused on Community Planning and Cultural Service Provision.*

Ashley Pringle's main theme was that Community Planning is a major opportunity for cultural services to assert its place at the centre of local government policy concerns and service planning. It is also fortunate that Community Planning was entering the local government agenda at the same time as the Scottish Museums Council was developing its National Strategy so enabling one to inform the development of the other.

Community Planning is rooted in the recognition that local authorities are no longer necessarily the direct provider of services to the local community. The 'externalisation' of service provision and the effects of the Best Value Regime led local authorities to seek to forge partnerships with their local communities, key local agencies and the private sector.

Community Planning should be recognised as one of the central government's key policy 'planks' and is fundamental to the changing role of local authorities as enabling and co-ordinating bodies. A key principle behind the Community Planning reforms is to reinvigorate local democracy through the promotion of community involvement in services planning.

The timetable for Community Planning is

- 5 'Pathfinder' councils to pilot schemes in Community Planning. Due to report back in March 1999.
- Full introduction of Community Planning across Scotland in September 1999. Local authorities are to have the key role in co-ordinating agencies in their area including: Local Enterprise Companies; Health Boards/Trusts; the Police, etc.

There are a number of key issues for local authorities that need to be addressed in the implementation of Community Planning:

- 'ownership' of the process. So far, there has been little public awareness of Community Planning, what it is and what it means
- the impact on local authorities - will Community Planning strengthen or weaken local authorities, especially as it may mean that their role of direct service providers will be eroded
- a 'top down' or 'bottom-up' process - there is a danger that the Community Planning process may become dominated by the professionals and the agencies and that popular participation will be marginalised
- a bureaucratic or a popular process?
- whose priorities lead the process: those of the local communities or of national government?
- how to determine local representation in the process and avoid domination by special interest groups
- how to resolve conflict between participants
- how to make this a real engine of renewal and not just a paper exercise.

But what is the impact of all this for cultural services in general and museums in particular given the opportunity for synergy between the Community Planning process and the SMC's National Strategy with its aim to *rebuild the cultural neighbourhood*? Again, a number of key issues for cultural services and museums services need to be addressed:

- so far, cultural services have played a subordinate role in the pilot Community Planning projects - the agenda has been seized by others

- definitions of adequacy and service standards beyond the Museums & Galleries Commission Registration scheme
- 'externalisation' of service provision which may lead to independent status for local authority museums. Ashley Pringle argued that this may or may not be a good thing, depending upon whether the change leads to increased community 'ownership' of the service
- resources and in particular how to identify realistic multi-agency funding contributions for the national heritage sites.

Ashley went on to argue that museums can make a unique contribution to the Community Planning process as museums

- represent local identities and the heritage of the area. Museums raise questions of how local communities developed their specific character and their possibilities for the future. But to do these effectively, museums need to overtly embrace issues surrounding local conflicts and controversy
- are the repositories of local information
- are, or should be, focal points for local arts and cultural activities, especially for the visual arts - museums need to clearly identify themselves with the local active cultural community
- are popular in themselves, as is shown by every survey.

Museums need to demonstrate their value to their local communities but value is very difficult to quantify readily, as the Accounts Commission discovered. Ashley Pringle argued that museums should look to recent research in the social impact of cultural activity<sup>2</sup> and especially using surveys to establish visitor satisfaction, as well as the impact for the museum visitor in terms of improved skills and knowledge, changes to the perception of the local environment, increased involvement in local projects, etc., which can all be used to reinforce arguments for the importance of cultural services and the need to give their role due recognition in Community Planning.

2 See for example, Matarasso, F et al (1997) *Use or Ornament? the social impact of participation in the arts*. Bournes Green: Comedia



Ashley Pringle went on to highlight the ways in which the Scottish Museums Council's National Strategy was linked to the Community Planning approach through

- the concern with quality and standards
- emphasising user involvement in service planning
- taking a structured approach to a range of service provision
- a recognition of the need to test and not just assert the economic rationale for cultural provision
- a realistic approach to the level of resources available.

