A G E N D A

Community Services Scrutiny Committee

Date: **Wednesday, 20th December, 2006**

Time: **10.00 a.m.**

Place: **The Council Chamber, Brockington, 35 Hafod Road, Hereford**

Notes: Please note the **time, date** and **venue** of the meeting.

For any further information please contact:

Craig Goodall, Members' Services, Tel/Fax:01432 260445

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County of Herefordshire District Council

HEREFORDSHIRE COUNCIL

AGENDA

for the Meeting of the Community Services Scrutiny Committee

To:	Councillor	A.C.R. Chappell (Chairman)
	Councillor	H. Bramer (Vice-Chairman)
	Councillors	R.B.A. Burke, M.R. Cunningham, Mrs. S.P.A. Daniels, J.G.S. Guthrie, B. Hunt, J.G. Jarvis, D.C. Taylor, P.G. Turpin and A.L. Williams
	Co-opted Members	Ms. C. Jones (Chamber of Commerce), G. Jones (Tourism Sector), Mrs. E. Newman (Herefordshire Association of Local Councils) and Mr. P. Thomas (Herefordshire NFU)

Pages

1.   **APOLOGIES FOR ABSENCE**

To receive apologies for absence.

2.   **NAMED SUBSTITUTES**

To receive details any details of Members nominated to attend the meeting in place of a Member of the Committee.

3.   **DECLARATIONS OF INTEREST**

To receive any declarations of interest by Members in respect of items on the Agenda.

4.   **MINUTES (TO FOLLOW)**

To approve and sign the Minutes of the meeting held on 8th November 2006.

5.   **SUGGESTIONS FROM MEMBERS OF THE PUBLIC ON ISSUES FOR FUTURE SCRUTINY**

To consider suggestions from members of the public on issues the Committee could scrutinise in the future.

6.   **REVIEW OF THE SUPPORT FOR MUSEUMS AND HERITAGE CENTRES**   1 - 68

To consider the findings of the Museum Review Group following the Review of the Support for Museums and Heritage Centres.

7.   **ANNUAL REPORT ON RURAL REGENERATION**   69 - 72

To advise Members of the annual activity in Rural Regeneration within Herefordshire.

8.   PERFORMANCE MONITORING REPORT   73 - 84

To report on the available Performance Indicators position and provide
information about current performance management work within the
Economic and Community Services Division of the Adult and Community
Services Directorate.

9.   COMMUNITY   SERVICES   SCRUTINY   COMMITTEE   WORK   85 - 88
PROGRAMME

To consider the Committee work programme for the remainder of 2006/07.

PUBLIC INFORMATION

HEREFORDSHIRE COUNCIL'S SCRUTINY COMMITTEES

The Council has established Scrutiny Committees for Adult Social Care and Strategic Housing, Childrens' Services, Community Services, Environment, and Health. A Strategic Monitoring Committee scrutinises corporate matters and co-ordinates the work of these Committees.

The purpose of the Committees is to ensure the accountability and transparency of the Council's decision making process.

The principal roles of Scrutiny Committees are to

- Help in developing Council policy

- Probe, investigate, test the options and ask the difficult questions before and after decisions are taken

- Look in more detail at areas of concern which may have been raised by the Cabinet itself, by other Councillors or by members of the public

- "call in" decisions - this is a statutory power which gives Scrutiny Committees the right to place a decision on hold pending further scrutiny.

- Review performance of the Council

- Conduct Best Value reviews

- Undertake external scrutiny work engaging partners and the public

Formal meetings of the Committees are held in public and information on your rights to attend meetings and access to information are set out overleaf

PUBLIC INFORMATION

Public Involvement at Scrutiny Committee Meetings

You can contact Councillors and Officers at any time about Scrutiny Committee matters and issues which you would like the Scrutiny Committees to investigate.

There are also two other ways in which you can directly contribute at Herefordshire Council's Scrutiny Committee meetings.

1. Identifying Areas for Scrutiny

At the meeting the Chairman will ask the members of the public present if they have any issues which they would like the Scrutiny Committee to investigate, however, there will be no discussion of the issue at the time when the matter is raised. Councillors will research the issue and consider whether it should form part of the Committee's work programme when compared with other competing priorities.

Please note that the Committees can only scrutinise items which fall within their specific remit (see below). If a matter is raised which falls within the remit of another Scrutiny Committee then it will be noted and passed on to the relevant Chairman for their consideration.

2. Questions from Members of the Public for Consideration at Scrutiny Committee Meetings and Participation at Meetings

You can submit a question for consideration at a Scrutiny Committee meeting so long as the question you are asking is directly related to an item listed on the agenda. If you have a question you would like to ask then please submit it **no later than two working days before the meeting** to the Committee Officer. This will help to ensure that an answer can be provided at the meeting. Contact details for the Committee Officer can be found on the front page of this agenda.

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(Please note that the Scrutiny Committees are not able to discuss questions relating to personal or confidential issues.)

Remits of Herefordshire Council's Scrutiny Committees

Adult Social Care and Strategic Housing

Statutory functions for adult social services including:
Learning Disabilities
Strategic Housing
Supporting People
Public Health

Children's Services

Provision of services relating to the well-being of children including education, health and social care.

Community Services Scrutiny Committee

Libraries
Cultural Services including heritage and tourism
Leisure Services
Parks and Countryside
Community Safety
Economic Development
Youth Services

Health

Planning, provision and operation of health services affecting the area
Health Improvement
Services provided by the NHS

Environment

Environmental Issues
Highways and Transportation

Strategic Monitoring Committee
Corporate Strategy and Finance
Resources
Corporate and Customer Services
Human Resources

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COUNTY OF HEREFORDSHIRE DISTRICT COUNCIL

BROCKINGTON, 35 HAFOD ROAD, HEREFORD.

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COMMUNITY SERVICES SCRUTINY COMMITTEE   **20TH DECEMBER 2006**

REVIEW OF THE SUPPORT FOR MUSEUMS AND HERITAGE CENTRES

Report By: The Museum Review Group

Wards Affected

County-wide.

Purpose

1.   To consider the findings of the Museum Review Group following the Review of the Support for Museums and Heritage Centres.

Background

2.   At the Committee's meeting on 13th June 2005 a suggestion was received that the Committee consider scrutinising museum provision within the County. This suggestion was noted by the Committee and subsequently added to its work programme at its meeting on 14th December 2005.

3.   At the meeting of the Community Services Scrutiny Committee on 24th March 2006, the Committee agreed to undertake the review and also agreed the Scoping Statement (terms of reference) and the membership of the Review Group.

4.   The Review Group's report setting out the Groups approach to its task, its findings and conclusions is attached.

   RECOMMENDATION

> **THAT   the Committee considers the report of the Museum Review Group and determines whether it wishes to agree the findings for submission to Cabinet.**

BACKGROUND PAPERS
- None identified

Further information on the subject of this report is available from
Craig Goodall, Democratic Services Officer (Scrutiny), on (01432) 260445 or cgoodall@herefordshire.gov.uk

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Review of the Support for Museums and Heritage Centres

Report by The Museum Review Group December 2006

As presented to the Community Services Scrutiny Committee

20th December 2006

…Putting people first
…Promoting our county
…Providing for our communities
…Protecting our future

Quality life in a quality county

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Contents

Appendices

Chairman's Foreword

The Museum Review Group would like to thank all those who have helped to contribute to this report. The Group are strongly committed to the museum service in Herefordshire and hope that our review can be used as a template for the future of the service.

The Group found many interesting artefacts from across the county displaying its rich history.

We were particularly impressed by the calibre of volunteers and paid staff who run the County's museums.

We have carefully examined the museum service and hope that our recommendations are accepted in the sprit they are intended.

I would like to take the opportunity to put on record the group's thanks for the work undertaken by Lara Latcham & Craig Goodall, without whom we would be unable to present the report.

Councillor Chris Chappell
Chairman of the Museum Review Group

Introduction

1. The Museum Review Group was established by the Community Services Scrutiny Committee at its meeting on 24 March 2006. This was following a suggestion from a Member of the Committee, at its meeting on 13 June 2006, that a review of museums should take place. At its meeting on 24 March 2006 the Committee appointed Councillor A.C.R. Chappell as Chairman of the Review and Councillor H. Bramer and Councillor J.G.S. Guthrie and Mrs E. Newman (Co-opted Members) to the Review Group. The Committee made a recommendation that a further Councillor Member be appointed to the Review Group but it was not possible to appoint the extra Member so the Review Group resolved to continue with a vacancy.

2. The purpose of the Review was for the Review Group to gain an understanding of the role and purpose of museums and heritage centres in the County run independently and by the local authority and to perform an appraisal of their value in terms of local and regional provision. The Review Group were also tasked to review the collections held in the County including how they were stored and accessed by the public. Finally the Review Group were required to perform an assessment of the support received by Museums.

3. For further details of the Review Group's terms of reference and Membership please see Appendix 1.

4. The Review took place between June and November 2006 over a series of ten meetings and this report summarises the key findings of the Review and its recommendations to the Cabinet Member (Community Services).

5. The Review Group would like to express their thanks to all the people and organisations who have presented evidence during the Review.

6. Methodology

7. In order to complete the Review it was decided that a number of meetings and visits would be required to take place.

8. The Review Group learnt that there were 17 known independent museums in the County in addition to the local authority operated museums. Whilst it would have been desirable to be able to visit all the known museums in the County in the interests of time and efficiency it was decided that the Review Group would visit a cross-section of the known museums in the County in terms of size and status.

9. In addition to these visits the Review Group wanted to put their local findings into a regional and national context. To this end a meeting was arranged with a selection of representatives from strategic heritage organisations.

10. The Review Group's report has been split into several themed areas beginning with three short sections to help put later sections into context.

11. Naming Issues

12. The Review Group discussed the nebulous nature of the term "Heritage". It was felt that the word could mean any number things, including historic buildings, archives, museums and traditional culture. As such it might not best describe the work done by what is essentially a museum service.

13. The Review Group heard from several members of the Heritage Services team that they frequently receive phone calls asking about permission for changes to listed buildings and that 7 out of 10 telephone callers when greeted with "Heritage Services", hesitate and ask if they are speaking to the museum. The public never referred to the service as 'Heritage', but always as the 'Museum Service' and as the associated services offered by the service

14. However, the term Heritage is used to reflect the diversity of the service, as it does not just run Museums but a host of other services including education and outreach work, care and conservations of collections and special projects such as the creation of exhibitions. However, the Review Group felt that these were still services which it would be reasonable to presume could be offered by a Museum Service.

15. Therefore the Review Group considered that it might be less confusing for users if the service was officially called the 'Museum Service'.

16. The Museums Association Code of Ethics

17. The Review Group came to understand through their work the importance of the Museums Association *Code of Ethics*. This 23-page document sets out in great detail the professional, moral and ethical rules to be followed by museums. In order to be an accredited or recognised museum, and therefore able to apply for Heritage Lottery Grants and many other sources of funding, it is necessary to sign up to the *Code of Ethics*. Herefordshire Council signed up to the *Code of Ethics* in July 2004 and must therefore abide by it or face lack of recognition.

18. Lack of recognition would result in reduced funding opportunities, ejection from networks and the withdrawal of support from regional and national bodies.

19. A copy of the *Code of Ethics* can be found at Appendix 2.

20. Accreditation

21. Museums wishing to be recognised as professional bodies with the opportunity to apply for important funding streams must undertake

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accreditation. Formerly this scheme, a form of benchmarking museums and ensuring that they reached certain professional and ethical standards, was referred to as registration.

22. Accreditation is a new and higher standard which reflects advances in knowledge, collections care and the development of the *Code of Ethics.* Applications for accreditation are currently being accepted by Museums, Libraries and Archives (MLA) the body that awards accreditation. Accreditation is being rolled out in phases with most Herefordshire sites applying during 2006. A document explaining the details of the accreditation process is attached at Appendix 3 to this report.

23. The Review Group wish to recommend that all Museums in the County, operated by Herefordshire Council or with those independent museums with the capacity to do so undertake the accreditation process. The process is beneficial for all concerned and potentially creates opportunities for new funding and accepting loans from other museums.

24. Role and Purpose of Museums

25. The Review Group wished to understand the role and purpose of museums and heritage centres run independently from the local authority. The Review Group visited several sites and spoke to the people who ran and staffed them. Those visited represented a cross section of ownership, size and function. It was found useful to compare the findings from the independent museums with those of the Local Authority (LA) museums.

26. In general:

- The museums in the county provide visitors to the County with cultural attractions and contribute to the tourism package.
- Some private museums are contributing to learning objectives through education programmes and holiday activities and workshops.
- Many of the independently run museums are the visible products of historical societies and local history groups, which represent clusters of experts and repositories for objects and came into being to exhibit the collections that had been amassed.
- Some of the independently run museums offer other amenities such as shops and cafes.

27. Concerning the role and purpose of the LA museums and heritage centres

28. Heritage Services is the repository for archaeological finds for the county and bears the duty of care to collect and preserve objects reflecting the history of the county and its different sites reflect its different roles.

29. Hereford Museum aims to put Herefordshire in a national context and to offer "edutainment" for residents and visitors alike whilst the art gallery takes touring as well as local exhibitions and aims to attract visitors from all backgrounds.

30. The Old House attracts more tourists because of its position, in the centre of Hereford, and its activity reflects that in the shape of enhanced trading functions.

31. The Heritage Centres at Ross and Ledbury try to strike a balance between catering for the tourist and offering community led exhibitions to attract residents.

32. The Museum Resource and Learning Centre is currently attracting more researchers but will be developed in its latest phase to be a learning and resource centre primarily for students and residents.

33. Heritage Services also meets the community's needs through the Museum on the Move (MoM), a fully accessible mobile museum which visits schools and groups in the community as well as through loans boxes and ad hoc loans.

34. Site Visits

35. As mentioned in the methodology section of this report the Review Group decided to visit a cross-section of Museums throughout the County. The Museums which the Review Group visited were:

- **Kington Museum**
- **Butchers Row House Museum, Ledbury**
- **The Painted Room, Ledbury**
- **The Judges Lodgings, Presteigne**

36. For the avoidance of doubt the Judges Lodgings in Presteigne is under the auspices of Powys County Council. However, it is still a member of Herefordshire Museums Forum. The Review Group felt that it would be appropriate to visit the Judges Lodgings to see how another local authority supported its Museums.

37. The Review Group learnt many things about the Museums which they visited and their principal findings will be covered in the remainder of this section.

38. Kington Museum opened in 1986 and was extended in 1991 and 2005. The 2005 extension was the product of a successful Heritage Lottery Fund bid. Butchers Row museum has been running since the early 1980s and is funded through the Ledbury Historical Society. Admission is free but Butchers row has a small commercial operation on the ground floor. Admission to the Painted Room was also free, but donations were solicited.

39. The Judges Lodgings charges admission of £4.95 for adults, £4.50 for concessions and £3.95 for children. Significant reductions are offered to family groups. It opened as a museum in 1997 and comes under the

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auspices of the museum's trust but its manager is seconded from Powys County Council (PCC).

40. It cost approximately £3,000-3,500 a year to operate Kington Museum. This money is raised through donations and sales. No admission fee was charged, as it was feared that this would substantially reduce visitor numbers. The principal donator was the Town Council which provided £750 a year. The Friends Group provided £50 a year. £200-300 a year was raised through sales and £2,000-3,000 a year was raised by the tearoom. All other monies were raised through the donations box. It was estimated that each year £800 was required for insurance, £1,500 for utilities bills and £200 for fire safety equipment maintenance.

41. The Judges Lodgings cost £80,000 per year to run and a small amount of funding was secured from PCC (£9,500) and less still from the Tourism Department (£6,500), which ran a Tourist Information Centre (TIC) from the site. However this arrangement was unlikely to continue as TICs were being considered for closure in Powys. The shortfall in funding was met through a sizeable shop operation, donations and functions such as weddings and parties as well as the occasional TV or film production company using the site for filming. It was recognised that new ways of generating income always needed to be investigated, but that new activities would require extra staffing generating in turn further cost.

42. The museums in Ledbury and Kington were staffed wholly by volunteers. The Review Group learnt that generally Museums found it difficult to recruit new volunteers. Staff at the Judges Lodgings and the Painted Room were paid, but staffing levels were minimal resulting in little supervision of the exhibits.

43. Visitor figures varied widely: Kington attracts 5,000-6,000 visitors per summer season including visits from schools. Butchers Row Museum attracts 14,000 visitors per summer season. The Painted Room attracts about 4,000 visitors per summer season. The Judges Lodgings, which is also open seasonally, gets about 20,000 visitors a year.

44. Kington Museum's building is owned by Herefordshire Council and leased to the museum on a peppercorn rent. Butchers Row House is owned by the Ledbury Historical Society, the Painted Room is owned by the Town Council, who run it. The Judges Lodgings is on a 25-year lease from PCC to the museum trust.

45. The museum staff at Kington expressed an interest in the creation of an insurance partnership, which could operate across the Museums Forum, but no such partnership in the County exists at present. It is not known if this is possible and the Review Group feel that the feasibility of this should be explored.

