

REPORT TO: EDUCATIONAL SERVICES COMMITTEE ON 10 AUGUST 2005

**SUBJECT: POLICY FOR SUPPORT TO LOCAL INDEPENDENT MUSEUMS:
ANNUAL PERFORMANCE REVIEW**

BY: DIRECTOR OF EDUCATIONAL SERVICES

1. Reason for Report

- 1.1 To update the Committee on the results of the Performance Measurement for Elgin Museum for the period 1 January to 31 December 2004. Performance measurement has not been included for the Buckie Drifter, which is no longer in operation.
- 1.2 This report is submitted to Committee in terms of Section E (para 22) of the Council's Administrative Scheme relating to the Museums Service.

2. Background

- 2.1 The Elgin Museum receives an annual revenue grant from The Moray Council under the Council's Policy for Support to Local Independent Museums. The reporting period has been set to coincide with their annual accounting period.
- 2.2 The Support Policy includes provision for a set of professional performance measures and performance indicators, with which organisations in receipt of assistance must demonstrate compliance, or a serious attempt to do so. Identical performance measures also apply to the Council's Museums Service. Copies of Summaries of the assessments are attached in **Appendix I**. Copies of the Performance Indicators are available in the Members' Library.
- 2.3 This review has been carried out under the same criteria as in the previous monitoring period. In future it is likely that these will be replaced by the standards being introduced under the new national Accreditation Scheme for Museums.

3. Summary of Assessments

3.1. Elgin Museum

- 3.1.1. The Elgin Museum has continued to maintain high professional standards, and is to be congratulated on achieving a large increase in visitor numbers following the 'People and Place' Lottery-funded project.
- 3.1.2 The continuing improvements in planning, and staff and risk management, are also welcome.

3.1.3 Most of the operational areas, where there is clear scope for future improvement, are in relation to the need to develop policies that underpin the museum's operation and sustainability, and the action plans arising from these.

3.1.3 It is clear, from regular Council contacts both with the Museum Management Committee and also the Moray Society Board, that there is a rich diversity of development potential among the membership, staff and volunteers. While the Lottery project has resulted in a first-class new interpretation in the front gallery of the building, the rear gallery interpretations are now in need of refurbishment. Although limited *ad hoc* work has taken place here within the scope of the limited funding available, the long-term sustainability of this approach is at risk unless supported by robust forward planning mechanisms.

3.1.4 There is however an urgent need for the Society to adopt appropriate forward planning in relation to the museum. This will mean a medium to longer term strategic approach, and should:

- identify areas of strength and weakness, and areas for improvement;
- prioritise these against a timetable;
- identify the resources required;
- locate and draw down the necessary funding; and
- provide a mechanism for regular review and updating

Such an approach will place the Society in a stronger position to focus on an agreed set of targets and the Board of the Moray Society to more effectively monitor developments and resource requirements on an ongoing and informed basis.

3.2 **The Moray Council Museums Service**

3.2.1 The Moray Council underpins the museums and heritage sector within Moray through:

- support – financial and professional - to independent museums and heritage facilities
- delivery of services to the public and corporate users
- providing a strategic lead within the sector

3.2.2 The Moray Council Museums Service continues to deliver services directly from four museums (three of which are Registered). These provide appropriate focus for Museum and Heritage activity in Forres (The Falconer Museum and Nelson Tower); in Tomintoul; and at the Anson Gallery in Buckie. The drop in visitor numbers to these centres during the period was disappointing.

3.2.3 Improvements made within the service have been achieved through implementation of appropriate targets in the Service Plan, and areas identified for improvement are likewise included in the current Service Plan.

3.2.4 Education, which lies at the heart of every museum, remains the area in which the service has achieved its lowest score. Although additional resources are required to maximise potential in this essential core element, the launch of the three-year

Lottery-funded project at the Falconer Museum in April 2005 is expected to bring a short to medium-term improvement in this operational area.