Ashley Pringle finished by giving a list of actions he felt museums should undertake in response to Community Planning

- to raise the awareness of museum staff in Community Planning
- to raise the awareness of museum users in Community Planning
- to find a local champion to draw attention to the case for cultural services
- to demand to be involved in the Community Planning process
- to develop arts, cultural and heritage plans in line with the Community Planning process
- identify meaningful standards of service provision
- lobby politicians
- avoid bureaucratising the process, which is the greatest threat to genuinely inclusive Community Planning.

### Jon Harris: Best Value – the CoSLA Perspective

Jon Harris is Head of Policy Development at CoSLA and a member of its Best Value Task Group.

Jon Harris began his presentation with a brief overview of the development and implementation of the Best Value Regime to date.

The process began in May 1997 with the establishment of a Task Group involving CoSLA, the Scottish Office and the Accounts Commission to develop the Best Value framework. At the same time, the moratorium on CCT (Compulsory Competitive Tendering) was extended for a further year.

The Task Group agreed its first report in July 1997 and the key principles and essential elements of the concept of Best Value were in place. September 1997 saw the deadline for the submissions to the Secretary of State by local authorities on self-assessment and implementation plans for Best Value.

By July 1998, a second Task Group report was published developing the performance planning framework and the concept of Public Performance Reporting. This was followed by a second round of submissions of implementation plans in September to December 1998 and the announcements on this round of submissions was made in March 1999.

Jon Harris went on to outline the future developments which would include a final Task Group report in July 1999 making recommendations for long term arrangements for Best Value and in particular the case for legislation. It was envisaged that the Public Performance Reporting framework would be in place by Spring 2000, so completing the Best Value framework in Scotland.

CoSLA welcomes the approach which the Best Value Regime means for local government in Scotland as it

- emphasises quality as well as cost
- is a process of continuous improvement in service provision
- is comprehensive
- emphasises local accountability
- is descriptive not prescriptive
- builds on current good practice
- focuses on achieving success not punishing failure
- helps councils achieve success
- has involved councils in its development
- is a learning process and not a 'soft option'.

The positive aspects of the Best Value Regime were emphasised by comparing it with CCT

Best Value	CCT
Council owned	Government controlled
Comprehensive	Partial
Continuous	Periodic
Cost and quality combined	Cost only
Flexible	Bureaucratic
Co-operative culture	Conflict culture
Integrated with Council's goals	External to Council's goals
Politically led	Management led



Jon Harris then looked at the four essential elements to Best Value as set out by the Task Group:

#### 1. Sound Governance, including

- customer/citizen focus to assess service user satisfaction, priorities and preferences
- sound strategic management with councils setting, communicating and monitoring their broad values, aims and objectives
- sound operational management to ensure that strategic aims are delivered through service planning, performance and review
- sound financial management with rigorous costing systems in place in all service areas.

#### 2. Performance Measurement and Monitoring, including

- valid and reliable performance information for internal management purposes and external accountability through performance monitoring and Public Performance Reporting
- setting performance indicators for comparison with other authorities and against national guidelines and standards.

#### 3. Continuous Improvement, including

- fundamental service/performance reviews, which should be
  - comprehensive – covering all council services and activities
  - regular – every 3 - 5 years
  - transparent – open to external assessment and auditing
  - rigorous – setting performance levels and targets; involving the customer/citizen; include external comparisons; time-scales for action; option appraisals and justifications for final decisions
- activity-based costing.

What has been shown in reviews completed to date is that the quality of reviews is variable both between and within councils; there is a need to develop review and appraisal skills; and the need to take a more strategic approach in defining the schedule of service reviews.

#### 4. Long Term Planning and Budgeting

- the Task Group recommended that the annual local authority budget system be replaced by three year rolling budgets to improve long term planning. Jon Harris reported that little progress had been made in this area.

Future priorities include:

- ensuring that Public Performance Reporting builds on existing good practice in reporting to the public, e.g. fitness for purpose by recognising the different reporting needs of different stakeholders including service users, council staff, voluntary sector, etc.
- ensuring that Best Value is delivering better outcomes through service reviews, outcome orientated performance indicators and through investing in staff development and training
- developing a culture of continuous change through focusing on the needs of the customer/citizen
- integrating Best Value with the Community Planning process.

The cost of failure in implementing Best Value would be great

- prescriptive rather than permissive legislation
- agenda becomes set by the Parliament and not local government – a loss of ownership
- a culture of continuous improvement becomes one of defensiveness and highlighting and punishing failure
- a focus on meeting the needs of auditors/inspectors and not necessarily those of the local community
- issues of quality of services becomes dominated by issues of costs.