46. Kington, Butchers Row and Judges Lodgings are all currently going through the Museums Libraries and Archives (MLA) accreditation process

with the help of the Museum Development Officer (MDO) and for the Herefordshire museums with the assistance of a curatorial advisor from Heritage Services.

47. All sites apart from the Painted Room have received grants of various sizes and with varying impact, but all acknowledge the time required to complete the applications is prohibitive. It was also recognised that most funding required match-funding and this created problems as there was often no other funding available to match that on offer.

48. Both Kington Museum and the Judges Lodgings encourage schools involvement in their museums and Judges Lodgings runs popular education sessions about life below stairs. Butchers Row and the Painted Room allowed school visits but space is prohibitive.

49. There was limited physical access to Butchers Row and the Painted Room.

50. The Kington Museum building had been suffering problems by being struck by reversing lorries making deliveries to a nearby shop. It was estimated that the Museum had been struck on numerous occasions and there were real concerns that serious damage could be caused. The Review Group suggests that the Cabinet Member (Resources) investigates this problem and ensures that preventative measures are taken to prevent serious damage to the building.

51. Kington Museum staff often attended community events like the Kington Show or the Kington Steam Rally and had hosted a stall with displays and artefacts.

52. Some concern was expressed about raising running costs in light of the loss of the voluntary sector grants scheme. The Review Group would to remind independent Museums that they can now apply for funding from Herefordshire Council as part of Community Grant Aid.

53. Whilst the Review Group were pleased to hear that Community Grant Funding was available to Museums they learnt that all funding awarded this way was for a period of 1 year. Therefore the Review Group would like to recommend that Museums be able to apply for longer term funding agreements to enable greater planning and stability within the sector. Longer term funding agreements would also increase efficiency as Museum staff, who were often volunteers, would be able to spend less time completing time consuming application forms in addition to this Herefordshire Council would have less forms and applications to process and consider as repeat applications would no longer be dealt with on an annual basis.

54. Appraisal of Value

55. The Review Group wished to try to quantify the value of both the LA and independent museums and it was necessary to put Herefordshire in a national context to do this. The Review Group met with representatives from the regional Museums, Libraries and Archives (MLA) and from the West Midlands Hub (Hub), the significance of which will be elaborated on later. This meeting placed activity in Herefordshire within a regional and national perspective.

56. The regional MLA is a branch organisation of the central government MLA, which is based in London. It is a body that monitors trends and formulates policy, fomenting good practice, networking and promoting workforce development. It also has a small grants scheme. The Hub is the product of a Department for Culture, Media and Sport initiative called *Renaissance in the Regions*, which provided central government funding directly to regional museums for the first time. The Renaissance initiative saw each region of the UK establishing a Hub, consisting of a group of four or five museums with collections of national or international importance. These Hubs were given large injections of cash to improve the services they were delivering with the intention of a cascade effect of shared best practice to other museums in their region. Hubs are not funding organisations and their activities are largely inter-Hub, although some partnership projects have been established outside the Hub museums.

57. The Review Group noted that nationally Museums, Libraries and Archives are grouped together and their strategy and policy developed and monitored by the same organisation. The Review Group learned that although Herefordshire Council's Archives was at one time in the same division as Heritage Services, it was now in a separate directorate. Libraries had entered the same directorate as Heritage Services at the time that Archives had been moved. The Review Group felt that it might be helpful to the three services to be united in the same division due to the clear Heritage links between archives and museums.

58. Heritage Services was placed in a regional context by Michael Cooke of Museums Libraries and Archives West Midlands (MLAWM) and the West Midlands Hub represented by Jane Arthur of the lead museum Birmingham Museum and Art Gallery and Carol Bowsher the Chief Executive Officer of the Hub.

59. Although the Hub does not fund other museums directly it part finances the Museum Development Officer (MDO) scheme and offers free training for museum staff which is disseminated through MDOs and the Hub workforce development department.

60. Museum staff in Herefordshire have received (to date) 68 training places for free through the Hub and some of their training has been delivered at Heritage Services sites. Each training place carries a cost implication to the Hub of £200. Training has included: conservation, climate control,

integrated pest management, MAP management training and many other continued professional development programmes.

61. The Hub acknowledges Heritage Services and the Herefordshire Museums Forum as significant organisations within the West Midlands heritage industry and museums network.

62. The MLA also acknowledges Heritage Services and the Herefordshire Museums Forum as being a significantly active participant in the West Midlands museums community. The Forum is also linked to the Herefordshire Cultural Consortium.

63. The Review Group were pleased to hear this and hope that it continues in the future.

64. The MLA reported that Heritage Services had applied for and received 20-25% of all funding available from this body and that this represented more than its fair share of available funds, but that their proactive approach to applying for funding had produced this high level of success. The Review Group were very pleased to hear this and considered that all opportunities for the training of museum staff in the County should be taken up in the future.

65. The Review Group heard evidence about how Hereford ranked against other museums in terms of Best Value Performance Indicators (BVPI), which all LA museums report on. Museums report on BVPIs 170 a, b and c. Definitions of these as well as targets set for a three-year period can be found at Appendix 4. It should be noted that although these BVPIs are expressed as per 1000 of the population, this does not mean that all visitors are local, it is merely the form of the BVPI.

66. The Review Group learnt that BVPI 170a revealed, in terms of usages per 1000 of population, Hereford ranks 78th out of 178 Authorities with 764 usages per 1000 of the population in 2005/06. The raw data for this BVPI was 137,220 in total usages including Website uses and outreach.

67. The Review Group found through BVPI 170b that Hereford ranked 64th out of 178 local authority museums in the number of visits per 1000 of population. The top museums were predictably in cities like London and Brighton. 693 people per 1000 of the population visited Herefordshire Council Museums in 2005-2006. The raw data is 122,224 visitors to Heritage Services sites for that period.

68. BVPI 170c indicated school use of the service which finds Herefordshire ranked 56th out of 178 with 6,673 school uses during the 2005/6 period.

69. Other available information informed the Review Group that the cost per head of visitor in Herefordshire is £4.22, which represents excellent value for money. The comparisons with other authorities in the West Midlands area had been made in confidence but represented a significantly higher

value for money with bigger budgets failing to attract higher numbers of visitors and cost per head ranging from £5.70 to £15.01.

70. The Review Group gathered some evidence from the State of Herefordshire report which collects data from the Best Value General Survey. The 2006 report shows that 19% of people use 'museums and galleries once every six months' which represented a fall from a similar study in 2003.

71. The Review Group discovered that a survey recently produced by Herefordshire Voice shows that more than half (58%) use museums and galleries now as often as they did three years ago, however, around a quarter use them less often. A quarter of respondents felt that improvements to the variety of exhibitions was needed. Almost two thirds (62%) of respondents considered museums and galleries to be fairly or very important compared to just over one third (34%) who consider them of little or no use.

72. The Review Group learnt that satisfaction amongst visitors to Heritage Services sites was found to be high with both displays and staff. The same was found to be true of Educational services delivered by Heritage Services.

73. The Review Group were informed that although at present there is no formula to calculate the impact of museums and heritage or to demonstrate its social and economic impact there were a number of studies currently on going.

74. Firstly the Review Group heard that, Bolton Metropolitan Borough Council who commissioned Jura Consultants to examine the economic value of museums, libraries and archives through a process of contingent valuation.

75. This methodology measures the economic impact of a services through the individual's willingness to pay for it, whether or not they are regular users. The British Library used the same approach in 2003 to asses its value to the UK economy. A summary is given in the Museums Journal for November 2006, but this does not include the data below which was made available at a recent Museums Association Conference.

	Actual cost of operation per month	Value placed by users (per month)	Value placed by non-users (per month)
Museum	£1.16	£2.77	£1.14
Library	£3.33	£3.33	£1.00
Archives	£0.17	£1.83	£0.68
TOTAL	£4.66	£7.93	£2.82

76. The consultants expressed some surprise that the value of museums and archives was set far higher by users than the actual cost of the service but that users seemed to know how much the library service cost to run.

77. In the case of museums, users value them at more than double the actual cost of delivering the service and non users at approximately the cost that the service costs to deliver. The value placed on archives was even higher, but the value placed on libraries by non-users was less than a third of the actual cost of the service.

78. As those people who used the services valued Museums so highly and even non-users were valuing the service at close to its cost price the Review Group felt that this showed how highly regarded the work of Museums was considered by the public.

79. Secondly, Shropshire County Council have commissioned Morris Hargreaves McIntyre Consultants to develop a tool to measure the value of culture (Culture in Shropshire comprises museums, arts, archives, libraries, archaeology and countryside). This tool is able to take input from a wide range and style of evaluation methods aimed at the diverse audiences and styles of service and events and to allocate them via a sophisticated database system.

80. Shropshire are currently refining this tool and will be looking for benchmarking partners to trial the next stage of development. Heritage Services has expressed an interest in undertaking benchmarking on this.

81. The Review Group look forward to hearing that Herefordshire has been chosen as a benchmarking partner to continue this important study.

82. **Relationship between independent and LA museums and the Council**

83. The Review Group was informed that the County of Herefordshire was served by an independent body called the Herefordshire Museums Forum. It was also told that a Museum Development Officer (MDO) existed with the remit to support and advise museums in the county. As mentioned earlier the post is funded by WMMLA and the Hub and has recently been upgraded to a full time position.

84. The MDO is the intermediary for the Hub workforce development training, Renaissance at Work (RAW) as discussed above. In the financial year 2005/6 Herefordshire received £30,441 from the West Midlands Hub through the MDO post. This money not only pays the MDO's salary but also funds training and finances small grants. Similar levels of funding have been agreed to the end of the financial year 2007/8.

85. The MDO gives 400 hours of time to independent museums per year and in addition coordinates 250+ hours of Heritage Services staff time to support the museums. In the financial year 2005/6 the MDO made 62 site visits.

86. Since the MDO has been administering grants (2004) 7 grants have been awarded totalling £5,329. Grants are available up to £4,000. Independent museums in the county have been slow to take advantage of the grants, but the fund is starting to take off now.

87. The Review Group are pleased to report that feedback from private museums shows a high level of satisfaction with the MDO project and the Review Group wish this work to continue.

88. Herefordshire Museums Forum

89. Private museums in the County are able to join the Herefordshire Museums Forum, an independent body used as a networking and knowledge-sharing organisation. The Forum has 17 members and is supported administratively by the MDO.

90. The Forum is seen by its members as a support group that offers networking opportunities, but that it in no way regulates or represents the museums that join it. The Review Group learnt that it could be difficult to get the Forum to consider policies covering all museums and joint marketing strategies. The Forum members valued their independence and were wary of schemes that they perceived to undermine this independence.

91. The MDO provides professional advice and support and coordinates curatorial advisors from Heritage Services for Museums Forum members as well as administering a small grants scheme.

92. Review of Collections and Assets

93. The Review Group set out to review what the county's museums owned, how they were cared for and how these objects might generate income for the sector.

94. The Review Group learnt that collections throughout the county are rich, varied and invaluable as objects for learning and enjoyment. The Review Group were shown Hoovers, a Purple Heart military medal and many more objects that help to tell the story of peoples' lives in the county.

95. The collections are being cared for well, especially in view of the excellent training being offered for free from the Hub through the MDO. Training from the Hub as well as the need to apply for Accreditation has led to an improvement in standards of care and awareness of the needs of objects.

96. The collections held by Heritage Services are being cared for in exemplary fashion in the state-of-the-art resource centre at Friar Street, which is amongst only a handful of such facilities in the world.

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97. The Review Group were presented with copies of the Museums Association *Code of Ethics* and as a result learned that Museum collections should not be considered as assets as they have no financial value in themselves, their value lying in the evidence they give about the past. Museums preserve objects in order to meet with their duty to offer cultural entitlement to their communities. Heritage Services and all registered museums work under certain constraints concerning the loaning of objects and must comply with the Museums Association *Code of Ethics*.

98. As part of meeting the need to offer cultural entitlement to the local community objects can be accessed by the public at predetermined museums and by appointment at the resource centre. Objects also go out into the community through Museum on the Move, loan boxes, reminiscence boxes and ad hoc loans. The Review Group feel that it is important to note that Heritage Services currently generates no significant income from this service.

99. **Detailed consideration of loans: current situation and what might be possible considering the activities of other museum services**

100. The Review Group met with the Community Heritage Officer and heard about the current situation concerning loan boxes and ad hoc loans. The constraints concerning such loans and the cost of setting them up were all explained.

101. Heritage Services is responsible for a number of activities including: loans, the handling collection, Reminiscence, Discovery and Cultural Roots boxes.

102. Reminiscence boxes were aimed at older people and often used by community groups and organisations, for example residential homes and day care centres, for general activities and talking points or more seriously to aid the treatment of dementia patients. Items in Reminiscence boxes could be handled, as there was no requirement to preserve the objects contained in them for the future. 100 loans of Reminiscence boxes have been made between January 2005 and August 2006. The possibility of loans is advertised through fliers in the museum and on the Website and requests are received by front of house staff in the Museum and are then passed on to the specific team.

103. Discovery boxes were similar to Reminiscence boxes but aimed at post-16 year old people who are not in formal education. The Discovery boxes were sponsored by the Clore Duffield foundation for the sum of £6,000. This was one finite project with a limited time span to create the boxes.

104. A charge of £5 per box was required for each loan although there was no restriction on the length of time an organisation could keep the box for.

105.	The Review Group learnt that there was a high cost to Reminiscence, Discovery and Cultural Roots boxes. For example for the Cultural Roots boxes to be produced the following costs were necessary:

£200 for Plastazote foam
£365 for 20 boxes
£400 for a technician to cut foam and pack boxes
£2200 for artefacts
£3165 in total

106.	As well as developing the different type of themed boxes Heritage Services does develop other new resources, for example: Stonebow Unit Project. Here a work experience student produced a piece of work which formed a collection of photographs of Herefordshire festivals throughout the year as a resource which could be used to help jog the memory or provoke thought by patients in the Stonebow Unit at Hereford Hospital. This relatively simple project which involved using resources from local collections took a work experience student one week to produce.

107.	Heritage Services had made 16 ad hoc loans in the last year. These loans were to individuals, schools, organisations and community groups and were arranged on request. No charge was made for these loans as it is felt that the community owns the collections and should not be charged to use them.

108.	In order to action a loan request there are a number of preparation steps which needed to be undertaken which can take up a lot of staff time. For example, a recent proposed display at Hereford Hospital required the following steps to be undertaken and completed satisfactorily before any loan could be made: the environmental conditions at the site were assessed along with the display space, it was necessary to arrange insurance and address ownership issues of the items, and finally the loan would need to be monitored whilst it was on loan to ensure that the necessary conditions were being adhered to. These factors needed to be observed to the highest standards if a loan from the permanent collection was being made. This is because Heritage Services' primary duty to the permanent collection is to protect and preserve the objects forever or for as long as possible.

109.	When completing assessments for loans it is necessary for Museums Staff to take into account the 10 agents of deterioration:

1. Fire
2. Flood
3. Theft
4. Biological decay – e.g. insects
5. Chemical decay – e.g. rust
6. Physical damage
7. Incorrect humidity
8. Incorrect temperature

9. Incorrect lighting
10. Curatorial neglect

110. It would be necessary for any organisation to satisfy the above conditions in order for a loan from the permanent collection to be made. This assessment could take a member of staff a few days to complete the checks to the required standards.

111. In order to loan an object from the permanent collection it would be necessary for the following steps to be completed:

1. Visit to loan venue
2. Environmental check of venue
3. Insurance – e.g. Judges Coach £350 for 6 weeks
4. Prepare artefacts for loan: condition report, conservation, re-framing
5. Pack artefacts ready for transportation
6. Deliver and mount artefacts
7. Spot checks throughout duration of loan
8. Collection of artefacts
9. Condition check of artefacts
10. Return artefacts to store

112. The Review Group were informed that many organisations loaned objects on a regular basis, even organisations which were not Museums. For example, the Leicestershire Open Museum was set up entirely as a loans based organisation. Similarly the Scottish Cultural Resource Association Network (SCRAN) licences images of artworks for use by organisations and individuals. SCRAN charges by the image. A similar venture for the West Midlands had been planned by Renaissance West Midlands but did not materialise. Reading Museums Loans Service charged £250 per loans box in addition to all other associated costs.

113. The Review Group learnt that if Herefordshire Council were to create a dedicated loans service then it would be necessary to establish an initial capital investment programme and two new full-time staff members. For example, in order to establish a dedicated loans service it was estimated that the following resources would be required:

•   Two full-time members of staff (£42,500)
•   Suitable show cases to loan to venues (£6,140)
•   Graphic Display Panels (£8,000)
•   Plinths, stands and blocks for display purposes (£300)
•   Exhibition preparation facilities and storage.
•   Transportation in order to deliver and collect loans. Lease Van (£3,000 pa)

114. Overall it was estimated that approximately £100,000 would be required to establish the loans service in its first year and then £57,000 pa after that. As a contrast the Review Group learnt that the Museum on the Move exhibitions cost £25,000 pa.

