

REPORT TO: EDUCATIONAL SERVICES COMMITTEE ON 9 AUGUST

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

BY: DIRECTOR OF EDUCATIONAL SERVICES

1. Reason for Report

- 1.1 To present the results of the Performance Review for Elgin Museum for the period 1 January to 31 December 2005 and to invite the Committee to approve a new Performance Framework for Registered Museums in Moray.
- 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 performance measurement framework that was introduced in 2003. This framework has been helpful in driving forward continuous improvement, but is now at the point where a review is appropriate.
- 2.4 Audit Scotland has implemented new Statutory Performance Indicators (SPIs) for local authority museums, effective from April 2006, and which also cover independent museums that receive support from their local authority.
- 2.5 In addition, the Museums, Libraries and Archives Council is now implementing the phased rollout of the Museums Accreditation Scheme which replaces the legacy Museum Registration scheme. The Moray Council Museums Service will be invited to apply for Accreditation during 2007, and Elgin Museum at any time from the beginning of 2008.

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 further increase in visitor numbers in the past year.

3.1.2 The further improvements in policy and procedure planning are very welcome.

3.1.3 The operational areas where there remains a need for future improvement now relate almost entirely to the need for robust forward planning and marketing.

3.1.4 The energy and commitment of the membership, staff and volunteers underpins the work of The Moray Society and its museum. While continuing to build on the success of the Heritage Lottery project, the museum remains heavily dependant on unpredictable sources of external funding. Any fall in sources of income, such as admissions and subscriptions, gives cause for continuing concern as to the long-term financial stability of the museum.

3.1.5 This performance review a year ago identified an urgent need for the Society to adopt an appropriate forward planning framework. The Society is to be commended on the progress made thus far, but it is now vital that, without further delay, the museum puts in place an action plan that:

- identifies areas of strength and weakness, and pinpoints areas for improvement;
- identifies clear targets and objectives, with priorities and a timetable;
- identifies funding and other resources required to implement these actions; and
- implements a mechanism for regular monitoring, review, reporting and updating of the action plan

This approach is essential to put the Society in a position to focus on its key priorities and to meet the future challenge of applying for Museum Accreditation.

3.2 The Moray Council Museums Service

3.2.1 The independent museum and heritage sector in Moray plays an increasingly significant role in the interpretation of Moray's heritage. 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 Service continues to operate directly from three museums (two of which are Registered). These provide appropriate focus for museum and heritage activity in Forres (The Falconer Museum and Nelson Tower) and in Tomintoul. The Service achieved an overall increase in visitor numbers.

3.2.3 The Registered museum at the Anson Gallery in Buckie Library was withdrawn in order to allow an essential re-focus of learning-centre provision within the library

itself, and also to improve the long-term care of the Anson paintings. Work is now ongoing to provide access to the complete collection of over 800 Anson paintings through a digitisation project.

- 3.2.4 Improvements made within the service have been achieved through implementation of appropriate targets in the Libraries and Museums Service Improvement Plan, and areas identified for improvement are likewise included in the current three-year Service Plan.
- 3.2.5 Education and Interpretation remain areas for further improvement. The launch of the three-year Lottery-funded project at the Falconer Museum in April 2005 has provided a platform for these and other improvements.
- 3.2.6 There still remains a need to improve aspects of collections management and care, particularly the preservation of the collections, and the museums catalogue system. The Service is continuing to develop proposals in this area, including improvements to the computer-based Collections Management system as part of this year's ICT Action Plan.
- 3.2.7 The Moray Museums and Heritage Forum remains the focal point for delivery and support of museums services throughout Moray. Forum members have benefited from the 'Skills Building for the Future' project, in which Moray Council Museums Service is a partner, and which brings training to the sector, free of charge, to promote capacity building and skills sharing.

3.3 Service Overview

- 3.3.1 The museums under review achieved a combined visitor total of 32,881. The museums responded to a total of 1,111 enquiries, and met the needs of 1,427 school pupils either through visits to the museums or the loan of resources directly to schools. Both these figures have increased from the previous year. Volunteers contributed a total of 3,202 person-hours to these museums during the year, representing a 33% increase on 2004/05.
- 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 £2.68.
- 3.3.3 The financial and logistic support given by the Council to the Elgin Museum remains essential to allow it to continue to preserve and interpret the heritage of the area it serves. Accountability for this support is also essential through a robust framework of forward planning, monitoring, review and reporting.
- 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. The Sector continues to face the challenges of meeting strategic objectives set out by the Scottish Executive, with particular emphasis now on efficient government and the new Statutory Performance Indicators (SPIs).

4. Proposals

- 4.1 In order to ensure an appropriate robust Performance Measurement Framework for Registered Museums in Moray it is now essential to take additional account of the new Statutory Performance Indicators and the potential implications of the Museums Accreditation Scheme in addition to reviewing existing arrangements.
- 4.2 The proposed new performance review framework is set out in **Appendix II** to this report and has been discussed with the Moray Society.