## Session 2: Best Value Case Studies

### John Stewart-Young: *Benchmarking – the Experience in Dundee*

John Stewart-Young began his presentation with a brief background to Dundee City Council's experience of benchmarking and Best Value to date.

Dundee City Council has an integrated Arts and Heritage Department which operates and manages all its museums, arts facilities and, of increasing importance, funding arrangements with other providers in the City. These include such organisations as the Dundee Rep, Dundee Contemporary Arts, the national companies and in the case of museums, the Dundee Heritage Trust and HM Frigate Unicorn. The funding of external providers now takes over one third of the Arts and Heritage Department's revenue budget per annum.

For the first round of Best Value, two areas of the service were selected to allow the development of an understanding of how to operate Best Value: Technical and Specialist Services, the section which deals with conservation, exhibition, installation, lighting, photography etc. and the Caird Hall which is a multi-purpose complex of halls. Both of these services appeared to be capable of market testing or benchmarking and met the criteria of accounting for 20% of Departmental expenditure.

In April 1998, two separate Best Value review groups were set up in the Arts and Heritage Department with representation from all interested parties, including an officer from Management Services. All nine Team Leaders in the Department were put on to one or other Best Value review group so all could gain experience prior to their own review.

Corporately, the Council undertook 83 Best Value reviews in 1998/99 but this approach, it was felt, had led to an arbitrary segmentation of services rather than a more holistic approach. For the next round of reviews, the City Council have followed a recommendation from the Best Value Officers Group to undertake fewer but larger reviews. Consequently, during 1999/2000, all heritage services will be reviewed which will represent 32% of the Department's 99/2000 revenue budget.

Now at the end of the process, reports have been prepared for committee identifying the critical success factors of each service reviewed and putting forward a continuous improvement programme for each service.

John Stewart-Young went on to state that the 99/2000 programme will see the development of ways to market test or benchmark the heritage services.

Dundee is in an interesting position, he stated, in that there is a well developed independent museum sector in the Dundee Heritage Trust which operates Discovery Point and the Verdant Works. To take a simple efficiency benchmark against these facilities might provide useful information for a continuous programme of improvement and in particular, gauge value for money. However, the relationship between the services provided by the Council and Dundee Heritage Trust is a long and interesting one where many of the burdens of research and development, the carrying of comprehensive collection storage and maintenance and provision of 'free' public services have been carried by the Council. To benchmark a service that is so wide-ranging against a specific 'visitor attraction' with little of the overheads of backup would not lead to any real answers.

Furthermore, the Dundee Heritage Trust is very much focused on attracting support from commercial sponsorship and individual and business patronage. This it does very well. It is also the recipient of substantial public funding through European Funding programmes, Scottish Enterprise Tayside and the Heritage Lottery Fund. It is, however, unsafe to assume that such support could be further expanded to subsidise the Council's own heritage services. Indeed, to place the whole of provision into a position of such dependence would certainly not be the way of guaranteeing our heritage for the future. However, the Council is very active in accessing external funding wherever possible to develop its services and facilities.

Having a mixed heritage economy, John Stewart-Young argued, was the best possible way of guaranteeing that a wide range of heritage services are being provided for the citizens of, and visitors to, Dundee.

In view of all this, a benchmarking exercise will be undertaken with perhaps one or two local authorities, including Perth & Kinross Council to see what might be learned. As the process develops, it may become clear that for there to be effective benchmarking, a number of partners may have to be located to cover all areas within the Arts and Heritage Department.

In finding a benchmarking partner, it is necessary to have a shared understanding of what benchmarking is. John Stewart-Young stated this as succinctly as possible, as a focused and structured approach to comparing with others on how you provide services and how effective you are in providing those services. The critical words are 'focused' and, it was felt, 'structured'.

This is because, to make meaningful comparisons, there must be a focus on a measurable area. Plainly, if it can't be measured accurately, there is little value in attempting to make a comparison. Also, it is of critical importance when benchmarking to use the same measure.