115. The Review Group noted the costs necessary to create and operate a dedicated loans service were unlikely to be recouped by fees in loaning objects.

116. The Review Group investigated what other museums do to generate income from loaning collections. This included finding out whether or not any Museums operated a separate 'hiring collection'.

117. Preliminary research on the websites of numerous Museums worldwide revealed no evidence of any museum operating a separate hiring collection. Some evidence was uncovered with regard to how other museums loan/hire items from their collections.

118. For example, a company in Cheshire, which was not a Museum, specialised in loaning schools resources which were focused on historical areas of the school curriculum, principally the Romans and Aztecs. This same company also made corporate loans. However, loans to private individuals were not available.

119. Reading Museum operated a corporate membership scheme. In return members were able to use the Museum for one corporate event per year and were able to borrow certain specified items. The items were available to loan for one year and came in their own self-contained display cases after conservation assessments at a small charge. It was important to note that only 'durable' items were available to loan. See Appendix 5 for further information on Reading's Corporate Membership scheme.

120. The Review Group learned that the National Maritime Museum have a selection of paintings which have been restored and protected which can be loaned out in self contained environmental frames. A loan costs £3000 per annum and the service is very popular. One of the conditions of the loan is that the painting has to be made available to view by a member of the public on request.

121. The National Army Museum had stopped loaning objects due to unacceptable level of loss and damage. Safety of objects is high in the Museum Code of Ethics.

122. In Shropshire it was known that a Dentist with a shop front borrows items from the County Museum Service to display in the window. This is not charged for as it is considered as part of Shropshire's community outreach programme.

123. Outreach work takes place in Herefordshire. For example, Artic Circle based at Rotherwas borrowed some items originating from the munitions factory, which had been based at Rotherwas during the war and displayed them on their premises.

124. The Review Group considered the evidence and felt that it would be good for Hereford Museum to establish a corporate membership scheme. It was thought worthwhile identifying a few items, which were capable of being loaned which could then be loaned to corporate members in return for a fee. If it was the case that benefits in kind could be provided to the Museum Service then the fee for loan could be waived.

125. A situation which could aid this was that from 29 September 2006 all Heritage Services artefacts can be insured away from Herefordshire Council premises provided the locations meet a range of criteria for security and adequate environment. Previously this had not been the case which meant that a person or organisation loaning an artefact would have had to pick up their own bill for insurance which in the case of smaller organisations could be the difference between being able to afford the loan or not.

126. It was noted that items from the permanent collection could be loaned provided all the necessary checks were taken and the item would be displayed in a public area. (See procedure outlined above).

127. The Review Group felt that Corporate Membership was a good avenue to pursue as it would provide links with local businesses, which could provide mutually beneficial relationships as well as income from the potential loaning of objects. It was noted that Corporate Members could later become Trustees if the Museum service chose to take that path.

128. The Review Group felt that there should be different levels of corporate membership available, similar to what is available at the Courtyard Centre for the Arts, so that no organisation was priced out of becoming a Member.

129. Generating income from donations

130. The Review Group wanted to consider ways in which Museums could generate additional income to support their activities.

131. One avenue which the Review Group investigated was the possibility of museums being able to sell goods which had been donated to them but, for whatever appropriate reason, were not able to keep.

132. The Review Group learnt that generating income from items offered to a museum would be considered as trading in cultural property. Whilst the proposal put forward by the Review Group to generate income from unwanted donations prior to accessioning is so unusual that it is not mentioned specifically in any guidance there are a number of clauses in the *Code of Ethic*s which taken together show that this activity would not be viewed as ethical. The following passages are quoted directly from the Museum Association *Code of Ethics*:

2.15 Avoid all activities that could be construed as trading or dealing in cultural property unless authorised in advance by the governing body.

Refuse to deal in any material covered by the museum's acquisition policy. ….

5.18 Refuse tactfully but firmly to accept a gift or bequest if items offered do not meet criteria set out in the museum's collecting policy. Explain why the museum is unable to accept an offer of a gift or bequest.

5.19 Refuse in writing any unwanted or unsolicited gifts even if the museum has been advised that they need not be returned. Consider informing intending benefactors, or their representatives, about other registered museums, archives or other public institutions that may be interested in the unwanted items.

6.13 Refuse to undertake disposal principally for financial reasons (either to raise income or decrease expenditure)

133.   Whilst the Review Group were disappointed that this avenue of creating additional revenue for Museums was unlikely they appreciated the spirit of the *Code of Ethics* as a protection mechanism for heritage around the world.

134.   The Review Group were disappointed to discover that any donations made at a Herefordshire Council Museum were counted as part of the services budget as an income generation target. The Review Group felt that this practice was unfair and that donations made at a Museum should no longer be counted as an income generation target. Any donations made at an individual Museum should be retained by the venue at which the donation was made rather as additional income.

135.   Finding a sustainable future for Museums

136.   The Review Group was concerned about the sustainability of LA museums considering their non-statutory status and their vulnerability in the face of cost-saving exercises. It was felt that considering the important work that Heritage Services is undertaking it would be wise to plan a sustainable future.

137.   The Review Group investigated possible strategies for survival and a debate took place about the advisedness of Heritage Services moving to trust status.

138.   It was discovered that Adrian Babbidge an independent consultant working for the Museum Association had investigated every museum that had transferred to Trust Status in the UK and concluded that it was not a way to save money. Although it is important to note that there have been some success stories.

139.   For example, Scarborough Museum is in the process of transferring to Trust Status and has managed to secure a valuable long term funding deal

from the local Council. Scarborough Museum had recently advertised for a Chief Executive with a salary of £48,000 pa.

140. It was noted that Scarborough Museum had a unique selling point. Its Museums are of specific scientific interest and dinosaur footprints can be viewed in the area. The Museum also has a high-powered Trustee – Lord Darwent, who is thought to have high-level business contacts. Two years of planning had been necessary before the conversion could take place.

141. It was also to be noted that many of the museums seeking trust status had collections of national importance or a unique selling point. Advice from Council Officers highlighted this, pointing out that successful trust museums all held collections of national significance or which were unique to a specialism.

142. In addition to Scarborough it was noted that the Horniman Museum in London had moved to Trust Status and transformed its African Collections into an internationally renowned collection with excellent learning and visitor facilities. The Review Group felt that this Museum had very strong connections with its local population and a highly specialist collection.

143. In Ludlow, an active Friends Organisation had established a fundraising trust, which had raised £250,000 in donations from local contacts. It was noted that this was similar to the corporate membership idea discussed earlier.

144. In contrast there were unconfirmed reports circulating that Stroud's transfer to Trust Status had not provided any benefits. Trust Status had seen budget reductions and the loss of accountability.

145. Additionally, Quarry Bank Mill, Wilmslow, Cheshire had established itself as an independent trust and saw its budget gradually dwindle until the Trust had to hand over its assets to the National Trust.

146. The Review Group thought that Trusts would still have more access to additional funding streams than Local Authorities, even though Heritage Services has an excellent record of raising external funding. The long term funding deal awarded to Scarborough Museum Trust was a good and stable way of funding a Museum which had transferred to Trust Status. Whilst it was appreciated that it could also be an uncertain path to follow it was noted that budget cuts could be just as likely within a Local Authority environment as Museums were a non-statutory service.

147. The Review Group felt that it the Cabinet Member (Community Services) should consider developing Hereford Museum Service as a single-entity. It was felt it would be better to limit the conversion of trust status to this single entity as it would be a more focussed organisation with clearer boundaries that would be easy to manage. Conversion to trust status would also allow the creation of more income generation practices, for example a cafe, to be implemented, even if they were away from the

main museum premises. This would not be possible by a local authority operated museum.

148. It is also felt that Trust status may reduce the vulnerability of the local authority museum to budget cuts. The Review Group feels that the valuable work completed by the Heritage Services team is in danger of being put under financial pressure due its status as a non-statutory service. Therefore a move to trust status with a long term funding agreement similar to that awarded in Scarborough would protect this valuable service for period of time.

149. If this recommendation is accepted then the Review Group felt that the Museum Development Officer should be encourage independent museums to develop links with the new Trust so successful partnership arrangements can be developed.

150. Conclusions

151. The Review Group conclude that Museums in the County looking after a rich variety of objects for people to enjoy.

152. The Accreditation process is raising the standards of the County's Museums and seeing the wide spread implementation of the Museum Association Code of Ethics. Herefordshire Museums Forum is providing a fantastic network for Museum staff to share knowledge and expertise. This is combined with the high number of regional training places which have been received by Museum staff in Herefordshire which is helping to create a highly skilled workforce to deliver Heritage to Herefordshire.

153. Museums in the County are a doing an excellent job providing educational and cultural facilities to the people of Herefordshire as well as providing many varied facilities for tourists to visit which are highly valued.

154. Most Museums are in need of additional funding. To aid income generation Heritage Services should establish a Corporate Membership scheme and donations should no longer be counted as an income generation target. To aid the financing of independent Museums it should be made possible to apply for long term Community Grant Funding.

155. It is suggested that the Local Authority Heritage Services transfer to Trust Status with a long term funding agreement and that independent museums in the County complete Accreditation and apply for Herefordshire Council's Community Grant Funding.

Recommendations

That:

(a) **consideration should be given to reverting to the title 'Museum Services' to identify the service currently known as Heritage Services;**

(b) **as Museums, Libraries and Archives are grouped together nationally, it should be considered that the three services should be grouped in the same Herefordshire Council division to enable easier cross discipline partnership;**

(c) **all Herefordshire Council Museums and those independent Museums with the capacity to do so in the County should be encouraged to complete the Museum Associations Accreditation process;**

(d) **Hereford Heritage Services should research and consider the possibility of converting to single entity trust status;**

(e) **if Hereford Heritage Services does convert to a single entity trust then any funding agreement with Herefordshire Council should be long-term;**

(f) **it is to be hoped that the Museum Development Officer project will continue through the support of the West Midlands Hub and Museums, Libraries and Archives;**

(g) **independent museums in the County should be reminded that they can apply for Community Grant Funding;**

(h) **it should be made possible for Museums to apply for longer term Community Grant Funding than the one year agreements currently available;**

(i) **the possibility of a partnership insurance scheme for the Herefordshire Museums Forum members should be explored. This could be pursued by the Museum Development Officer on the Forum's behalf;**

(j) **a small hiring collection should be established to loan objects along the lines of the Reading Corporate Loans scheme;**

(k) **a formula should be developed to measure Heritage's impact on both tourism and also to demonstrate its social and economic impact;**

and;

(l) **preventative measures should be taken to protect Kington Museum from being struck by reversing lorries to a nearby store.**

REVIEW:	Support for Independent Museums and Heritage Centres	
Committee:	Community Services Scrutiny Committee	**Chair:** Councillor Chappell
Lead support officer:	Lara Latcham, Visitor Services Officer	

SCOPING

Terms of Reference
This review covers:
An understanding of the role and purpose of museums and heritage centre run independently from the local authority
An appraisal of their value in terms of local and regional provision
Their context in connection with local authority run heritage centres and the City Museum
Review of collections and assets held by the local authority and independent museums, including how objects are stored and accessed by the public
An assessment of what support independent museums and heritage centres receive and additional support required

Desired outcomes
• To gain an understanding of the role of independent museums and heritage centres, including how they are run, what purpose they service for the wider community and their relation to similarly run local authority facilities
• Recommend what additional, new support should be given to the independent museum and heritage centres and where that support should come from
• Look at increased ways of linking local authority and independent facilities together to best use resources
• Feed findings into the Heritage Strategy being produced for the County

Key questions

- What is the activity and purpose of the independent museums and heritage centres e.g. operating venues, holding collections, run education programmes

- Is there a market for museums and heritage centres, and what are the audience figures and impact on tourism and community development

- How are independent museums and heritage centres run e.g. volunteers, trusts status, part of a wider organisation, are facilities free, how is income raised

- What current support is given, in kind and in cash

- What are the links with Herefordshire Heritage Services and at a regional level Museums, Libraries and Archives

- Are there ways the independent museums and heritage centres could work together to gain more

- What are the areas of need to develop

Corporate Plan Priorities

To sustain vibrant and prosperous communities, by providing more efficient, effective and customer-focused services for communities, including clean streets

Timetable (some of the facilities are only open seasonally and will influence the time table)

Activity	Timescale
Agree approach, programme of consultation/research/provisional witnesses/dates	July 06
Collect current available data	July to August 06
Collect outstanding data	September 06
Analysis of data	October 06
Final confirmation of interviews of witnesses	September 06
Carry out programme of interviews	October 06
Agree programme of site visits	July 06
Undertake site visits as appropriate	August and September 06

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Update to Community Services Scrutiny Committee	October 06
Final analysis of data and witness evidence	November 06
Prepare options/recommendations	December 06
Present Final report to Community Services Scrutiny Committee	January 07
Present options/recommendations to Cabinet	February 07
Cabinet response	March 07
Implementation of agreed recommendations	April 07 onwards

Members	Support Officers
Councillor Chappell (Chairman)	Lara Latcham – Visitor Services Officer
Councillor Bramer	Craig Goodall – Committee Officer (Scrutiny)
Councillor Guthrie	
Mrs Newman	

museumsassociation

codeofethics formuseums

ethical principles for all who work for
or govern museums in the uk

*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.*

1

codeofethicsformuseums

Why does the museum sector need a code of ethics? To that question, probably the best answer is: to be helpful. Think of this code as a philosophical map that identifies important landmarks, preferred routes and difficult terrain; everyone who is involved in any aspect of the management and development of museums can use it as a navigational aid.

Ethics is the systematic analysis of questions of 'right' and 'wrong'. Such considerations are inevitably based on values that change over time and vary between cultures. Professional ethics, by definition, should serve the public interest by encouraging behaviour that benefits the communities served by a profession and prohibiting activities that may cause harm to any of those communities. Practitioners who place the public good before their own interest are acting ethically, and are therefore behaving professionally. So, a code of museum ethics represents and articulates a set of consensual values and standards of behaviour that are agreed at a particular time to define a relationship of trust between the museum and the communities it serves. While the interaction of museums and society is necessarily varied, complex, many-layered and dynamic, it must always be based on mutual respect if it is to remain healthy and beneficial.

This code replaces the previously separate Codes for Museum Governing Bodies and People Who Work in Museums. It is, however, much more than a fusion of these codes, and represents an ethical analysis reflecting the evolved social context of museums. It is structured around ten core values that society can expect museums to uphold. These, in turn, grew out of the definition of a museum that the Museums Association adopted in 1998. This identifies 'inspiration, learning and enjoyment' as central to the experience offered by museums to their users, and the special responsibility of museums to 'collect, safeguard and make accessible artefacts and specimens which they hold in trust for society'. Perhaps the ten core values of this code that derive from this definition would not look amiss reiterated near the entrance to any public museum in the UK, prefaced by the museum's own statement of purpose.

No matter how carefully considered and worded, a code is only one aspect of professional ethics. Museum ethics go well beyond the formulaic. Museum ethics are about understanding the many forms of interaction between museums and society, and understanding how that relationship is mediated through actions and attitudes at both individual and institutional levels. These will be apparent through a kind of ethical body language expressed by the museum around issues of openness, stewardship, honesty, humility and inclusivity. There is literally no aspect of the work of the museum that is free from ethical value.

I am greatly indebted to the many colleagues from every kind of museum, who took the time and trouble to comment on the consultative draft of this code. The new Code of Ethics for Museums could not have been created without the unstinting efforts of Christine Johnstone, Maurice Davies and above all, Ratan Vaswani, who laboured so patiently and skilfully in writing its many iterations. The Ethics Committee also played an indispensable role as a critical sounding-board in the code's development.

This Code of Ethics for Museums is not merely the result of intense activity over the past two-and-a-half years. It stands on the shoulders of twenty-five years of ethical development in the UK and overseas museum sectors. I hope that it will be useful for a time. While some of the landmarks it describes may be durable, this code, like any map, will itself be superseded as the cultural landscape – the social context of museums – changes over time.

Tristram Besterman
Convener,
Museums Association Ethics Committee, 1994-2001.

For advice on ethical matters or information on ethics training please contact the Museums Association at the address shown on page 2 of this booklet.

How to use this code

You will need to exercise judgement in applying the principles set out in the Code of Ethics for Museums. A number of sometimes competing considerations may need to be balanced. An ethical decision does not usually depend on a choice between 'right' and 'wrong' but between competing 'rights'. There is nothing wrong, for example, with a decision to 'accept financial support from commercial organisations...' (10.6). However, it would be unethical to accept such support if it is offered only on condition that the museum advertise a company's products on exhibit labels. Guidance on interpretation and application of the code can be sought from the Museums Association, which may refer matters to its Ethics Committee for a definitive judgement.