5. Financial Implications

- 5.1 The financial support given by The Moray Council to Elgin Museum in 2005/06 was £16,200, the same as in 2004/05.
- 5.2 The annual revenue budget for the Moray Council Museums Service, net of income and financing costs but including the financial support to The Elgin Museum referred to above, was £230,494 (£202,928 in 2004/05). This difference is accounted for by increased property costs, associated particularly with the Forres Tolbooth and Dufftown Tower.

6. Staffing Implications

- 6.1 There are no staffing implications.

7. Environmental Implications

- 7.1 There are no environmental implications.

8. Sustainable Development Implications

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

9. Consultations

- 9.1 The Senior Management Team of Educational Services has been consulted and agree with the proposals.
- 9.2 The Moray Society has been consulted with reference to the provision of performance measurement data for the Elgin Museum, and to the proposals for a new Performance Review Framework.

10. Corporate Plan

- 10.1 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.
- 10.2 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.

11. Recommendations

11.1 In respect of the Council's Support to Local Independent Museums during 2005 - 2006 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. approve the proposals for a new Performance Review Framework for local museums in Moray contained in Appendix II.**

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Background Papers:

Ref: DMD/JR/Reports/Ed Com/9 August 2006/Policy for Support to Local Independent Museums: Annual Performance Review

The Elgin Museum

Operational Service Area	Total Attained	Total Possible	Percentage Compliance 2005/06	Percentage Compliance 2004/05
1 Service - Registration, Best Value, Targets, Performance Measurement and PI's, National Audit [†]	23	27	85	96
2 Facilities – Museums, Lab and Independents	6	6	100	100
3 Staff – Provision and Training	12	13	93	93
4 Collections – Policy, Documentation, Catalogue*	12	12	100	92
5 Preservation – Collection Care, Conservation	23	23	100	100
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*	6	6	100	83
11 Social Justice and Access Issues - Strategy, shortfalls, pilot projects, implementation, enhancements to displays, special equipment*	11	11	100	81
12 Education Service – Schools support, curriculum development, Resource development*	10	10	100	90
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*	8	11	73	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:

- Collections – regarding documentation procedures
- External Organisations – with regard to volunteering policy and procedure
- Access – with regard to Accessibility audit and policy development
- Education – with regard to policy development

The museum has suffered a drop in performance in relation to one service area. There remains scope for future improvement in the following areas:

- Service - in respect of the forward planning process
- Staffing – regarding formal review / implementation of the Museums Association Ethical Standard
- Marketing – in respect of market research, promotional planning and implementation

The Moray Council Museums Service

Operational Service Area	Total Attained	Total Possible	Percentage Compliance 2005/06	Percentage Compliance 2004/05
1 Service - Registration, Best Value, Targets, Performance Measurement and PI's, National Audit	27	27	100	100
2 Facilities – Museums, Lab and Independents	6	6	100	100
3 Staff – Provision and Training*	13	13	100	92
4 Collections – Policy, Documentation, Catalogue	12	12	100	100
5 Preservation – Collection Care, Conservation	21	23	91	91
6 Interpretation and Display – Research, Resource development, Refurbishment, Events*	15	16	94	88
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	6	6	100	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	100
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

** 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:

- Staffing – dedicated time for collections research
- Interpretation and display – the use of live drama to assist interpretation

Potential for future improvements remain in respect of:

- Preservation – in respect of long-term care of collections
- Interpretation – use of diverse media

- Access – consultation with specialist user groups regarding physical access
- Education – consultation in respect of curriculum

A performance review framework for local museums that receive financial support from the Moray Council.

- 1 It is a condition of the Policy for Support to Local Independent Museums that any local museum that applies to receive support from the Moray Council must first be registered, accredited or provisionally accredited.
- 2 Any local museum in receipt of financial support from Moray Council must undergo an annual performance review as follows.
 - 2.1 The museum must satisfy the Moray Council that it has maintained its status as registered, accredited or provisionally accredited under the MLAC legacy Museums Registration, or Accreditation Scheme.
 - 2.2 The museum must provide the Moray Council, on a quarterly basis (at the end of every March, June, September and December), with a copy of such Statutory Performance Indicator (SPI) information as is required by Audit Scotland. The museum will receive details of the nature of these SPIs via the Scottish Museums Council, and / or Moray Council. The Moray Council will include, with its quarterly return to Audit Scotland, these details for any independent museum to which it gives financial support.
 - 2.3 The museum must provide the Moray Council, at the beginning of its financial year, with a copy of its forward action plan for the next twelve months; acceptable to the Moray Council, based on the forward plan that has been accepted by its governing body, and duly reported under the accreditation scheme.
 - 2.4 The museum must report to the Moray Council museums Service, on a quarterly basis (at the end of every March, June, September and December), progress on completion of the actions in the action plan.
 - 2.5 The museum must provide the Moray Council with the following additional management information at the end of every financial year:
 - a) Total annual income for the period, broken down as follows:
 - Revenue Support Grants (Moray Council)
 - Grants (other than the Moray Council)
 - Donations
 - Sales
 - Sponsorship
 - Admissions
 - Subscriptions
 - Other (specify) Investment income
 - Activities
 - Total
 - b) Annual expenditure (net of any capital or financing costs)