The purpose of benchmarking is to develop continuous improvement and better practice. However, it is important to recognise that each institution is governed by differing priorities in each of its areas of operation as well as in terms of leadership, resources, culture, attitude or the needs of its customers.

This dilemma can be reconciled by focusing on operational specifics rather than replicating entire processes even though these processes need to be understood to understand the operational specifics. Therefore, the benchmarking process requires not only the collection of benchmarks but also the understanding of the reasons why they differ between local authorities and institutions.

The areas being looked at as benchmarks in Dundee range from Museum Registration and Investors in People, to per capita cost per visitor, number of exhibitions and events to the number of days closure due to maintenance. Data is also being collected on external funding received, and percentage compliance with various corporate procedures such as customer complaints.

John Stewart-Young concluded that the main message from his experience to date was:

- to remain focused

- collect accurately
- relate to your own circumstances and structure
- above all, keep it simple.

The single most important thing being to keep an open mind and consider all alternatives. Something which has now become part of the culture of Local Government in Scotland.

### **Mike Taylor: Benchmarking – the Experience in Perth & Kinross**

Mike Taylor began his presentation echoing a point made by John Stewart-Young that the differences between museum services cause a great deal of difficulty in establishing a consistent methodology for data comparison.

Mike Taylor went on to claim that whilst there have been museum collections in Perth since 1784, the current service is the best that has ever been available in the local community. The difficulty comes in trying to prove such a claim. Perth Museums have been commended by STB, had its per capita spend measured by CIPFA at £5, been measured against MGC collections standards and SPECTRUM procedures but what does such information tell you about the quality of the service and how it can be improved?

In Perth & Kinross Council, the museum service (consisting of Perth Museum & Art Gallery, the Fergusson Gallery and Alyth Museum) now forms the core of the Arts and Heritage Division of Leisure and Cultural Services. Over the next two years, Leisure and Cultural Services will be conducting reviews of 17 areas of its wide-ranging services. Within these reviews, as in all others, there is no escaping benchmarking. However, the experience to date has not been promising. In the area of arts development, for example, willing comparators and benchmark partners have not yet been mainly due to differences in time-scales and priorities between councils.

In discussing what benchmarking is, Mike drew attention to the difference as expressed by the Accounts Commission between analysis of benchmark data and benchmarking itself:

*One of the most common misconceptions is that benchmarking is simply comparing numerical levels of performance across different organisations... Benchmarking is about understanding why there*

*are different levels of performance between organisations and this involves looking in detail at the way services are delivered and managed and at the processes and activities involved in service delivery that lie behind the benchmark levels of performance.*

Performance measures (raw data) have been collected in Perth for over a decade. The figures relate to key areas of activity: visitor figures; staff lectures - frequency and audience; education activities; enquiries for information from the public; collections enquiries and visits; accessions and bequests; loans in and out, etc.

But, Mike Taylor stated, contextualisation of this data is vital or it tells you nothing meaningful. Museums with major collection responsibilities in a particular area of Scotland, for example, may have modest visitor numbers compared with a less well-endowed collection closer to a major settlement or tourist route.

Benchmarking must involve the analysis of processes and it must show how you can provide a greater than 'adequate' level of service. Some of the primary benchmarks, which have been defined with SMC, are a major step in the right direction. Until a more detailed framework is developed, these primary benchmarks, which involve a degree of external validation, provide a sound jumping off point for more aspirational measures which involve identification of best practice.

The benchmarking process should focus on those areas that really count in delivering the aims of the institution. For museums, these must be the broad areas of collections management and visitor services. Within these areas will be processes that can be analysed and compared with what is seen as best practice. Mike suggested there is a role for the Scottish Museums Council and Museums & Galleries Commission in the development of standard exemplars for use across the sector.

Also, it was pointed out that the qualitative element of the visitor experience should not be ignored. Do high visitor figures equate with quality of visitor experience? Has the museum service enhanced the quality of life or contributed to an individual's personal development? Such questions should be included in any evaluation of museum services<sup>3</sup>.

So, in terms of benchmarking activity, as with Best Value itself, the message from Mike Taylor was don't panic, don't rush in, consider what your needs are and ask is this data really needed? Is this process crucial to success? Find someone to talk to and bounce ideas off and don't restrict yourself to one benchmarking partner, be selective.