Exercising judgement is required not only in assessing alternative courses of action but also in determining the extent of your responsibility as an individual. All those who work for or govern museums should endeavour, in their particular role, as far as it is within their power to do so, to ensure that the principles of the Code of Ethics for Museums are upheld in their institution or practice. Sometimes responsibilities lie very directly with individuals. It is, for example, the particular responsibility of event organisers to refer to 6.5 and to ensure that they 'Pay due regard to safeguarding collections and the public's right of access whenever museum premises are used for functions.'

However, all who work for museums do so on behalf of the museum's governing body, which has ultimate responsibility for policy and decisions affecting the governance of the museum. Responsibility may not therefore lie solely with an individual, but that individual should take responsibility for encouraging and assisting colleagues and the governing body to act ethically. For example, members of staff whose duties do not include organising functions should discuss with senior staff any concerns they may have over restrictions on public access when functions are held. Senior staff should give due consideration to legitimate concerns and assist the governing body to address them in setting ethically sound policy in this and all other key areas.

Members of governing bodies and policy

Members of governing bodies should be familiar with the code in its entirety. Their attention is drawn in particular to the following sections and points in the code: section 1; section 2.0 to 2.12; section 5.0 and 5.1; section 6.0 to 6.2, 6.9 to 6.14; and section 10.

The code should be referred to when defining the mission of a museum and in any policy development.

Ethical and legal obligations

The Code of Ethics for Museums defines standards that are often higher than those required by law. It is, however, self-evident that the code cannot override the legal obligations and rights of those who work in or for museums, including those arising from any contractual relationship there may be with an employer, or client. The code represents the consensus view of members of the Museums Association, which includes both those who work in museums and the institutions that employ them.

The Museums Association therefore encourages employers to assure adherence to the Code of Ethics for Museums as a contractual requirement. An effective way of achieving this is to include reference to upholding and promoting the Museums Association's Code of Ethics for Museums in job descriptions that form part of an employee's contract of employment.

The Museums Association also recommends that adherence to the code should be used as a standard requirement in contracts between consultants and their clients.

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The Code of Ethics for Museums must be subordinate to the legal powers and obligations of governing bodies responsible for museums and the legal powers and obligations of individual members of such bodies. However, the Museums Association believes this Code's provisions to be in the best interests of the public and therefore urges all museum governing bodies (and where appropriate, subsidiary, subcontracted or delegated bodies such as executive committees, contractors or managing bodies), formally to adopt it.

The Code of Ethics for Museums and other voluntary standards

Ethical standards developed by the Museums Association have informed the national Registration scheme for UK museums at an institutional level. Registration is administered by Resource, the Council for Museums, Archives and Libraries.

The Museums Association supports the work of specialist organisations in the UK whose members are involved in museum work and who may produce their own codes of ethics and ethical guidelines. The Museums Association can help in cross-referencing to these codes and guidelines and in referring enquirers to appropriate sources of specialist advice.

The Code of Ethics for Museums is consistent with the Code of Ethics for museums worldwide produced by the International Council of Museums (ICOM). The Museums Association supports ICOM's work.

The Museums Association encourages its members to support international conventions relating to museums whether or not these conventions have been ratified in the United Kingdom, where consistent with this code and the law.

This code and membership of the Museums Association

The Museums Association is registered as a charity. It is a non-governmental, independently financed membership organisation providing services to and reflecting the interests of museums and those who work for, and govern them. The Code of Ethics for Museums outlines ethical principles for all museums in the UK. The code applies to members of staff, paid or unpaid, to consultants and those who work freelance, to members of museum governing bodies, and to those who work for or govern organisations that support, advise or provide services to museums, including the Museums Association.

The Museums Association expects all members to uphold and to promote the Code of Ethics for Museums as a professional obligation. To achieve Associateship of the Museums Association (AMA) members must demonstrate awareness of the code and the ways in which it is used. To achieve Fellowship of the Museums Association (FMA) members must show that they promote the wider application of the code within museums.

The Code of Ethics for Museums applies to individuals and institutions. The code is intended to underpin museum policies and to guide members of museum governing bodies. The Museums Association expects its institutional members to uphold the Code of Ethics for Museums and encourages them formally to adopt it.

The structure of the code and related material

The spirit of the code is as important as the letter. The Code is informed by a belief that ethical behaviour is as much about developing good practice as avoiding malpractice. Therefore, the numbered points in each section, which define and detail ethical activity, are expressed in positive, rather than negative terms. The Museums Association's definition of a museum is printed on the front cover of this booklet. The values in the definition are elaborated in a statement of ten core museum values that preface the code. The values serve as a summary of the key points of the code and as headings for sections within it. The italicised sections under each heading in the code describe different

The Code of Ethics for Museums must be subordinate to the legal powers and obligations of governing bodies responsible for museums and the legal powers and obligations of individual members of such bodies. However, the Museums Association believes this Code's provisions to be in the best interests of the public and therefore urges all museum governing bodies (and where appropriate, subsidiary, subcontracted or delegated bodies such as executive committees, contractors or managing bodies), formally to adopt it.

The Code of Ethics for Museums and other voluntary standards

Ethical standards developed by the Museums Association have informed the national Registration scheme for UK museums at an institutional level. Registration is administered by Resource, the Council for Museums, Archives and Libraries.

The Museums Association supports the work of specialist organisations in the UK whose members are involved in museum work and who may produce their own codes of ethics and ethical guidelines. The Museums Association can help in cross-referencing to these codes and guidelines and in referring enquirers to appropriate sources of specialist advice.

The Code of Ethics for Museums is consistent with the Code of Ethics for museums worldwide produced by the International Council of Museums (ICOM). The Museums Association supports ICOM's work.

The Museums Association encourages its members to support international conventions relating to museums whether or not these conventions have been ratified in the United Kingdom, where consistent with this code and the law.

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Glossary

Museum
Users of the Code of Ethics for Museums should be familiar with the Museums Association's definition of a museum:

*'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.'*

In this definition and hence throughout the code, **'museums'** should be taken to include galleries and subsidiary companies of museums.

A **collection** is an organised assemblage of selected material evidence of human activity or the natural environment, accompanied by associated information. As well as objects, scientific specimens or works of art held within a museum building, a collection may include buildings or sites.

Safeguarding includes undertaking conservation, security and collections management.

Making accessible includes undertaking interpretation, education, exhibition, outreach, documentation, research and publication, within or outside the museum's own buildings.

Dealing
Dealing is making a speculative acquisition with the intention of reselling for profit.

Governing body
The governing body of a museum is the principal body of individuals in which rests ultimate responsibility for policy and decisions affecting the governance of the museum. Legal title to the assets of the museum may be vested in this body.

In the case of a museum limited by guarantee the governing body is the board of directors or council of management.

In the case of a local authority museum, it is the full council of the authority. In some local authorities, however, under standing orders,
policy decisions vested in full council are delegated to individual elected members or small groups of elected members. Such delegated powers, where formally agreed, may extend to include decisions on ethically sensitive issues such as disposal.

In the case of a national museum or a museum run by a trust, it is the full board of trustees.

In the case of a museum run by an unincorporated association it is the committee.

In the case of a university museum it is the council (or other-named supreme governing body) of the university.

Public and society
The word 'public' is used in this code in two senses, that inter-connect.

The idea of society having a legitimate interest in museums and their activities is an underpinning value of the code. It is reflected in the use of the word 'public' in terms such as public domain, public service, public trust and public interest.

The word 'public' is also used to characterise those who are **users** of the museum (see below).

(A **registered museum** - see below - must comply with public access criteria prescribed by the Registration scheme).

Registered museum
A registered museum is a museum provisionally or fully registered under the national Registration scheme for UK museums administered by Resource, the Council for Museums, Archives and Libraries.

Users
Users are all those individuals and groups with whom the individual museum is actively engaged, to mutual benefit. That sense of the public served by a museum will be reflected in the individual museum's corporate mission and aims, which should define its target audiences. They may include past, current and potential users of the services provided by the museum.

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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.

Society can expect museums to:

- hold collections in trust on behalf of society

- focus on public service

- encourage people to explore collections for inspiration, learning and enjoyment

- consult and involve communities, users and supporters

- acquire items honestly and responsibly

- safeguard the long-term public interest in the collections

- recognise the interests of people who made, used, owned, collected or gave items in the collections

- support the protection of natural and human environments

- research, share and interpret information related to collections, reflecting diverse views

- review performance to innovate and improve.

HOLD COLLECTIONS IN TRUST ON BEHALF OF SOCIETY

1.0 *Museums behave as ethical guardians as well as owners of collections. They never relinquish the trust invested in them, without public consent.*

All those who work for or govern museums should ensure that they:

1.1 Uphold public trust responsibilities. View the museum as the guardian of its collections.

1.2 Retain items in the public domain at whichever location provides the best balance of care, context and access.

1.3 Avoid behaviour that could be construed as asserting personal ownership or control of collections or any part of them.

1.4 Treat collections as non-negotiable assets in financial affairs. Refuse to mortgage collections or offer them as security for a loan. Sustain the financial viability of the museum irrespective of any valuation placed on items in its collections.

1.5 Fulfil all the museum's guardianship responsibilities in respect not only of the collections but also of all other resources (for example, premises, land and information), which, in explicit or moral terms, it holds in trust for the benefit of the public.

FOCUS ON PUBLIC SERVICE

2.0 *Museums belong to everybody. They exist to serve the public. They should enhance the quality of life of everyone, both today and in the future. They are funded because of their positive social, cultural, educational and economic impact.*

All those who work for or govern museums should ensure that they:

2.1 Recognise the public purpose of museums. Put the public interest before other interests.

2.2 Uphold the highest standards of personal conduct and corporate integrity expected in public service.

2.3 Account for actions and decisions, be willing to justify them and take responsibility for the consequences that flow from them.

2.4 Uphold, promote and abide by the Museums Association's ethical standards both in the letter and the spirit of this Code of Ethics for Museums. Never require or suggest that anyone should act in conflict with the principles of the Code.

2.5 Keep up to date with and work towards achieving other widely accepted standards, such as the Museums Association's Ethical Guidelines, the Registration Scheme for museums in the UK and successor schemes. Respect the ethical codes of others where consistent with this one.

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2.6 Avoid any private activity or pursuit of a personal interest that may conflict or be perceived to conflict with the public interest.

2.7 Declare to the governing body and have recorded by it any activity or pursuit of any interest that may conflict or be perceived to conflict with the public interest.

2.8 Understand legal responsibilities as members of staff or governing bodies and make all policy and practice at the museum comply with the law. Understand that personal liabilities may follow from insolvency or wrongful or fraudulent trading and from breaches of company, charity or trust law.

2.9 Adhere to the museum's constitution, which should establish its purpose and legal status and the role and composition of the governing body. Regard the constitution as a public document. Require each individual member of the museum's governing body to assume equal responsibility for adherence to the museum's constitution, approved procedures and codes of practice. Note that absence from a meeting of the governing body does not necessarily absolve an individual member from any liability for a decision taken at that meeting, should there be any question of breach of trust or statutory default.

2.10 Do not allow the chair or any individual member of a governing body to take on autonomous powers for decisions and actions unless formally delegated to do so and then only on the basis that the actions of the individual are fully and promptly reported back to the governing body, as required by the rules of the governing body.

2.11 Consider the effect of activities conducted in private life on the reputation of the museum and of museums generally.

2.12 Observe recognised public service standards regarding gifts or favours. Refuse to solicit from any person or body, and turn down if offered, any personal gift or favour that might subsequently be interpreted as an inducement to promote or trade with that person or body. Declare any offer of a personal gift or favour and consult at an appropriate level of authority in advance of acting. Record the decision whether or not a gift or favour is accepted. Record gifts or favours accepted by individuals in accordance with well-defined, publicly transparent procedures.

2.13 Refuse to draw on status or position at the museum, or the museum's resources, for personal gain or advancement without prior permission. Have in place policy and procedures so that private work undertaken by employees is approved in advance and does not conflict with the museum's interest or wider public interest. Consider the current needs of the museum in deciding the proportion of any fees that may be retained by employees engaged in private work.

2.14 Refuse to identify, authenticate or value items in private ownership for personal payment, gifts or favours.

2.15 Avoid all activities that could be construed as trading or dealing in cultural property unless authorised in advance by the governing body. Refuse to deal in any material covered by the museum's acquisition policy, to engage in private collecting in competition with the museum or to use a connection with the museum to promote private collecting. Refuse to acquire any items from collections that the museum has disposed of.

2.16 Declare to the museum, and have approved by its governing body, any significant private collecting that may be covered by the museum's acquisition policy. Apply, in any private collecting, the same ethical standards as museums adopt generally, refusing, for example, to acquire illicit material. Collect for private purposes on collecting or field trips only with explicit prior agreement from the museum and if the collecting is incidental and the time involved is reasonable. Make clear to all parties whether an item is being collected for a museum or a private collection.

2.17 Avoid being seen as representing the museum if speaking personally or on behalf of outside organisations whose practices and purposes conflict with that of the museum.

2.18 Recognise that it is legitimate for people who work in museums to present evidence based on their knowledge and experience of subjects that are a matter of public concern or controversy. Obtain authorisation before making statements on sensitive issues that affect the museum. Base any public comments as far as possible on sound scholarship and reliable information.

Society can expect museums to:

ENCOURAGE PEOPLE TO EXPLORE COLLECTIONS FOR INSPIRATION, LEARNING AND ENJOYMENT

3.0 *Museums have the generosity of spirit to be approachable at every point of contact, to reach out to audiences and to increase access to their collections. As educational institutions, museums encourage a participative approach to learning. However specialised their subjects or remote their locations, they develop new audiences and deepen relationships with existing users. Museums recognise that individuals have varied backgrounds and varying physical, intellectual and cultural needs and expectations.*

All those who work for or govern museums should ensure that they:

3.1 Improve the quality of experience for all users.

3.2 Recognise the diversity and complexity of society and uphold the principle of equal opportunities for all.

3.3 Develop and promote the museum to appeal to an ever broader and more varied audience. Aim to provide something of interest to every potential user.

3.4 Promote public awareness, understanding and appreciation of the museum. Promote the educational role of the museum in its widest sense and cater for a broad range of interest levels and abilities.

3.5 Take account of individuals' differing educational experiences, learning styles, abilities and ways of understanding. Provide a choice of types and levels of access.

3.6 Respond to the diverse requirements of different cultural groups.

3.7 Respond to the needs and wishes of people with disabilities. Have in place effective systems to ensure that buildings, displays and other services are increasingly accessible to people with physical, sensory or learning disabilities.

3.8 Take account of present and potential users' ability and willingness to visit if admission or other charges are levied.

3.9 Make provision for those who are not currently prepared or able to visit. Use a variety of means to improve access, such as outreach, publishing or websites.

3.10 Make the museum's services available on a regular basis and at times which reflect the needs of users and potential users. Make opening times, events and other services widely known. Make explicit the levels of access available to collections, including items not on display.

3.11 Respond positively to people's expectations of access to museum collections, whether displayed or not. Regularly review the means available to the museum to make collections more accessible, either directly or in electronic or published form.

3.12 Reconcile the museum's role in safeguarding items for the benefit of future users with its obligation to optimise access for present users. Make explicit the criteria used if access needs to be restricted.

3.13 Make provision not just for safeguarding the collections but also for keeping them accessible whenever a building that houses collections needs to be closed or isolated.

3.14 Assist everyone who makes a reasonable request for information. Give public access to all documentation and other information held by a museum, unless the information was imparted in confidence, or it can be shown that the wider public interest demands that access be restricted (for example to protect collections or prevent abuse of sites of historic or scientific importance).

3.15 Consider restricting access to certain specified items where unrestricted access may cause offence or distress to actual or cultural descendants. Provide separate storage facilities where appropriate. (See also section 7, recognise the interests of people who made, used, owned, collected or gave items in the collections.)

3.16 Facilitate public access to the expertise of members of staff. Allow public access to unpublished research carried out on behalf of the museum unless there is a genuine need to protect the research.

3.17 Undertake identifications to the highest scholarly standards and provide as many significant facts about an item as possible. Do not conceal any lack of specialised knowledge and recommend other appropriate sources of advice to enquirers whenever possible.

3.18 Encourage public appreciation of the cultural rather than financial value of items. Refuse to put a financial value on items for the public. (Valuation for a museum's own internal management processes, such as insurance and acquisition is ethical.) (See also section 5, acquire items honestly and responsibly.)

3.19 Balance provision for particular groups or individuals, such as specialist enquirers, with long-term provision for a wider audience.

*For further guidance see also the Museums Association's **Ethical Guidelines on Access.***

Society can expect museums to:

CONSULT AND INVOLVE COMMUNITIES, USERS AND SUPPORTERS

4.0 ***Museums seek the views of communities, users and supporters and value the contributions they make. Museums actively involve them in developing policy, and balance this with the role of museums in leading and promoting debate. Museums engage with changing needs and values.***

All those who work for or govern museums should ensure that they:

4.1 Consult and involve groups from communities they serve and their representatives to promote a sense of shared ownership in the work of the museum.

4.2 Use advisory and support groups but do not exploit them. Make the status and influence of advisory and support groups clear to their members, treat their views with respect and protect their confidences.