- 3.2.5 There remains also a need to improve aspects of collections management and care, especially with regard to the long-term future usability and preservation of the collections. The Service is already exploring ways to address this issue, which is of common concern to Local Authority museums throughout the North-east.
- 3.2.6 The Moray Museums and Heritage Forum remains the focal point for delivery and support of museums services throughout Moray, across the local authority and independent sectors. This is of particular value in the future in a shared approach to the delivery of heritage services.
- 3.2.7 The Moray Council Museums Service has a key role to play in helping to co-ordinate and enable a range of activities through the Forum and other partnerships. The Museums Service is currently a partner in a three-year project, partly funded by the Scottish Executive Regional Development Challenge Fund, involving the Highlands and Islands Local Authorities. 'Skills Building for the Future' has a remit to achieve growth in sector capacity, with particular regard to the sharing and enhancement of skills and training.

3.3 **Service Overview**

- 3.3.1 The museums under review achieved a combined visitor total of 48,499. The museums responded to a total of 675 enquiries, and met the needs of 1378 school pupils either through visits to the museums or the loan of resources directly to schools. Volunteers contributed a total of 2,202 person-hours to these museums during the year.
- 3.3.2 The funding per head of population on museums in Moray, by the Moray Council, and including financial support to the Elgin Museum, was £2.36.
- 3.3.3 The financial and logistic support given by the Council to the Elgin Museum is essential to allow it to continue to preserve and interpret the heritage of the area it serves.
- 3.3.4 The Policy for Support to Independent Museums is an essential component of the strategic lead taken by the Council in underpinning the sector within Moray. This lead is delivered through regular dialogue with other registered museums in Moray, and is further supported through the Moray Museums and Heritage Forum. The Service continues to face the challenges of meeting strategic objectives set out by the Scottish Executive, with particular emphasis on community planning, ICT, access and learning, as well as meeting the new Accreditation Standard.

4. **Financial Implications**

- 4.1 The financial support given by The Moray Council to Elgin Museum in 2004/05 was £16,200.

- 4.2 The annual revenue budget for the Moray Council Museums Service, net of financing costs but including the financial support to The Elgin Museum referred to above, was £203,933.

5. Staffing Implications

- 5.1 There are no staffing implications.

6. Environmental Implications

- 6.1 There are no environmental implications.

7. Sustainable Development Implications

- 7.1 The Museums Service is committed to ensuring sustainable development through strategic planning and operational practice. It encourages organisations supported by it to similarly adopt sustainable development principles underpinned by a robust strategic approach to forward planning, monitoring and reporting.

8. Consultations

- 8.1 The Senior Management Team of Educational Services has been consulted and agree with the proposals.
- 8.2 The Moray Society has been consulted with reference to the provision of performance measurement data for the Elgin Museum.
- 8.3 Deborah Brands, Principal Accountant, has been consulted and is in agreement with the financial implications contained in the report.

9. Corporate Plan

- 9.1 The Policy of Support and Performance Measurement, which underpins independent museums service provision in Moray, meets the main aims of the Council's Educational Programme.
- 9.2 It also meets the key objectives outlined in the Libraries and Information Service Plan in relation to the strategic role of the Council's Museums Service. This includes ongoing annual performance measurement under the terms of the Support Policy.

10. Recommendations

- 10.1 In respect of the Council's Support to Local Independent Museums during 2004-2005 Committee is recommended to:**
- i. note that independent Registered Museums in Moray continued to maintain high professional standards and provided quality visitor experiences within a continuous improvement framework;**

- ii. note that the Council's Museum's Service continues to underpin the sector in Moray through support, directly delivered services, and strategic leadership;**
- iii. note the importance of accountable forward-planning mechanisms in underpinning service delivery in all museums and that the Moray Society would benefit from adopting a more robust approach to forward planning;**
- iv. note the measures being taken to address current concerns regarding collections care; and the provision of education and lifelong learning capacity within the Museums Service**

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Background Papers:

Ref: DMD/JR/Reports/Ed Com/10 August 2005/Policy for Support to
Local Independent Museums: Annual Performance Review