### **Peter Stott: Making Sense of Best Value**

*Peter Stott, of Falkirk Council, emphasised that this presentation is a personal perspective, concerned with the practical issue of translating the stated intentions of a council into effective action at the point of delivery.*

Peter Stott began by outlining the overall implementation process for Best Value in Falkirk Council. The Council made its Best Value submission to the Scottish Office in September 1997. The submission was well received by the Scottish Office, as it did not take present operational circumstances for granted and demonstrated the Council's absorption of principles at the root of Best Value. Also, by attaching an action plan, the submission indicated specific actions designed to develop Best Value within the Council's operations.

The Museum Service received a copy of the Best Value document soon after submission, so that an assessment of what, in broad terms, was required could be made. It was less easy to identify an implementation strategy to ensure that the Museum was introducing Best Value into its operations in the most effective way. There were guidelines and seminar overheads in abundance, and there were demands for information, all indicating the urgency of the need to attend to Best Value. However, the intense activity did not form itself into a controlled process whereby the requirements of Best Value could be effectively integrated into all levels of the Council's operation.

It was not, Stott believed, the intention of the Council's policy managers to impose a centralised implementation strategy on constituent services (a view confirmed in discussion with one of those policy managers), but to expect such strategies to be formulated within distinct areas of operation, with the centre more concerned to satisfy itself that the objectives of Best Value were being met. This was a perfectly valid approach in that it allowed those with the knowledge of localised circumstances to tackle

<sup>3</sup> For a methodology for such evaluations see Matarasso 1997 op cit

the issue in the most appropriate manner. However, a further difficulty for the Museum was instability within the umbrella department, with a number of changes in senior staff and a major restructuring, and this impaired the ability of officers to produce implementation plans within their own areas of operation.

So it was difficult for the Museums Service to get a handle on Best Value owing to the lack of structure and sheer volume of information in circulation. Additionally, there was not, until the end of 1998, a secure departmental support structure which would have provided the confidence that any proposed programme of activity would have a secure future.

Nevertheless, a number of positive steps have been taken.

From the plethora of information and directives on Best Value, service review seemed to emerge as the main focus of attention around April 1998. A comprehensive review, Peter Stott argued, enables rationalisation of what is done and why it is done in a particular way. From this platform spring all considerations of determining future directions, change and improvement.

By this time, the major development of Callendar House had been completed, with the final phases opening to the public in March 1998. It was intended to do a service-wide 'stock-taking' exercise following the completion of the Callendar House development, and so a Best Value review was taking full advantage of circumstances. Whereas others in the Council have chosen to review aspects of their services, the Museum Service would be examining its work across the board.

Comparison with other organisations was to be done using a two-tier approach.

The first tier compares the service provision with other organisations in such broad aspects as visitor figures and visitor profiles, budgets, numbers and structures of staff, marketing, and the emphases within the overall operation of particular areas of service delivery. This is being done with the museums services in Paisley and Kilmarnock - both local authority services. Consideration is being given to finding another comparator from the private sector, particularly from the point of view of business and financial development.

The second tier consists of comparisons with other organisations in relation to particular aspects of the service, for example in collections management, in design and exhibitions, in security, in education etc. In each area of operation, comparisons have been made with three or four other organisations, and the comparisons have been carried out by the staff within our museum responsible for those areas of operation. The process was initiated with a series of group meetings with the staff concerned, in order to explain the objectives and to establish levels of understanding. These meetings were followed with discussions with individual members of staff to establish the content of questioning that would be pursued with each comparator.

The information is being refined into a coherent report. Peter Stott argued that this process has given Falkirk Museum the best foundation it has ever had for informing its future development plans, and will move the service further along the road to satisfying the requirements of Best Value. Falkirk's experience, Stott concluded, provides an example of a local authority museum service attempting to capture the Best Value agenda.

### **Bridget McConnell: Community Involvement in Museum Services**

*Bridget McConnell is Director of Cultural and Leisure Services for Glasgow City Council and was formerly Service Manager with Fife Council's Community Services Department and Principal Arts Officer with Arts in Fife.*

Bridget McConnell began her presentation by stating that promoting community involvement in museum services should be an obligation under local and national government initiatives as well as being a hallmark of a positive civic society. Through the Best Value Regime, there is an opportunity to develop a more dynamic relationship between local communities and local government.