4.3 Work in partnership with others. Involve partners in decision-making. Treat partners with respect. Exercise the authority vested in the museum responsibly and guard against the unwitting or deliberate misuse of power. Remain sensitive to the possibility that the museum, however unintentionally, may act in a way that lacks empathy. Clarify the aspirations of the museum and partner organisations and establish common ground. Draw up clear statements of objectives and working methods for joint projects.

4.4 Keep up to date with social and economic change affecting any specific communities served by the museum. Work collaboratively with other organisations to address social disadvantage and exclusion.

Society can expect museums to:

ACQUIRE ITEMS HONESTLY AND RESPONSIBLY

5.0 *Museums develop collections using long-term plans that are socially responsive. They reject items with dubious provenance. Museums regularly review, publish and adhere to acquisition policies agreed by the governing body that are realistic in terms of the resources required to sustain them. These policies address issues of the context and legitimacy of acquisitions, due diligence, long-term care, documentation and relevance to overriding, institutional aims. Items are acquired on the basis that they will be retained in the public domain.*

All those who work for or govern museums should ensure that they:

5.1 Collect according to detailed, published policies that state clearly what, how and why the museum collects. Frame the acquisition policy in the light of the museum's stated mission. Specify criteria for future acquisitions that include topics, time periods and geographical areas. Collect only within acquisition policies, except in exceptional circumstances.

5.2 Acquire an item only after thorough consideration of its long-term value and how it will be used.

5.3 Accept an item only if the museum can provide adequate, continuing long-term care for the item and public access to it, without compromising standards of care and access relating to the existing collections.

5.4 Examine carefully the implications of, and record the reasons for, accepting items that will not be immediately accessioned into the permanent collection. (Acceptable reasons may include loan, demonstration, handling, testing or retention pending a final decision to accession into the permanent collection.)

5.5 Co-operate rather than compete with other UK museums when collecting. Recognise that other institutions collecting in the same or related fields may have a stronger claim to acquisition of a particular item. Resolve disputes with other museums constructively and in the best interest of the public. Take account of the interests not only of other registered museums but also of related public organisations, such as archives.

5.6 Recognise that individuals or communities may have a stronger claim to certain items than the museum. Take account also of scientific arguments for and against leaving items in their original context. (See also section 7, recognise the interests of people who made, used, owned, collected or gave items in the collections and section 9, research, share and interpret information related to collections, reflecting diverse views.)

5.7 Exercise due diligence when considering an acquisition or inward loan. Verify the ownership of any item being considered for acquisition or inward loan and that the current holder is legitimately able to transfer title or to lend. Apply the same strict criteria to gifts, bequests and loans as to purchases.

5.8 Reject any item if there is any suspicion that it was wrongfully taken during a time of conflict, unless allowed by treaties or other agreements.

5.9 Reject any item if there is any suspicion that it has been stolen unless, in exceptional circumstances, this is to bring it into the public domain, in consultation with the rightful owner.

5.10 Reject items that have been illicitly traded. Note that the UNESCO Convention (on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property) was finalised in 1970. Reject, therefore, any item if there is any suspicion that, since 1970, it may have been stolen, illegally excavated or removed from a monument, site or wreck contrary to local law or otherwise acquired in or exported from its country of origin (including the UK), or any intermediate country, in violation of that country's laws or any national and international treaties, unless the museum is able to obtain permission from authorities with the requisite jurisdiction in the country of origin.

5.11 Reject any item that lacks secure ownership history, unless there is reliable documentation to show that it was exported from its country of origin before 1970, or the museum is acting as an externally approved repository of last resort, or in the best judgement of experts in the field concerned the item is of minor importance and has not been illicitly traded.

5.12 Contact colleagues and appropriate authorities both in the UK and overseas for any information or advice that may be necessary to inform judgement regarding the legitimacy of items considered for acquisition or inward loan.

5.13 Comply not only with treaties which have been ratified by the UK Government, but also uphold the principles of other international treaties intended to curtail the illicit trade, if legally free to do so.

5.14 Report any suspicion of criminal activity to the police. Report any other suspicions of illicit trade to other museums collecting in the same area and to organisations that aim to curtail the illicit trade.

5.15 Avoid appearing to promote or tolerate the sale of any material without adequate ownership history through inappropriate or compromising associations with vendors, dealers or auction houses. Refuse to lend items to any exhibition that is likely to include illicitly traded items.

5.16 Decline to offer expertise on, or otherwise assist the current possessor of any item that may have been illicitly obtained, unless it is to assist law enforcement or to support other organisations in countering illicit activities.

5.17 Exercise caution when accepting conditions attached to acquisitions, particularly those involving gifts and bequests. Discuss expectations and clarify in writing the precise terms on which all parties are accepting transfer of title. Specify unambiguously to donors the museum's intentions regarding such matters as: the long-term retention of items; display; storage and public acknowledgement. (See also section 7, recognise the interests of people who made, used, owned, collected or gave items in the collections and Guidelines for Donors issued by the Museums Association Ethics Committee.)

5.18 Refuse tactfully but firmly to accept an offer of a gift or bequest if items offered do not meet criteria set out in the museum's collecting policy. Explain why the museum is unable to accept an offer of a gift or a bequest.

5.19 Refuse, in writing, any unwanted, unsolicited gifts even if the museum has been advised that they need not be returned. Consider informing intending benefactors, or their representatives, about other registered museums, archives or other public institutions that may be interested in the unwanted items.

5.20 Comply with conditions attached to an acquisition once the acquisition has been made. (See also section 9, recognise the interests of people who made, used, owned, collected or gave items in the collections and the Museums Association's Guidelines for Donors to Museums.)

5.21 Use agreed procedures for taking the final decision to acquire an item. Open procedures for transfer of title to external audit.

5.22 Encourage potential sellers to get an independent valuation when offering items for sale to the museum. Seek the best discount from vendors once they are aware of the likely value on the open market of items they offer to sell to the museum.

5.23 Have in place procedures approved by the governing body for loans from and to the museum, including historic loans.

*For further guidance see also the Museums Association's **Ethical Guidelines on Acquisition; Buying in the Market: A Checklist for Museums; Stealing History: The Illicit Trade in Cultural Material.***

Society can expect museums to:

SAFEGUARD THE LONG-TERM PUBLIC INTEREST IN THE COLLECTIONS

6.0 *Collections are a tangible link between the past, present and future. Museums balance the interests of different generations by safeguarding collections, which may include buildings and sites. Museums develop and implement a collections management policy that ensures appropriate standards of care and security for all items entrusted to them, either permanently or on loan. There is a strong presumption against disposal out of the public domain. Disposal should be undertaken only within the strategic framework of a long-term collections management policy, as a means of returning an item to its rightful owner, or improving care, access or context.*

All those who work for or govern museums should ensure that they:

6.1 Act as guardians of the long-term public interest in the collections.

6.2 Publish, implement and regularly review a forward-looking collections management policy, approved by the governing body, which specifies standards of care. Define, in the collections management policy, levels of care appropriate for different parts of the collection, acceptable levels of risk and how items will be made accessible.

6.3 Protect all items from loss, damage and physical deterioration, wherever they are. Maintain appropriate standards of protection against hazards such as theft, fire, flood, vandalism and deterioration of the collections resulting from adverse environmental conditions. Specify the action to be taken in the event of disasters threatening the museum's buildings, staff, visitors, records or collections. Make every effort to protect the collections in the event of a disaster but never put people's lives at risk.

6.4 Balance the duty of maintaining and enhancing collections for future generations with that of providing appropriate services to today's public. Reconcile security and conservation requirements with users' rights of access and the desirability of lending outside the museum.

6.5 Pay due regard to safeguarding collections and the public's right of access whenever museum premises are used for functions.

6.6 Make provision for safeguarding collections whenever buildings housing them are closed or isolated, whether this is planned or unexpected.

6.7 Make arrangements to care properly for the health and wellbeing of any live animals for which the museum is responsible.

6.8 Demonstrate clearly how the long-term local and general public interest is served in circumstances in which disposal may be appropriate.

6.9 Keep collections as far as possible in the public domain when considering disposal. Maintain public confidence in museums by not selling items from a permanent collection, nor otherwise transferring them, out of the public domain.

6.10 Recognise that formal title and guardianship for the collections is vested in the governing body, which must satisfy itself that decisions to dispose are informed by the highest standards of expertise and take into account all legal and other attendant circumstances. *(Please refer to the definition of governing body in the glossary).*

6.11 Base decisions to dispose on clear, published criteria as part of the institution's collections management policy, approved by the governing body. Carry out any disposal according to unambiguous, generally accepted procedures. Incorporate criteria and procedures for disposal in the museum's collections management policy.

6.12 Give priority to transferring items, preferably by gift, to registered museums. Consider donating items to other public institutions if it is not possible for another museum to accept them. (This paragraph excludes material that is being disposed of because it is damaged beyond use, or dangerous, or is being returned to its place of origin or rightful owner.)

6.13 Refuse to undertake disposal principally for financial reasons (either to raise income or decrease expenditure). Apply any money raised as a result of disposal, if this exceptional circumstance arises, solely and directly for the benefit of the museum's collection.

6.14 Apply any money received in compensation for the loss, damage or destruction of objects in the collection solely and directly for the benefit of the museum's collection.

6.15 Document all disposals and the basis on which decisions to dispose were made.

6.16 Dispose of human remains with sensitivity and respect for the beliefs of communities of origin. (Refer to guidelines on human remains issued by the Museum Ethnographers Group and see also section 7, recognise the interests of people who made, used, owned, collected or gave items in the collections.)

*For further guidance see also the Museums Association's **Ethical Guidelines on Disposal.***

Society can expect museums to:

RECOGNISE THE INTERESTS OF PEOPLE WHO MADE, USED, OWNED, COLLECTED OR GAVE ITEMS IN THE COLLECTIONS

7.0 *Museums try to develop constructive relationships with people who contributed to collections, with representatives of these people, their heirs and cultural descendants, balancing responsibilities to a range of stakeholders. Gifts and bequests of items are usually made in the expectation that items will be preserved. Museums reconcile the wider public interest with that expectation.*

All those who work for or govern museums should ensure that they:

7.1 Acknowledge that the museum benefits from all those who have contributed to the making, meaning and presence in the museum of its collections. Establish working relationships based on mutual understanding, wherever practical.

7.2 Establish principles that assist people who contributed to collections to develop mutually agreed arrangements with the museum, wherever practical. Specify and record these arrangements clearly and unambiguously.

7.3 Articulate clearly intentions and expectations about projects such as commissions, collaborations and workshops. Specify agreements over matters such as funding, copyright, site preparation and maintenance. Make written exhibition policies available to exhibitors. (See also section 4, consult and involve communities, users and supporters.)

7.4 Inform originating communities of the presence of items relevant to them in the museum's collections, wherever practical.

7.5 Respect the interests of originating communities with regard to elements of their cultural heritage present or represented in the museum. Involve originating communities, wherever practical, in decisions about how the museum stores, researches, presents or otherwise uses collections and information about them.

7.6 Consider restricting access to certain specified items, particularly those of ceremonial or religious importance, where unrestricted access may cause offence or distress to actual or cultural descendants. (See also section 3, encourage people to explore collections for inspiration, learning and enjoyment.)

7.7 Deal sensitively and promptly with requests for repatriation both within the UK and from abroad of items in the museum's collection, taking into account: the law; current thinking on the subject; the interests of actual and cultural descendants; the strength of claimants' relationship to the items; their scientific, educational, cultural and historical importance; their future treatment. Refer to Guidelines on Restitution and Repatriation issued by Resource, the Council for Museums, Archives and Libraries and guidelines on human remains issued by the Museum Ethnographers Group. Refer to any subsequent guidance issued by the bodies and their successors listed above. (See also section 6, safeguard the long-term public interest in the collections.)

7.8 Exercise sensitivity and seek professional advice whenever acquiring items from fieldwork. Consider always the desirability of recording and preserving items where they are. Uphold guidelines issued by relevant bodies.

7.9 Exercise sensitivity and seek professional advice whenever reminiscence and oral history work is undertaken. Uphold guidelines issued by relevant bodies.

7.10 Follow up accepted gifts or bequests with a written acknowledgement and confirmation of the terms on which the gift or bequest is being accepted. (See also Guidelines for Donors to Museums, issued by the Museums Association Ethics Committee and section 5, acquire items honestly and responsibly.)

7.11 Uphold and comply with conditions set by benefactors and accepted by the museum, unless changed circumstances mean that conditions need to be reconsidered in the light of what is generally held to be the public interest.

SUPPORT THE PROTECTION OF NATURAL AND HUMAN ENVIRONMENTS

8.0 *Collections in museums represent the rich diversity of the world's natural and human environments. Museums promote learning without jeopardising this diversity. They contribute to sustainable economic activity and benefit local and wider communities.*

All those who work for or govern museums should ensure that they:

8.1 Value and protect natural and human environments. Prevent abuse of places of scientific, historic or cultural importance. Exercise due diligence procedures when acquiring or borrowing items. Uphold appropriate national and international conventions and treaties on protection of natural and human environments, whether or not they have been ratified. (See section 5, acquire items honestly and responsibly.)

8.2 Be sensitive to the impact of the museum and its visitors on natural and human environments. Make best use of resources, use energy and materials responsibly and minimise waste.

8.3 Contribute to the sustainable social and material vitality of the museum's surrounding area by, for example, attracting users, sustaining economic activity, offering satisfying and rewarding employment and pursuing local purchasing policies.

8.4 Develop purchasing and resale policies that address environmental and human rights' issues.

8.5 Make all growth sustainable. Evaluate the long-term impact of introducing, operating and maintaining new developments.

RESEARCH, SHARE AND INTERPRET INFORMATION RELATED TO COLLECTIONS, REFLECTING DIVERSE VIEWS

9.0 *Museums facilitate and carry out research. They share and interpret information consistent with their purpose and ensure that it is accurate, up to date and based on the highest standards of scholarship and research. They organise and manage information to make it accessible. Museums interpret information to engage a wide variety of interests and to reflect diverse views. They invite users to question assumptions and distinguish evidence from speculation.*

All those who work for or govern museums should ensure that they:

9.1 Research and collate information about collections and the subject areas generally within which the museum has expertise. Enable the museum's researchers and others to keep up to date with developments in their field.

9.2 Apply the highest possible standards of objectivity to the research undertaken by the museum, and distinguish clearly between evidence and deduction. Maintain, as far as possible, records and material so that the evidence on which research is based can be re-examined and verified independently.

9.3 Make information publicly accessible. Conduct research with the intention of making it public. Publish research promptly and make it widely available. (See also section 3, encourage people to explore collections for inspiration, learning and enjoyment.)

9.4 Develop mechanisms that encourage people to research collections, develop their own ideas about them and participate in a variety of ways in shaping the interpretations offered by the museum. Make the museum a forum in which ideas can be discussed and tested. (See also section 3, encourage people to explore collections for inspiration, learning and enjoyment.)

9.5 Cultivate a variety of perspectives on the collections to reflect the diversity of the communities served by the museum.

9.6 Represent ideas, personalities, events and communities with sensitivity and respect. Recognise the humanity of all people. Develop procedures that allow people to define, and seek recognition of, their own cultural identity. (See also section 7, recognise the interests of people who made, used, owned, collected or gave items in the collections.)

9.7 Respect the views of others and their right to express those views, unless illegal to do so or inconsistent with the purpose of museums as socially inclusive institutions. Strive to dispel prejudice and indicate clearly the part played by opinion or conjecture in interpretation.

9.8 Reflect differing views striking a balance over time.

9.9 Recognise the assumptions on which interpretation is based and that presentational styles may shape perception in unintended ways. Consider carefully the impact of interpretations that exclude any reference to people associated with the items.

9.10 Strive for editorial integrity and remain alert to the pressure that can be exerted by particular interest groups, including lenders and funders (See also 10.12).

9.11 Keep records and presentations as accurate and as up to date as possible. Record differences of expert opinion. Correct errors in documentation or presentations without delay, when they are brought to light.

Society can expect museums to:

REVIEW PERFORMANCE TO INNOVATE AND IMPROVE

10.0 *Museums develop by initiating and responding to change. They establish, formally adopt, publish and regularly review their aims and objectives. Museums specify targets, monitor, evaluate and report on performance and make changes in operational practices to become more effective and efficient.*

All those who work for or govern museums should ensure that they:

10.1 Adhere to the museum's constitution. Review, periodically, the museum's overarching purpose.

10.2 Keep up to date with developments in the law, museum practice, social policy and public expectations.

10.3 Involve users, staff, members of the governing body and other stakeholders directly in planning. Regularly update and make public the museum's aims, objectives, plans, policies and standards. (See also section 4, consult and involve communities, users and supporters.)

10.4 Make prudent use of resources and maximise the benefit that the public derives from all activities. Account fully and openly to the public about how money is raised and spent.

10.5 Maintain the financial viability of the museum. Meet legal, constitutional and contractual requirements for financial control of the museum (and any subisidiary commercial companies). Avoid unjustifiable financial risk. (See also section 1hold collections in trust on behalf of society.)