The Elgin Museum

Operational Service Area	Total Attained	Total Possible	Percentage Compliance 2004/05	Percentage Compliance 2003/04
1 Service - Registration, Best Value, Targets, Performance Measurement and PI's, National Audit*	26	27	96	89
2 Facilities – Museums, Lab and Independents	6	6	100	100
3 Staff – Provision and Training*	12	13	92	85
4 Collections – Policy, Documentation, Catalogue	11	12	92	92
5 Preservation – Collection Care, Conservation*	23	23	100	96
6 Interpretation and Display – Research, Resource development, Refurbishment, Events	16	16	100	100
7 Support Grant	3	3	100	100
8 Forum – Networking, co-operation	5	5	100	100
9 Enquiries**	5	6	83	83
10 External Organisations	5	6	83	83
11 Social Justice and Access Issues - Strategy, shortfalls, pilot projects, implementation, enhancements to displays, special equipment [†]	9	11	81	100
12 Education Service – Schools support, curriculum development, Resource development [†]	9	10	90	100
13 Talks and Lectures – providers and programmes	5	5	100	100
14 Opening hours – monitoring, review	6	6	100	100
15 Marketing – Strategy, Research, Plan, Implementation [†]	7	11	63	73
16 ICT – Strategy, Website, Other ICT resources, email	7	7	100	100
17 Income generation – Sales, Shops, services, searches, enquiries	8	8	100	100

* Increased from previous year

[†]Decreased from previous year

** This service area is at the maximum attainable as one of the criteria is not applicable to this museum

The Museum has made improvements in the past year in respect of the following service areas:

- Service planning
- Staff management
- Collections care, in respect of risk management

The museum has suffered a drop in performance in relation to two service areas, and there is scope for future improvement in the following:

- Policy management
- Staff management, in respect of ethical standards review

- Collections, with regard to written documentation procedure
- Volunteering in respect of written policy
- Access and outreach in terms of policy development and action plan
- Education in terms of policy and action plan
- Marketing in respect of market research, forward planning and implementation

The Moray Council Museums Service

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2 Facilities – Museums, Lab and Independents	6	6	100	100
3 Staff – Provision and Training*	12	13	92	85
4 Collections – Policy, Documentation, Catalogue*	12	12	100	92
5 Preservation – Collection Care, Conservation*	21	23	91	83
6 Interpretation and Display – Research, Resource development, Refurbishment, Events*	14	16	88	81
7 Support Grant	3	3	100	100
8 Forum – Networking, co-operation	5	5	100	100
9 Enquiries	6	6	100	100
10 External Organisations	5	6	83	83
11 Social Justice and Access Issues - Strategy, shortfalls, pilot projects, implementation, enhancements to displays, special equipment	10	11	91	91
12 Education Service – Schools support, curriculum development, Resource development	8	10	80	80
13 Talks and Lectures – providers and programmes	5	5	100	100
14 Opening hours – monitoring, review	6	6	100	100
15 Marketing – Strategy, Research, Plan, Implementation*	11	11	100	91
16 ICT – Strategy, Website, Other ICT resources, email	7	7	100	100
17 Income generation – Sales, Shops, services, searches, enquiries	7	8	87	87

* Increased from previous year

† Decreased from previous year

The Museum has made improvements in the past year in respect of the following service areas:

- Staffing – improved management of training needs
- Preservation and Collections Care – improvements to manuals for documentation and emergency planning,
- Interpretation and display – the introduction of hands-on display materials
- Marketing – re-launch of the service website

Potential for future improvements are deemed to remain in respect of:

- Staff, in relation to the undertaking and publication of research material
- Conservation, in relation to long-term monitoring and collections care by dedicated staff
- Interpretation and Display, with regard to interactive media and an up-to-date approach
- External organisations, in respect of policy-led integration of volunteers
- Outreach and access, in respect of consultation with specialist user groups
- Education service, in respect of dialogue with educators, and integration with the curriculum