Central to this new relationship is the Community Planning approach which puts the interests of individuals and communities at the centre of the planning process and ensures that policy responds to real needs. But for this approach to be truly successful, it requires a real change of culture and planning processes within local government and museum services.

Through the experience at Fife's citizen juries, etc., it was shown that people want to be included in policy development. Such consultations promote a more inclusive style of government, can lead to new structures and means of delivery, including decentralisation of service provision, and increase accessibility to services as provision becomes more closely linked to meeting real needs.

Local authorities are the best placed organisations to address the complex needs of citizens and meet their economic and social needs. But cultural concerns need to be central for any economic and social development initiatives to be successful.

But what does community participation in museum services actually mean? 'Community' is itself a, mainly positive, myth loaded concept. But in reality, communities can also have negative and oppressive connotations. Also, it needs to be asked what is actually meant by community in the context of museum services. Is it the museum visitors or non-visitors as well? Communities are complex and diverse phenomena and this fact needs to be recognised in community involvement in museum services.

Bridget McConnell stated that it is important to ensure that local history museums include all members of the local community in their collections, exhibitions and events, especially contemporary community groups such as people with disabilities, gay groups, etc. It is also important that local museums reflect on and engage with local controversial events, issues and debates – the use of oral evidence can be particularly useful for this. But, it should be remembered that the quality of what is being delivered is vitally important, people are not interested in poor quality exhibitions, projects, performances, etc.

Community involvement in museums can take many forms including through partnership with other services, for example, working with social services in developing reminiscence kits. What is key to the process is that real dialogue takes place between individuals and the museum and consultation is not just an afterthought bolted on to the planning process.

Bridget McConnell argued that to do this effectively, museums need to become focused on community dialogue and move away from object based collecting. Museums should become real forums of debate

within and between communities, and through this museums can become central to the process of democratic renewal, community development and Community Planning.

Bridget McConnell concluded with a brief outline on how Best Value was being implemented in Glasgow. The first stage of a Best Value review into libraries had been completed. The review of museums, visual arts and heritage is due to begin in June 1999. This review is to be cross-departmental as well as involving local communities, local organisations as well as the national agencies. A key part of this review would include consideration of Information and Communication Technologies to increase access to services especially for schools.

### **Herbert Coutts: What would Constitute 'Adequate Provision'?**

**Herbert Coutts is Acting Director of Recreation for the City of Edinburgh Council.**

Herbert Coutts began his presentation by stating that in many ways the question itself – what constitutes *adequate provision*? – should be seen as a hang-up from the past. Perhaps the question should be rephrased as *what constitutes a high quality or excellent museum service*?

Herbert Coutts traced the concern with 'adequate provision' back to the Public Libraries Consolidation (Scotland) Act of 1887. This Act embedded the concept of free access to lending libraries and museums justified in terms of the enlightenment and rational recreation – museums as the 'people's university'. Herbert Coutts argued that at the centre of any definition of 'adequate provision' should be free access to a museum's core collections.

He went on to point out that until 1973, legislation pertaining to the provision of museum services by local authorities was enabling legislation, there was no requirement or statutory duty on local authorities to provide any museum service.

This was to change with the 1973 Local Government (Scotland) Act that laid a duty on local authorities to ensure 'adequate provision' of facilities. A duty which was reinforced by the 1982 Local Government and Planning (Scotland) Act. But, as has been discussed elsewhere, neither Act defined what was 'adequate'.



Since the early 1980s, there have been a number of attempts to define 'adequate provision'. In the mid 1980s, the Museums & Galleries Commission, while undertaking a review of the museum sector in Scotland, was asked to provide a definition of 'adequate'. But the review did not seek the essence of any definition of 'adequate', instead it defined 'adequate provision', as being able to visit a museum in a single day round trip by public transport. It was also recommended in the review that, if a local authority was not in the position to spend £100,000 towards its museums service, then provision should be made through independent museums.

The MGC Registration scheme is another form of defining 'adequate' based on professional standards. Therefore, it is not concerned with scale of provision but with systems of service. In its own terms, the scheme has been a great success and has been instrumental in raising professional standards of collections care and display across a range of museums.