10.6 Accept financial support from commercial organisations and other outside sources provided that it does not compromise the integrity of the museum. Clearly define and agree the relationship between the museum and its partners to avoid undue influence on museum activities.

10.7 Establish principles to inform trading and commercial activities so that they are consistent with the aims of the museum and, where possible, enhance the quality of the service. Do not allow trading and commercial activities to bring the museum into disrepute, reduce public access, subject the collections to unacceptable risk or jeopardise finances.

*For further guidance see also the Museums Association's **Ethical Guidelines on Trading and Commercial Activities**.*

10.8 Make the museum's premises as suitable as possible for public services, collections management and access for all, in addition to fulfilling legal responsibilities for the health and safety of staff and visitors.

10.9 Recruit, train and develop individuals so that the skills and knowledge of members of museum staff, the governing body and support groups are appropriate to the needs of the individual and the museum. Facilitate the career-long professional and personal development of all staff and members of the governing body.

10.10 Recognise that all who work for the museum in any capacity have a contribution to make to its successful operation. Recruit and treat all staff fairly. Acknowledge the contributions of colleagues at all levels.

10.11 Undertake and delegate only such duties as are commensurate with individual knowledge and skills. Co-operate fully with any appropriate scrutiny, appraisal or evaluation. Seek and act on advice, whenever necessary, from colleagues in other museums, museum support bodies and consultants. Obtain, when necessary, specialist expertise through contracts or consultancies. (See also section 4, consult and involve communities, users and supporters.)

10.12 Assist the governing body in making informed decisions and obtaining direct access to the advice it needs to fulfil its role.

10.13 Strive to increase the diversity of staff and members of the governing body so that they adequately represent the museum's present and potential audience.

10.14 Conduct disputes with others with courtesy and tolerance, even when differences of opinion are robustly expressed. Avoid giving needless personal offence. Seek independent arbitration, mediation or other means of resolution when disputes cannot otherwise be resolved.

10.5 Maintain the financial viability of the museum. Meet legal, constitutional and contractual requirements for financial control of the museum (and any subisidiary commercial companies). Avoid unjustifiable financial risk. (See also section 1hold collections in trust on behalf of society.)

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How to use this index
The first number in a reference is to a section, the second to a point within it. 1.2 refers, therefore, to section 1, point 2: Retain items in the public domain at whichever location provides the best balance of care, context and access.

If, for example, you are developing an access policy, or dealing with an ethical dilemma around an access issue, then section 3, encourage people to explore collections for inspiration, learning and enjoyment, is clearly the most important section. Access issues are also referred to in other sections, reference to which can be found by looking up the word 'access' in the index.

THE SEVEN PRINCIPLES OF PUBLIC LIFE

The Museums Association endorses the seven principles of public life, as set out in Standards in Public Life: the First Report of the Committee on Standards in Public Life (1995), chaired by Lord Nolan. The principles apply to all who work in or for museums and to all who serve on museum governing bodies.

Selflessness

Holders of public office should take decisions solely in terms of the public interest. They should not do so in order to gain financial or other material benefits for themselves, their families or their friends.

Integrity

Holders of public office should not place themselves under any financial or other obligation to outside individuals or organisations that might influence them in the performance of their official duties.

Objectivity

In carrying out public business, including making public appointments, awarding contracts, or recommending individuals for rewards or benefits, holders of public office should make choices on merit.

Accountability

Holders of public office are accountable for their decisions and actions to the public and must submit themselves to whatever scrutiny is appropriate to their office.

Openness

Holders of public office should be as open as possible about all the decisions and actions that they take. They should give reasons for their decisions and restrict information only when the wider public interest clearly demands.

Honesty

Holders of public office have a duty to declare any private interests relating to their public duties and to take steps to resolve any conflicts arising in a way that protects the public interest.

Leadership

Holders of public office should promote and support these principles by leadership and example.

Information on how to use the principles outlined above to inform the work of governing bodies is available from the Trustee and Governance Team at the National Council For Voluntary Organisations (NCVO), Regents Wharf, 8 All Saints Street, London N1 9RL. www.ncvo-vol.org.uk Help desk tel: 0800 2798 798

Society can expect museums to:

1. HOLD COLLECTIONS IN TRUST ON BEHALF OF SOCIETY

Museums behave as ethical guardians as well as owners of collections. They never relinquish the trust invested in them, without public consent.

2. FOCUS ON PUBLIC SERVICE

Museums belong to everybody. They exist to serve the public. They should enhance the quality of life of everyone, both today and in the future. They are funded because of their positive social, cultural, educational and economic impact.

3. ENCOURAGE PEOPLE TO EXPLORE COLLECTIONS FOR INSPIRATION, LEARNING AND ENJOYMENT

Museums have the generosity of spirit to be approachable at every point of contact, to reach out to audiences and to increase access to their collections. As educational institutions, museums encourage a participative approach to learning. However specialised their subjects or remote their locations, they develop new audiences and deepen relationships with existing users. Museums recognise that individuals have varied backgrounds and varying physical, intellectual and cultural needs and expectations.

4. CONSULT AND INVOLVE COMMUNITIES, USERS AND SUPPORTERS

Museums seek the views of communities, users and supporters and value the contributions they make. Museums actively involve them in developing policy, and balance this with the role of museums in leading and promoting debate. Museums engage with changing needs and values.

5. ACQUIRE ITEMS HONESTLY AND RESPONSIBLY

Museums develop collections using long-term plans that are socially responsive. They reject items with dubious provenance. Museums regularly review, publish and adhere to acquisition policies agreed by the governing body that are realistic in terms of the resources required to sustain them. These policies address issues of the context and legitimacy of acquisitions, due diligence, long-term care, documentation and relevance to overriding, institutional aims. Items are acquired on the basis that they will be retained in the public domain.

6. SAFEGUARD THE LONG-TERM PUBLIC INTEREST IN THE COLLECTIONS

Collections are a tangible link between the past, present and future. Museums balance the interests of different generations by safeguarding collections, which may include buildings and sites. Museums develop and implement a collections management policy that ensures appropriate standards of care and security for all items entrusted to them, either permanently or on loan. There is a strong presumption against disposal out of the public domain. Disposal should be undertaken only within the strategic framework of a long-term collections management policy, as a means of returning an item to its rightful owner, or improving care, access or context.

7. RECOGNISE THE INTERESTS OF PEOPLE WHO MADE, USED, OWNED, COLLECTED OR GAVE ITEMS IN THE COLLECTIONS

Museums try to develop constructive relationships with people who contributed to collections, with representatives of these people, their heirs and cultural descendants, balancing responsibilities to a range of stakeholders. Gifts and bequests of items are usually made in the expectation that items will be preserved. Museums reconcile the wider public interest with that expectation.

8. SUPPORT THE PROTECTION OF NATURAL AND HUMAN ENVIRONMENTS

Collections in museums represent the rich diversity of the world's natural and human environments. Museums promote learning without jeopardising this diversity. They contribute to sustainable economic activity and benefit local and wider communities.

9. RESEARCH, SHARE AND INTERPRET INFORMATION RELATED TO COLLECTIONS, REFLECTING DIVERSE VIEWS

Museums facilitate and carry out research. They share and interpret information consistent with their purpose and ensure that it is accurate, up to date and based on the highest standards of scholarship and research. They organise and manage information to make it accessible. Museums interpret information to engage a wide variety of interests and to reflect diverse views. They invite users to question assumptions and distinguish evidence from speculation.

10. REVIEW PERFORMANCE TO INNOVATE AND IMPROVE

Museums develop by initiating and responding to change. They establish, formally adopt, publish and regularly review their aims and objectives. Museums specify targets, monitor, evaluate and report on performance and make changes in operational practices to become more effective and efficient.

museumsassociation

P.I. Number	BV 170a
PI TITLE	Visits To and Use Of Museums *and Galleries*: all visits
DEFINITION	'Visits/uses' means:
	Visits by a member of the public;
	Enquiries by email, post or telephone for research purposes (not including enquiries about opening hours, tickets, how to get there, or media enquiries, briefings and interviews);
	Website hits for research. All website visits are considered 'research' ones for the purposes of the indicator. If a website user goes to a site and opens several pages or makes several inquiries in the same visit, that should still be counted as one visit;
	Presentations by museum staff to specific audiences (do not count general events and audiences such as exhibition stands or county shows).
	Exclude 'opportunistic' audiences, i.e. ones where there is no specific gathering for the purpose of viewing museum or gallery exhibits or for presentations by museum staff.
	'Museums' includes only museums that met the Museum Association definition (1998) and where the museum is run by the Authority or the Authority contributes at least 20% of the running costs net of charges or provides the building.
	'Galleries' in this context are venues that are used predominantly for the permanent exhibition of historic arts collections, rather than for contemporary arts performances and exhibitions.
	Where an authority provides the building for the museum free, or at nominal cost, or contributes 20% or more to a museum's running costs, then 100% of visitor numbers should be included here.
	An Authority may contribute a collection free of charge to another body's museum. That contribution will not count towards the 20% contribution floor for inclusion in this BVPI, unless it involves the donating Authority in associated revenue expenditure in the year equivalent to the 20% minimum
	Visits/uses per 1,000 population: use the latest ONS mid-year estimates to calculate the local population.
NEWSLETTER UPDATES	
COUNCIL	

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METHODOLOGY	
DESCRIPTION OF PROCESS	Collection of Visitor/Usage Data at Heritage Services Sites. Heritage Services run and oversee six sites, which are open to the public on various schedules. Namely: • Broad Street Museum & Art Gallery, Hereford • Old House Museum, Hereford • Market House Heritage Centre, Ross-on-Wye • Museum Resource and Learning Centre, Friar Street, Hereford • Ledbury Heritage Centre • Museum on the Move We also count 20% of visitors to Kington Museum and Weobley as they pay only a peppercorn rent to the Council for their premises. The way of collecting data varies between sites as described below: • Broad Street Museum and Art Gallery • Old House • Market House Heritage Centre, Ross-on-Wye • Museum on the Move • And the Museum Resource and Learning Centre All these sites have members of staff working at them who are employed by the Heritage Services. Visitors are counted by the Museum Assistant on duty and recorded either by means of a "clicker" or five-bar-gates. This information is transferred on a daily basis onto a weekly summary sheet. The sheets are totalled at the end of each week. At the end of the month the weekly sheets are totalled and the figures are transferred on to a monthly Performance Data sheet and returned to me. The weekly sheets are kept at the individual sites. Enquiries are recorded by members of staff by means of a form which records the name and contact details of the enquirer, the nature of the enquiry, the method received and the time taken to deal with it. These forms are returned to me on a monthly basis and I cross check them for duplications. Only enquiries by phone, e-mail or correspondence are counted. **Ledbury Heritage Centre** Heritage Services have no members of staff working at this site. The Visitor Services Officer visits regularly and

	collates information from volunteer records. The TIC has a shop sale point at the centre and processes some of the visitor data for Heritage Services in return. Ledbury is manned entirely by volunteers. Ledbury doesn't make records of enquiries as we do not direct phone calls or mail to the site and it is not networked. **Heritage Services Website** Numbers of Web-site hits are provided to me via stats sheets from the Council's IT section, these sheets are held by me. A visitor to the site has to have visited a number of pages to be counted as a user. **Pupil Numbers** According to the regulations concerning pupils visiting the sites in organised groups, the school must have called to book their visit before their arrival. A member of staff may record a school party visiting the site, but if the group has not prearranged their visit it cannot be used for performance data. The schools visits diary of bookings is maintained by the learning team and the final figures for this category are passed to me by the team at the end of each month.
CALCULATION	**Calculation of BV170a** This figure is calculated as follows: Number of visits in person + (all sites) Number of Enquiries by telephone, letter and e-mail + (5 manned sites) Hits on the Heritage Services Website + Number of students serviced by our Outreach service + (the majority of our schools work is done in the schools as a visit by an educator to the school and these bookings are handled and recorded by the learning team) Number of professional outreach uses + (This is when a member of Heritage Services staff offers their expertise and professional knowledge to another museum or speaks to a group or organisation in a formal situation about a professional topic or the work of the service) = Total number of usages Divided by 1,000 population of 176.471 (awaiting confirmation of this figure for 2006/7)
SOURCE DATA	Monthly performance sheets, enquiries forms and website hits.
DOCUMENTATION TO BE KEPT	
COMMENTS	Bromyard Heritage Centre has closed. Ledbury Heritage

	Centre's visitor figures make a huge difference to our performance. Ledbury is run entirely by volunteers and we are facing something of a crisis with them as they are aging and we have no new recruits. Opening hours will be compromised next year. If Ledbury opening is compromised next year by volunteer availability we will be expecting the figure given in brackets (Ledbury is open for 7 months and receives over 30,000 in that time.) Last year's figures dropped over 8,000 due to erratic opening. As we have not met our targets for the last two years I do not expect us to meet the targets for this year. The shortfall between this year's target and last year's result is 22. The targets are particularly high as they expect the equivalent of 80% of the population to use our services. This is a high proportion as only 60% of the population of the UK are regular museum users.
RESULT	

TARGETS		
2006/2007	**2007/2008**	**2008/2009**
800	810	815

	NAME	SIGNATURE	DATE
MANAGEMENT OWNER	Natalia Silver		
PERFORMANCE COORDINATOR	Andrew Hasler		
ADMINISTRATOR	Lara Latcham		
DATE METHODOLOGY AGREED WITH DISTRICT AUDIT (IF REQUIRED)			

P.I. Number	BV 170b
PI TITLE	Visits to and Use of Museums *and Galleries*: visits in person
DEFINITION	'Visits in person' includes children in school parties (who are counted individually), but excludes media briefings and interviews.
	'Museums' includes only those museums that met the Museum Association definition (1998) and where the museum is run by the Authority or the Authority contributes at least 20% of the running costs net of charges or provides the building.
	'Galleries' in this context are venues that are used predominantly for the permanent exhibition of historic arts collections, rather than for contemporary arts performances and exhibitions.
	Where an authority provides the building for the museum free, or at nominal cost, or contributes 20% or more to a museum's running costs, then 100% of visitor numbers should be included here.
	An Authority may contribute a collection free of charge to another body's museum. That contribution will not count towards the 20% contribution floor for inclusion in this BVPI, unless it involves the donating Authority in associated revenue expenditure in the year equivalent to the 20% minimum
	Visits/uses per 1,000 population: use the latest ONS mid-year estimates to calculate the local population.
NEWSLETTER UPDATES	
COUNCIL METHODOLOGY	
DESCRIPTION OF PROCESS	Collection of Visitor/Usage Data at Heritage Services Sites.
	Heritage Services run and oversee six sites, which are open to the public on various schedules. Namely:
	• Broad Street Museum & Art Gallery, Hereford • Old House Museum, Hereford • Market House Heritage Centre, Ross-on-Wye • Museum Resource and Learning Centre, Friar Street, Hereford • Ledbury Heritage Centre

	• Museum on the Move
	We also count 20% of visitors to Kington Museum and Weobley as they pay only a peppercorn rent to the Council for their premesis.
	The way of collecting data varies between sites as described below:
	• Broad Street Museum and Art Gallery • Old House • Market House Heritage Centre, Ross-on-Wye • Bromyard Heritage Centre • Museum on the Move • And the Museum Resource and Learning Centre
	All these sites have members of staff working at them who are employed by the Heritage Services.
	Visitors are counted by the Museum Assistant on duty and recorded either by means of a "clicker" or five-bar-gates. This information is transferred on a daily basis onto a weekly summary sheet. The sheets are totalled at the end of each week. At the end of the month the weekly sheets are totalled and the figures are transferred on to a monthly Performance Data sheet and returned to me. The weekly sheets are kept at the individual sites.
	Enquiries are recorded by members of staff by means of a form which records the name and contact details of the enquirer, the nature of the enquiry, the method received and the time taken to deal with it. These forms are returned to me on a monthly basis and I cross check them for duplications. Only enquiries by phone, e-mail or correspondence are counted.
	Ledbury Heritage Centre Heritage Services have no members of staff working at this site. The Visitor Services Officer visits regularly and collates information from volunteer records. The TIC has a shop sale point at the centre and processes some of the visitor data for Heritage Services in return.
	Ledbury is manned entirely by volunteers.
	Neither site makes records of enquiries as we do not direct phone calls or mail to the sites and they are not networked.
	Pupil Numbers According to the regulations concerning pupils visiting the

	sites in organised groups, the school must have called to book their visit before their arrival. A member of staff may record a school party visiting the site, but if the group has not prearranged their visit it cannot be used for performance data. The schools visits diary of bookings is maintained by the education team and the final figures for this category are passed to me by the team at the end of each month.
CALCULATION	**Calculation of BV170b** This figure is calculated as follows: Number of visits in person (all sites) Divided by 1,000 population figure (as above)
SOURCE DATA	
DOCUMENTATION TO BE KEPT	Monthly performance sheets.
COMMENTS	Bromyard Heritage Centre has closed. Ledbury Heritage Centre's visitor figures make a huge difference to our performance. Ledbury is run entirely by volunteers and we are facing something of a crisis with them as they are aging and we have no new recruits. Opening hours will be compromised next year. If Ledbury opening is compromised next year by volunteer availability we will be expecting the figure given in brackets (Ledbury is open for 7 months and receives over 30,000 in that time.) Last year's figures dropped over 8,000 due to erratic opening. As we have not met our targets for the last two years I do not expect us to meet the targets for this year. The shortfall between this year's target and last year's result is 67. The targets are particularly high as they expect the equivalent of 80% of the population to visit our sites. This is a high proportion as only 60% of the population of the UK are regular museum visitors.
RESULT	

TARGETS		
2006/2007	**2007/2008**	**2008/2009**
760	770	780

	NAME	SIGNATURE	DATE
MANAGEMENT OWNER	Natalia Silver		
PERFORMANCE COORDINATOR	Andrew Hasler		
ADMINISTRATOR	Lara Latcham		

P.I. Number	BV 170c
PI TITLE	Visits to and Use of Museums _and Galleries_: school groups
DEFINITION	'Pupils in organised school groups' includes those by secondary school sixth form classes and nursery school classes but not those by sixth form colleges or adult education institutions or play groups. Visits to schools to make a specific presentation to a school group can be included. However, loaning or delivering an exhibit to a school is excluded. 'Museums' includes only those museums that met the Museum Association definition (1998) and where the museum is run by the Authority or the Authority contributes at least 20% of the running costs net of charges or provides the building. 'Galleries' in this context are venues that are used predominantly for the permanent exhibition of historic arts collections, rather than for contemporary arts performances and exhibitions. Where an authority provides the building for the museum free, or at nominal cost, or contributes 20% or more to a museum's running costs, then 100% of visitor numbers should be included here. An Authority may contribute a collection free of charge to another body's museum. That contribution will not count towards the 20% contribution floor for inclusion in this BVPI, unless it involves the donating Authority in associated revenue expenditure in the year equivalent to the 20% minimum.
NEWSLETTER UPDATES	
COUNCIL METHODOLOGY	
DESCRIPTION OF PROCESS	**Pupil Numbers** According to the regulations concerning pupils visiting the sites in organised groups, the school must have called to book their visit before their arrival. A member of staff may record a school party visiting the site, but if the group has not prearranged their visit it cannot be used for performance data. The schools visits diary of bookings is maintained by the education team and the final figures for this category are passed to me by the team at the end of each month.

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CALCULATION	**Calculation of BV170c** The figure is supplied by the education team from bookings made at the sites offering educational/school visits. These are Broad Street Museum, MOM, Old House and Market House Heritage Centre, Ross-on-Wye and Bromyard Heritage Centre. All bookings go through the education team at Broad Street and are reported by the team's administrator.
SOURCE DATA	
DOCUMENTATION TO BE KEPT	Monthly performance sheets.
COMMENTS	The definition of this BPVI seems to have changed and the reporting on this for the first 4 months of this year is therefore incorrect. This figure did not previously include our educators going into schools. If it is therefore permissible to count this we should be able to meet the target. However, setting the target over 7,000 for subsequent years is difficult, as this will then exceed the number of primary aged students in the county and will require repeat visits in any given 12 month period.
RESULT	

TARGETS		
2006/2007	**2007/2008**	**2008/2009**
6,250	7,000	7,100

	NAME	SIGNATURE	DATE
MANAGEMENT OWNER	Natalia Silver		
PERFORMANCE COORDINATOR	Andrew Hasler		
ADMINISTRATOR	Lara Latcham		
DATE METHODOLOGY AGREED WITH DISTRICT AUDIT (IF REQUIRED)			

Accreditation in the West Midlands

All you need to know about the Scheme

The Museums Accreditation Scheme is upon us. In our effort to keep you up to date with all the relevant information we have produced this fact sheet to introduce the new Scheme and present the plan for the West Midlands. The information in this paper has been kept brief so for more information you must refer to the Accreditation Guidelines.

What is the Accreditation Scheme?

Introduced in 1988 in the United Kingdom, as the Registration Scheme for Museums and Galleries, Accreditation is a **minimum standards scheme** that measures museum performance against **minimum** accepted professional standards. It provides an assurance of quality and public accountability, because it addresses a number of fundamental questions which the public and funding authorities are increasingly asking museums. Embraced by the whole sector because of its inclusive character, it has helped more than 1860 museums in the country to improve their standards in collection management and visitor care, reduce their documentation backlogs and attract funding.

Accreditation is a voluntary scheme, grown from an internal demand by museums, and has been developed after a major consultation process with the whole heritage sector. The importance of the scheme lies in the fact that it is a **minimum standards scheme equally applicable to all museums** irrespective of size or status. Accreditation is not concerned with the scale of operations but whether the systems and services in place are appropriate to each individual museum.

Accreditation provides a **recognized national minimum standard** for museums enabling them to demonstrate whatever their size or nature a shared ethical basis and a common framework of operation. In the West Midlands there are more than 140 Registered museums, ranging from National and large Local Authority museum services to small independent museums run entirely by volunteers.

To reflect the progress in the museum sector and ensure that the standard remains relevant to the expectations of the public the Scheme was reviewed and revised. In 2004 the Accreditation Standard was launched. The scheme was renamed to Accreditation to better reflect the purpose and the value of the Standard, and the achievement of the museums that become Accredited.

Why should our museum apply for Accreditation?

The standard has been developed by the whole museum community and has been endorsed by a wide range of organisations involved in the preservation of cultural heritage such as the Department of Culture, Media and Sports (DCMS), the Heritage Lottery Fund (HLF), Local Authorities etc.

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Accreditation has been used as a powerful political tool for museums to argue for their funding when they are faced with financial cut backs. It provides more funding opportunities as many Funding Bodies consider only applications from Accredited Museums. Some of those are the: MLA West Midlands Museum Development Fund, MLA Prism Fund, MLA/V&A Purchase Grant Fund, Gulbenkian Prize. Also, HLF considers Accreditation as a factor in its assessment of applications from museums.

Accreditation has helped museums raise their standards of work and profile within the museum community; because accredited museums are able to demonstrate to their stakeholders, potential donors or project partners that they are committed in achieving and maintaining recognised professional standards in all aspects of their operations. It has enabled museums to benchmark their performance and plan for further development of their service.

These are the top ten benefits of the Museums Accreditation Scheme identified by museums in a survey conducted by MLA in 2002:
- Demonstrates the museum's commitment to achieving and maintaining a professional standard;
- Encourages museums to maintain a basic standard and work towards a higher standard;
- Identifies aspects of the museum's organisation and activities requiring further attention;
- Provides a useful framework when creating policies and undertaking planning;
- Provides an ethical basis for the museum's activities in relation to acquisition and disposal;
- Demonstrates both within the museum sector and to external organizations that the museum meets recognized UK-wide standards;
- Demonstrates the museum's standard to national and local government;
- Provides eligibility for grant aid, and attracts other external grants;
- Demonstrates that the museum is a fit recipient for potential sponsorship and donations;
- Gives access to advice from museum organizations and from curatorial advisors.

What does Accreditation cover?

Accreditation sets out foundation level standards for museums across four key areas: Governance and Museum Management, User Services, Visitor Facilities and Collection Management.

New and developed requirements have been included in the new Standard. This is a brief summary of those:

Governance and Museum Management
- submit a copy of their **forward plan**. It must include the museum's mission statement, key aims, specific objectives and a spending plan. The forward plan should be appropriate to the size and services of each museum and can include anything from producing a leaflet, re-displaying one case to building extra storage facilities.
- have an **emergency plan**, which is available to show to the assessing organisation on request. The plan should be reviewed at least every five years.
- have formal procedures for staff managements and development -(the term 'staff' refers both to paid and voluntary members).

User Services
- have **published information** about their location, opening arrangements and services.

- have services and facilities that are **accessible by a wide range of users**.
- **consult** with users on a regular basis
- **interpret collections** in more than one method for the users' benefit

Visitor Facilities
- provide a range of **accessible public facilities**, or have information about their nearest location
- have **internal and external signage and orientation**, when possible
- have proper arrangements for **customer care**
- have in place arrangements for **maintaining areas used by visitors**

Collections management
- have a written **documentation procedural manual** to guide staff how collections are documented.
- have a **documentation plan** to address backlogs in documentation.
- get expert advice on security arrangements and implement the recommendations.

For more in depth information please refer to the Accreditation Guidelines.

How can our museum apply for accreditation?

Timetable for invitations

The Scheme will roll out over the next five years (2005-9) until all museums already Registered under Phase II have re-applied for Accreditation. Museums will be invited to re-apply according to a county by county timetable which has been approved by MLA. Museums will be formally informed by letter. The first museums to be invited are the Hub partners and museums with Designated collections. All museums will have a six month period to prepare and submit their application from receipt of their invitation letter.

Museums wishing to apply for the first time should first contact MLA West Midlands to discuss in further detail how to make an application.

The application process

Applicant museums are required to complete an application form which will be received by MLA West Midlands, the assessing organisation, demonstrating to what extent the museum meets the requirements for the Accreditation Standard. In addition, museums are asked to submit additional documents to support their application. To guide you as to which documents are required, we have produced a fact-sheet which lists the documents of supporting evidence.

For the first time applicant museums have the ability to submit an electronic form. An exclusive password to each museum will be issued by MLA which will provide access to the on-line form. This method is designed to be in line with government's expectations of an e-society, and also to meet the changing expectations and needs of applicants and assessing organisations. The online application form is very easy to complete and has many user friendly features. Some of those are:
- you are able to save it and work on in it whenever you have time,
- the form is saved online and not on your computer system so you can access it from any computer terminal (such as work, library, home),
- because it is store on an online server even if your system crashes down you will not loose your hard work, you are able to make as many alterations you want before you submit it,
- it does not allow you to submit it unless all the mandatory field are filled thus you will not forget to include important information,
- it prompts you to attach documents.

Full training on the online application form will be given. If you are concerned how this will affect your organisations ability to apply for Accreditation please contact us

Assessing the applications
MLA is responsible for administering the scheme on behalf of the museum community. MLA West Midlands is the assessing organisation for museums in the West Midlands. All applications will be returned to MLA West Midlands where they will be assessed according to the information supplied. If clarification is needed then museums may be contacted directly. Also, MLA West Midlands is required to visit all new applicants in the scheme and at least 10% of museums applying within each period.

Based upon the information provided in the application form and any assessment visits, MLA West Midlands makes a recommendation on the status to be awarded by MLA and the Accreditation Committee. The recommendation is presented at a panel meeting (comprised of members of the Accreditation Committee). The Accreditation panel, depending on the evidence that has been submitted has the final decision as to whether a museum attains:
o   Full Accreditation –the museum satisfies all the criteria
o   Provisional Accreditation – the museum is unable to meet all the criteria immediately but has demonstrated willingness to work towards achieving what is required within one year.

Museums are formally advised of their awarded status by MLA West Midlands.

Retaining Accredited Status
After a museum has been awarded Accredited status it needs to show evidence that it continues to meet the standard. [………………]

Until 2004 Registered museums had to submit an Annual Return form, but from 2005 a bi-annual Information Return will be operated for all museums. Thus, phase II Registered museums will need to submit their first bi-annual Information Return in 2006 and museums that will apply for Accreditation in 2005/2006 will need to complete an Information Return in 2007/2008.

What sources of information, support and advice are available?
[………………]

If you require pre-application support and advice please contact,
Katerina Kremmida, Accreditation Advisor at:
katerina.kremmida@mlawestmidlnds.org.uk
Tel: 0121 631 5804 or 0121 303 3969

If you are a new museum and would like to apply for Accreditation or you wish to discuss the assessment process please contact,
Paula Brikci, Standards & Stewardship Officer at
paula.brikci@mlawestmidlands.org.uk
Tel: 0121 631 5814

The Accreditation Standard is available from:
http://www.mla.gov.uk/action/accreditation/00accreditation.asp

READING MUSEUM SERVICE

CORPORATE MEMBERSHIP SCHEME

MEMBERSHIP & BENEFITS

The two main aims of the scheme are to integrate the Museum Service, its galleries and collections, into the commercial life of Reading and to subsidise the running of the schools loans service. All the income we receive from our Members helps to support this service which takes real objects from the collection out to classrooms throughout Berkshire and beyond. The Loans Service is an important community resource which is recognised nationally for its excellence. It provides unique learning resources for children throughout the region.

Membership is £1,000 p.a. from the date of joining. The benefits to Members are as follows:-

- A Flying Object or a Flying Painting delivered to your premises. The objects are currently changed after 6 months, the paintings after 12 months. An extra display unit/painting can be hired at the additional cost of £250 p.a. each.
- One free hire p.a. of the John Madejski Art Gallery.
- A 20% discount on the hire of any other gallery in the Museum, once p.a.
- Invitations to the members' networking lunches in the John Madejski Art Gallery
- Invitations for you and your staff to Museum and Arts & Theatres events, plus concessionary rates for children's holiday activities
- One free talk about the Museum and its work given to your staff
- Acknowledgement of Corporate Members in our publicity for one exhibition p.a. and special members' rates for sponsoring any other exhibition
- "Adopt a Box". Members can select (free of charge) two boxes to be repackaged as part of the School Loans development project. These will carry the member's branding and the Museum will provide updates on their use in schools around the region
- The names of the Corporate Members are displayed on the Museum's website

For further details please see the Corporate Members' section of the Museum website – www.readingmuseum.org.uk

ANNUAL REPORT ON RURAL REGENERATION

Report By: CABINET MEMBER FOR RURAL
REGENERATION AND STRATEGY

Wards Affected

Countywide

Purpose

1.   To advise Members of the annual activity in Rural Regeneration within Herefordshire.

Financial Implications

2.   None

Background

Market Towns Initiative (MTI)

3.   **Ross-On-Wye**
      MTI programme now commencing year 2. The focus has been on planning a live-work development coupled with a service/networking hub in partnership with Marches Housing Association. The project aims to support a viable live-work business cluster and help to revitalise the local economy. A feasibility study has been completed and gives a 'green light' to the project and a phase II development brief is the next planned stage (a confirmed site is yet to be designated). Other projects include, Shop Front Enhancement Scheme, Community Pride, Ross Live! (Arts project – filling the Ross Festival void), and Herefordshire Business and Technology Show business planning.

      A working group has been set up to look at how to sustain regeneration post-MTI this may lead to the formation of a development trust or similar organisation if the need is identified. The partnership is also keen to work with retailers to create synergies between them – an initial meeting has taken place.

      Ross Town Council is embarking upon developing a Parish plan. Two public meetings have been held and a steering group will be formed to drive the process with assistance from HC and HALC.

4.   **Ledbury**
      Key tasks include liaising with Ledbury and Area Development Trust and continuing to assist with local initiatives where appropriate. A new role is being developed for Market Towns Officer which will sharpen the focus of work in Ledbury and Ross-on-Wye. This will take the form of a more economic development focus and creating key points of contact between the Ledbury community and the local authority.

5.   **Kington**
      The Kington Area Market Towns Initiative programme ceased in March 2006 with the final project in the programme, the Place de Marines glass canopy, due to complete in December 2006.

Further information on the subject of this report is available from
Natalia Silver, Head of Economic and Community Services on 01432 260732

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The 'Redefining the Market Town' European Objective 2 funded programme continues to 2008 with all funds committed and specific projects for 2007/8 currently being finalised with the lead applicants to ensure they start and complete on schedule.

The Kington Area Partnership continue to consider the various options available to them for their future role and structure that will enable it to respond to regeneration issues in the area, and to properly represent the community.

6. **Bromyard**
The Bromyard Market Towns Initiative has now been completed (though the Partnership is considering Development Trust status as part of their succession strategy). This year the Initiative funded the creation of a community website (www.Bromyard.info). It was established as a Community Interest Company with the intention to provide website opportunities for all voluntary and community organisations in the Bromyard area. Other examples of projects include:

- Joint funders for the HOPE Centre - a holistic family centre providing day care for children, outreach facilities for social services and numerous training opportunities.
- A young people community transport project has provided a minibus for joint usage between the Queen Elizabeth School, the Bromyard drugs forum, local primary schools, the youth club and HOPE.
- A much requested skate park facility, championed by the youth of Bromyard, was completed with the assistance of MTI funding.
- Working in Partnership with the Council's Highways Department to provide new large brown tourism signs for all routes into Bromyard. 'Welcome to Bromyard' signs have also been funded, along with improved parking directional signage.

7. **Leominster**
The Leominster Market Towns Initiative completed its first year at the end of March 2006. A cumulative total of £86,037 was spent on five projects:

- The Leominster Training Centre - refurbishing the facility and purchasing new ICT equipment to ensure the Learn Direct Facility remained in Leominster.

- Commission to Staffordshire University to carry out independent research to identify the business needs for the Leominster Area. The report provided a business plan for a Business and Innovation Centre to be located on the Leominster Enterprise Park providing 'micro' business units. Negotiations are now taking place with AWM/RRZ regarding the provision of this facility.