The Accounts Commission's key performance indicator for local authority museum provision in Scotland is the number of museums that have achieved Registered status. Therefore, it was asked, is 'adequate provision' currently defined as having one Registered museum in a local government area?

The new Scottish Parliament creates the possibility of a new museums act for Scotland and Herbert Coutts went on to give a number of key points that he felt any new museums and cultural services act should include:

- local authorities should ensure provision of museum facilities as a mandatory duty
- that collections are held in trust for future generations and can only be disposed of in very clear and tightly defined circumstances
- that the core collections of museums must be available to the public free of charge
- museums should be Registered under the MGC scheme or equivalent
- legislation should enforce formal relations between the national institutions (National Museums of Scotland and the National Galleries of Scotland) and local authority museums, so ensuring that the national collections can be seen by the people of Scotland in their localities
- local authorities be required to publish and review their cultural policies
- local authorities should facilitate 'cultural partnerships' in recognition of the range of providers of cultural services able to fulfil local community demands.



## Session 3: Conclusions from the Workshops

### Workshop One: Citizen Juries

The conclusions reached by the workshop included

- that, from the range of ways to consult the public, it was important to select the correct technique to get the information you want, what you wanted to ask and who you wanted to ask
- that it was important to develop the mechanisms whereby the information from such consultation exercises actually fed back in to the planning process
- that such consultations are not a 'one-off' but a rolling part of the planning process so that participants can see how they have changed service provision.

It was pointed out that there was already a degree of cynicism about citizen juries from participants in the workshop.

In addition to the Fife example, it was also noted that York City Council were setting themselves up as a centre of excellence in citizen juries and both Fife and York should be a good source of information and guidance.

### Workshop Two: Benchmarking

The conclusions reached by the workshop included

- that a range of benchmarking partners should be sought to match the different areas of each individual service
- that key service elements should be identified for benchmarking. It was suggested that this could be done through looking at percentage of core expenditure on activities
- that there was a need for support mechanisms across Scotland such as fora to discuss freely ideas, seek benchmarking partners, etc.
- that external accreditation was seen as an important part of the benchmarking process, e.g. Investors in People, TQM, etc.

### Workshop Three: Defining Adequacy

The conclusions reached by the workshop included

- that it was agreed that a statutory framework for museum provision should be retained and refined
- that 'adequacy' was a constantly evolving target and so should be defined by guidelines and not primary legislation
- that the MGC Registration scheme should remain the bed-rock of standards but there was a need to develop further standards looking at service quality and the outcomes of museum provision
- that the National Museums and National Galleries have a role to play in enhancing the quality of provision across Scotland, possibly through a better structure of local and national museum relations though not necessarily enshrined in legislation.

It was suggested that collections should be legally protected as community assets.

Another suggestion was to look at a peer review mechanism to allow the evaluation of local government decisions by external experts.

The review of Northumberland's museum service by Professor Patrick Boylan of City University was suggested as a model. It was also mentioned that the National Museums of Scotland already used external experts to evaluate some of their exhibitions and in certain function area reviews.

Concern was expressed at the idea of community involvement in the evaluation of the technical aspects of the museum service, such as conservation practice, and it was suggested that a distinction should be drawn between non-professional consultation on policy matters and peer review on technical matters.

## Suggestions for Further Reading:

Benchmarking your Route to Excellence - A Self Assessment Workpack for Cultural Heritage Organisations. Cultural Heritage National Training Organisation, 1999.

Best Value for Museums: A Corporate Approach. Museum Issues 8. Scottish Museums Council, 1998.

Getting to Know You. Building and Using an Information Portfolio - A Guide for Service Managers. Accounts Commission for Scotland, 1999.

Guidelines for Strategic Planning: Writing a Heritage Strategy. Museum Issues 6. Scottish Museums Council, 1997.

Local Government Best Value Task Force - Report 1. Scottish Office, 1997.

Local Government Best Value Task Force - Report 2. Scottish Office, 1998.

Local Government Best Value Task Force - Interim Conclusions: Best Value in Local Government. Long Term Arrangements. Scottish Office, 1999.

Measuring Up to the Best: A Manager's Guide to Benchmarking. Accounts Commission for Scotland, 1999.

The Challenge of Charging. Accounts Commission for Scotland, 1998.



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