- Convert the Leominster Grange Cricket Pavilion into a community café facility. This is to be a Social Enterprise operated by Marshfields, part of Social Services day care provision.

8. **Redundant Building Grant Scheme**
This scheme, funded by AWM through the RRZ and administered by Herefordshire Council, covers the Rural Priority Areas of Herefordshire, Shropshire & Worcestershire and the Zone. Grants are provided for the conversion or refurbishment of redundant buildings to bring them back into productive business use or enhance current business use. £1,129,675 of the £1.3m grant budget has now been committed to 43 projects, 27 of which are in Herefordshire. These projects will generate 352 new jobs and safeguard 94 jobs in the sub region. Two major projects

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Further information on the subject of this report is available from
Natalia Silver, Head of Economic and Community Services on 01432 260732

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recently completed in Herefordshire. In June the Burton Hotel in Kington opened a new health & fitness centre with a pool and leisure facilities for the community and guests. The Bringewood, a country pursuits centre at Burrington willl open its doors on 2nd June, 2006 and will offer clay pigeon shooting, off road activities, outdoor pursuits, hostile environment training and a venue for business conferences, wedding parties, and educational activities. Negotiations have commenced with AWM with regard to additional funding and a further £1.5m has been awarded and will extend the programme to 2011. In recognition of the scheme's success to date, it will also be rolled out to cover the whole of the 3 counties, expanding the eligible area by over 50%.

9. **Shop Front Grants**
    As part of the Market Towns Initiative five Shop Front Grants Schemes were administrated by the Council.

10. The Kington and Bromyard schemes have now been completed, finishing on 31st March, 2006. Bromyard achieved 12 shops supported over the life of the scheme and Kington achieved 11 shops supported over the 12 month scheme. Leominster is now into its second year with eight shops being offered grants. Ross has seen unprecedented numbers of shops applying for the grant, so much so that a further £17,000 has been applied for from AWM. So far, Ross has offered 14 shops grants with 2 applications being agreed in principle but further information required before finalising an offer.

    All the above schemes have been supported through the Market Towns Initiative.

11. **Ross New Trader Support Grant**
    This scheme has been piloted in Ross-on-Wye, where, at the time of the request for support had some 21 shops vacant in the Town Centre. This was a rate relief scheme to give new traders a helping hand in the first few months of their business life. It equates to £750 or three months equivalent business rates, whichever is the lesser.

12. It was launched on 1st October, 2005 and finished on 30th September, 2006. The scheme supported 8 shops in the sum of £3,960.13. The scheme is currently being evaluated and if it shows some demonstrable benefit to Ross then the recommendation will be to roll it out to other Market Towns.

13. **Parish Plans**
    Through the coordination activities of the Parish Liaison Officer, Herefordshire Council has continued to support the development of Parish plans in the County. 10 new Parish planning groups were provided with advice and support last year, with ongoing support for 12 other Parish planning groups. This involved arranging contact with Herefordshire Council officers, coordinating Officer responses to draft Parish plans and promoting the value of Parish plans to service providers within the County. In partnership with Community First, a Parish Plans Surgery event was held at the Town Hall bringing together six Parish planning groups with 10 Herefordshire Council Service areas. In addition, five Parish plans were supported by the allocation of Small Project Fund grants of £1,000 through the Delegated Grants Team. From this year for the next three years, it has been proposed that £12,000 of the Small Project Fund should be ringfenced to support Parish planning groups with grants of up to £1,500 or 75% of their project costs, whichever is the lesser.

Further information on the subject of this report is available from
Natalia Silver, Head of Economic and Community Services on 01432 260732

14. Out of 62 Parishes involved with Parish Planning 35 plans have now been completed. 11 of these have been adopted by Herefordshire Council's Planning Services as Supplementary Planning Guidance.

15. **Livestock Market**

During 2005/6 seven public meetings have taken place primarily to consult residents and other interested parties on the proposed relocation of the Livestock Market. The public meetings have been well attended (approximately 100 at each) and caused lively debate. A record of the meetings is made available via the Internet along with a list of "frequently asked questions". Once a preferred site is agreed, further detailed studies will have to be carried out on traffic, archaeology, and environmental impact to support the planning application.

RECOMMENDATION

THAT the report be noted

BACKGROUND PAPERS

• None Identified

Further information on the subject of this report is available from
Natalia Silver, Head of Economic and Community Services on 01432 260732

PERFORMANCE MONITORING REPORT
Report By: DIRECTOR OF ADULT AND COMMUNITY

Wards Affected

County-wide

Purpose

1.   To report on the available Performance Indicators position and provide information about current performance management work within the Economic and Community Services Division of the Adult and Community Services Directorate.

Financial Implications

2.   No direct implications.

Background

3.   The Performance Management Framework of the Council requires reporting to Scrutiny Committee quarterly. This reporting format has been produced to provide coverage and commentary about a selection of Best Value and Local Performance Indicators. The report also identifies issues, challenges and concerns relating to the performance indicators.

4.   The majority of indicators are annually calculated and therefore do not have quarterly results (these are listed as "annually calculated" shown as AC on the attached information).

5.   Key:

BVPI = Best Value Performance Indicator

LAA = Local Area Agreement

Local PI = These are taken from Directorate and Service plans selected by Service Manager these can include **LPSA** indicators

Out Turn = The previous Year End figures

Target = Figure to be reached or exceed by the end of Year

Quarters
Actual Q1 = 1st April to 30th June
Actual Q2 = 1st July to 30th September
Actual Q3 = 1st October to 31st December
Actual Q4 = 1st January to 31st March

The Figures in the Actual Quarters column can be Percentages, Ratios or actual Numbers, these vary according to the definition of the Indicator.

Status

☺ = The Current Out-Turn Figure is equal to or greater than the Target figure

😐 = The Current Out-Turn Figure is less than the Target figure but an improvement on the previous years Out-Turn

☹ = The current Out-Turn figure is less than the previous years Out-Turn figure

RECOMMENDATIONS

That   (a) the report on Economic and Community Services Performance be noted.

and

(b) areas of concern continue to be monitored.

Appendix One – Social and Economic Regeneration

BVPI	Local PI	Definition	Out-turn 05.06	Target 06.07	Q1	Q2	Q3	Q4	Status
Community Safety									
127a	LPSA2G	Number of violent crimes in Herefordshire (violence against the person, sexual offences and robbery as set out in the crime statistics)	14.7	15.2	3.5	4			☺
	LPSA2G	Number of criminal damage incidents in Herefordshire as recorded by West Mercia Police;	2316	2206	AC				😐
	LPSA2G	To reduce the percentage of people who think that: (a) speeding traffic is a problem (b) vandalism, graffiti and other deliberate damage to property or vehicles is a problem (c) people using drugs is a problem (d) people dealing drugs is a problem (e) people being drunk or rowdy in public places is a problem	a.81% b.60% c.60% d.53% e.53%	a.78.6% b.58.3% c.58.2% d.51.5% e.51.4%	AC				😐
Economic Regeneration									
	LPSA2G LAA HCS	Average (median) weekly earnings in Herefordshire compared with the average in the West Midlands	Hfd £351.10 WM £402.50	Hfd 368.76	AC				😐
	√	% of working age in employment (average over year)	81.0%	81.5%	AC				☺
	LPSA2G LAA	No. employed in technology & knowledge intensive industries	9339	9500	AC				😐
Community Regeneration									
	√	% of respondents finding it easy to access: A – Local Shop; C – Post office; H – shop selling fresh fruit & vegetable; N - cultural / recreational facility	A: 89% C: 84% H: 80% N: 55%	A: 90% C: 58% H: 81% N: 56%	AC				😐

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3

Success Stories

Community Safety
- Alcohol Co-ordinator now in post, induction and initial training completed. Work programme currently being developed by line manager
- Alcohol Referral Scheme has recently been reviewed. Bail conditions are being used more effectively, after custody staff received training and support and now carrying out a trial with a Fixed Penalty Scheme referral for 6 months. Alcohol Co-ordinator is monitoring all referrals and assessing effectiveness of scheme.
- Installation of new camera in Union Street started. Commercial Street BT Fibre Optic links have been replaced. Questionnaire sent to all Heads Of Service to assess where CCTV can assist across the council.
- Meeting in Leominster with a local business rep to look at Anti Social Behaviour issue in Leominster with the local Police Officer.
- Community Development Worker now in post

Economic Regeneration
- Economic Development strategy to be finalised in New Year.
- AWM awarded HC £9.5m of funding towards the implementation of Rotherwas Futures.
- Tenzing and Lancrofts both started on Leominster Enterprise Park. Langcrofts finished first building. Work started on Police Station.

Community Regeneration
Parish Plans analysis almost completed with new Parish Plan Guidance notes to be printed and distributed to Parish Councils in December; new Parish and Community Plan grant scheme launched in October
New style Community Forums piloted in November with high attendance, first actions being agreed and reported; partners such as Police, Herefordshire Council, PCT and HALC are responding in appropriate ways to issues being brought to our attention by communities feedback via next meeting, "Have your say" website; first working group to address issues in South Wye. Communication about Forums via Herefordshire Matters, Parish Councils, local radio.

Issues, Challenges and Concerns

Business Start Up grant has out grown current financial resources, additional resources to be identified

Appendix Two – Parks and Countryside

BVPI	Local PI	Definition	Out-turn 05.06	Target 06.07	Q1	Q2	Q3	Q4	Status
	LAA	% of people who use sports and leisure facilities at least once a month	BVS 04.05 25%	27%	A/C				☺
	LAA	% of people who use parks, open spaces, play areas and other community recreational facilities at least once a month	BVS 04.05 41%	48%	A/C				☺
	√	Usage of Halo facilities			371,806				☺
178		The % of total length of Footpaths and Public Rights of way, which were easy to use by members of the public	52.1%	48%	43.5%		Q3 54.4 % Overall 49%		☺

BVS = Data refers to the Best Value Survey undertaken in 03/04. Due to be updated later this year. It is a 3 yearly survey.

Success Stories

Parks and open spaces
- The survey of PRoW is now complete for 06/07 the next survey is due in May 2007
- Annual ROSPA inspection- all programmed work complete in accordance with inspection results is for 06/07 financial year.
- Bodenham Lake re-profiling work completed. New education facility installed at Queenswood due to be opened in the Spring.
- Contract let for decontamination and infrastructure work at Aylestone Park.

Sports and Leisure facilities
- Capital Development at Kington now completed
- Kingstone Sports Hall now open
- A Management agreement for community use of Whitecross PRI is now compete
- Despite poor Summer attendances at the Halo facilities, attendances are now rising and Income is on target for period 8

Issues, Challenges and Concerns

Sports and Leisure facilities
Ross Capital Scheme - delayed due to flood risk assessment. Scheme now planned to start next summer.
Rises in utility costs - this continues to impact upon income for Halo with some initiatives have been put on ice to ensure budget position sustained.
Usage of Halo facilities - Competition from the private sector and economic downturn are a risks to achievements.

Financial Position

Council's leisure budget on target at Period 8. Halo cash flow on target but trading is much tighter than 05/06.

Appendix Three – Cultural Services

BVPI	Local PI	Definition	Out-turn 05.06	Target 06.07	Q1	Q2	Q3	Q4	Status
	LAA	% of people who use Theatre and Concert Halls at least once every 6 months	BVS 04.05 32%	33%	A/C				☺
	√	Number of visitors to the tourist information centres.	305,932	306,500	90,272				☺
	√	Usage of Courtyard Centre of the Arts			18,552				☺
170a		Number of visits to and usage of museums/heritage centres per 1,000 population	774	790	235	286			☺
170b		Visits To and Use of Museums: visits in person	693	700	219	261			☺
170c		Visits to museums and galleries in organised school groups	3810	6250	1904	1303			☺
	√	Number of library visits per 1,000 population	4690	4750	A/C				☺
	LAA	% of people who use libraries at least once a month	BVS 04.05 32%	32%	A/C				☺
220		Compliance Against the Public Library Service Standards (PLSS)	2	2	A/C				☺
	✓	Numbers taking part in the Sports Referral Programme	76	60	13				☺
	✓	% of existing LIFT Exercise Referral clients completing the programme.	46%	50%					☺

BVS = Data refers to the Best Value Survey undertaken in 03/04. Due to be updated later this year. It is a 3 yearly survey.

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Success Stories

Libraries
- The Kington Centre opened on Monday October 30th with increased opening hours over 6 days.
- First Mobile Library produced, second now due for delivery in December
- INSPIRE Scheme - Successful launch by Michael Mable, local poet. He visited all participating libraries including Herefordshire Clinical Library Service, University of Worcester
- Completed participation in Families Love Libraries scheme
- Families Learners Week - 8 events staged during the Week with 57 adults and 143 children taking part

Arts
- Festival & Events Forum has taken place with 31 attending. 83% stated that the event provided them with valuable information and tips which will help them to organise an event or festival. 87% found the content good or excellent.
- Fourth edition of the Festival & Event listing has been proofed and will go out mid December.
- Village public Arts/Heritage projects - 682 people involved in workshops. Three artworks are now installed in Bosbury, Cradley and Whitchurch, artworks for Dorstone and Ewyas Harold (waiting for planning approval) are not completed yet by the artists.
- Courtyard Centre for the Arts extended use feasibility study – consultancy company to be selected by a panel and appointed by the end of December and work expected to be complete by the end of April 2007.

Healthy Lifestyles
- Referrals to the Sports Referral scheme continue to grow, there has now been an appointment of a second officer to support the case-work. A Funding Event was held launching the DVD made to raise awareness of the project. Funding avenues will now be followed up by the project co-ordinator.
- 18 local people are being trained through OCN in Health & Physical Activity .A second instructor has been advertised to work across South Herefordshire through the SHAPES project – developing more opportunities using local community facilities
- The Walking for Health scheme is now being developed county-wide with a pack of 14 health walks being developed and volunteer walk leaders being trained in December 06
- An exercise referral scheme specifically designed for young people is being developed with potential referrers. The target will be to help raise levels of physical activity in young people by providing brief interventions.
- Phase 3 of the Adopt a School programme is now running in partnership with Halo and the School Sport Partnerships.
- 5 multi-skill clubs are now being established linked to the 'Adopt a School' project and a pilot one at a community sports club facility. These are being facilitated by the newly appointed Community Sports Coaches

Heritage
- Photographic Festival exhibition well attended. Wood Engraver's exhibition selling well, though visitor modest compared to other exhibitions this year.
- School visits to Mobile Museum are good this year, due to the allocation of visits to Herefordshire in term time (the rota is currently on a three year cycle with two other county partners). Usage of educator led sessions is less good at the moment and possibly linked.

Issues, Challenges and Concerns

Significant funding available for Mobile Museum from the Renaissance in the Regions initiative that is subsidising the tours and funding the new exhibition. Availability of educators and cost of school transport to sites remain issues

BVPI	Local PI	Definition	Out-turn 05.06	Target 06.07	Q1	Q2	Q3	Q4	Status
	✓	The number of working days/shifts lost annually to sickness absence per full time equivalent	10.5	9	7.45				😐
	✓	% annual staff turnover	Not available	9%	-				😐

COMMUNITY SERVICES SCRUTINY COMMITTEE WORK PROGRAMME

Report By: Chairman, Community Services Scrutiny Committee

Wards Affected

County-wide

Purpose

1   To consider the Committee work programme for the remainder of 2006/07.

Financial Implications

2   None

Background

3   In accordance with the Scrutiny Improvement Plan a report on the Committee's current Work Programme will be made to each of the scheduled quarterly meetings of this Scrutiny Committee. A copy of the current Work Programme is attached at appendix 1.

4   While the programme was based on the programme agreed by Committee in December 2005, much of which was left open so that current issues could be explored at the time of each meeting. Members are reminded that guidance for developing an effective work programme is contained in the Scrutiny Handbook previously issued to Members.

5   As you will see from the attached appendix final reports from two of the Committee's Review Groups are scheduled to present their final reports. I will call a special meeting of the Committee to consider these reports once they have been completed.

6   Should any urgent, prominent or high profile issue arise, as Chairman I may consider calling an additional meeting to consider that issue.

7   Should Members become aware of any issues they consider may be added to the scrutiny programme they should contact either myself as Chairman or the Vice-Chairman to log the issue so that it may be taken in to consideration when planning future agendas or when revising the work programme.

RECOMMENDATION

> **THAT subject to any comment or issues raised by the Committee the Committee work programme be approved and reported to Strategic Monitoring Committee.**

Further information on the subject of this report is available from
Craig Goodall, Democratic Services Officer, on 01432 260445

WorkProgReport2012061.doc

BACKGROUND PAPERS
- None identified.

Further information on the subject of this report is available from
Craig Goodall, Democratic Services Officer, on 01432 260445

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COMMUNITY SERVICES SCRUTINY COMMITTEE 2006/7

March 2007	
Items	• Review of Items, Issues and Recommendations dealt with by the Committee May 2003- March 2007

Outstanding Items

- Final Report of 18-35 Review Group
- Final Report of Hereford City Partnership Review Group