



**The Future Resilience of  
Herefordshire Council's Museum Service**

**Final Report of Findings and Recommendations**

**P+P**

January 2018

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# The Future Resilience of Herefordshire Council's Museum Service

## Final Report of Findings and Recommendations

*Researched and written by*

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#### Status of Document

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## Executive summary

Nearly all publicly-funded museums and museum services throughout the country are facing severe, perhaps unprecedented, financial challenges.

Since 2010, local authorities in England have, on average, cut spending on museums and galleries, in real terms, by a third<sup>1</sup>. Nor is this trend restricted to council-delivered services. Three-quarters of former local authority museums, and hence now finding themselves in the independent sector, have reported a similar reduction.

Despite this, recent trends in visitor numbers have been relatively steady across-the-board with a small increase recorded in some sectors. To achieve this, museums, generally, are engaging with ever-widening audiences and developing ever-closer links to local communities and are actively supporting local tourism initiatives and, through this, their local and regional economies.

However, these gains have come at a price, with many museums and museum services facing difficult and often painful decisions. Balancing the books and reaching targets have led, in many cases, to reduced opening hours, curtailed school visits, diminished outreach, the loss of highly skilled staff and, in the most extreme circumstances, institutional or branch closures.

Other factors are also at work. There is no doubt that the exponentially-expanding digital revolution is having far-reaching social, economic, age-related and educational outcomes. The greater emphasis on commercial enterprise and income generation is changing the ways in which museums operate and, as importantly, are perceived to operate, whilst the economic, constitutional and social uncertainties occasioned by Brexit have been added to the mix.

But, museums, as institutions, are – and by definition will always be – uniquely placed to help people understand the world, their place in it, and the ways in which it can be improved for future generations.

The key issue now facing the museum sector is the best way – the most resilient and sustainable way – of delivering such services in the future. And this comes down to the ways in which all sectors of a local economy – public, private, educational, charitable, volunteer and so on – can coalesce around the service for its, and their own, future well-being.

In all this there is no single, one-fits-all solution. Each museum service has a unique history, a unique *raison d'être* within the community it serves, and thus offers a unique prospect.

Plotting a resilient future for the museum service in Herefordshire is the purpose of this report.

To its great credit, the museum service has in place all the necessary policies and plans to run a fully-Accredited<sup>2</sup> operation. The Museum Resource and Learning Centre (MRLC), opened by Herefordshire Council in 2008 with financial support from the HLF, is a first-class facility on a par with the best in the country and the service has dedicated and professional people committed to its operation and future role in the county.

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<sup>1</sup> Source: The Museums Association (2017) 'Museums in the UK: 2017 Report'.

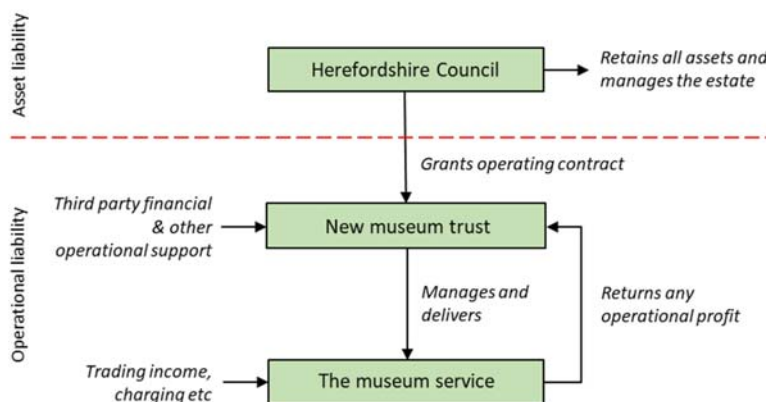
<sup>2</sup> The service has full Accreditation under the Arts Council programme which mean it satisfies nationally-agreed standards which inspire the confidence of the public and funding and governing bodies.

It has been supported by the Council to date, most recently in terms of its £80,000 investment in the redisplay and reinterpretation of the Black & White House Museum, and it is also recognised that, despite the pressure on the Council through decreasing central government funding, it has kept services running, albeit in some cases at a reduced level, and has thus managed to avoid widespread closures.

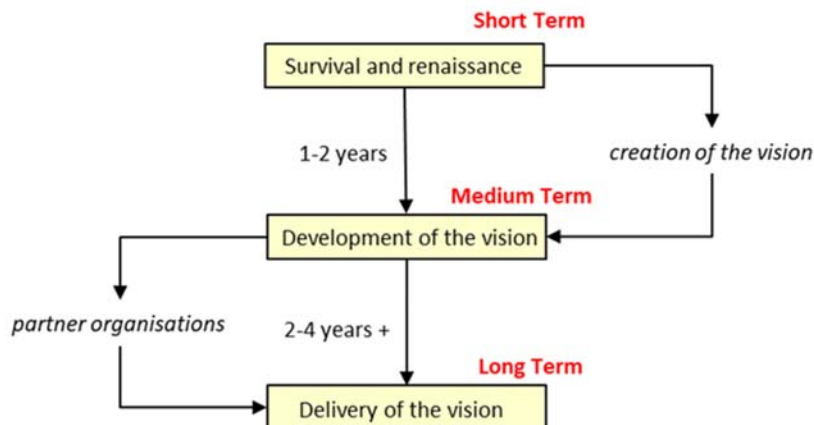
This report therefore acknowledges positively the Council’s actions by way of ‘invest-to-save’ support for income-generating activities, the rebranding of the Black & White House and in setting up the Council’s ‘Library and Museum Support Fund’ which is enabling community groups to build capacity, research options and to undertake income-generating activity.

There is no doubt that substantial goodwill exists to enable the museum service to move forward. The question is how.

This report recommends that – subject to a range of to-be-agreed contracts and other legal vehicles being implemented – the museum service’s operations (but not its assets in the first instance) are transferred to an (eventual) charitable company (trust):



To take this forward, the service needs a combination of (a) a long term vision and (b) a strategy to keep it both afloat and viable until that vision is realised. However, to get to this point, and recognising the fact that the Council has a public responsibility to deliver best-value in the context of defined and manageable risk, it is proposed that a phased approach is adopted, with each phase being underpinned by identified finance and partnering arrangements.



Initial discussions with a number of local companies and other organisations described in the main body of this report, as part of P+P’s work, have indicated that a way forward with all of them *could* be delivered for the benefit of the museum service as a whole.

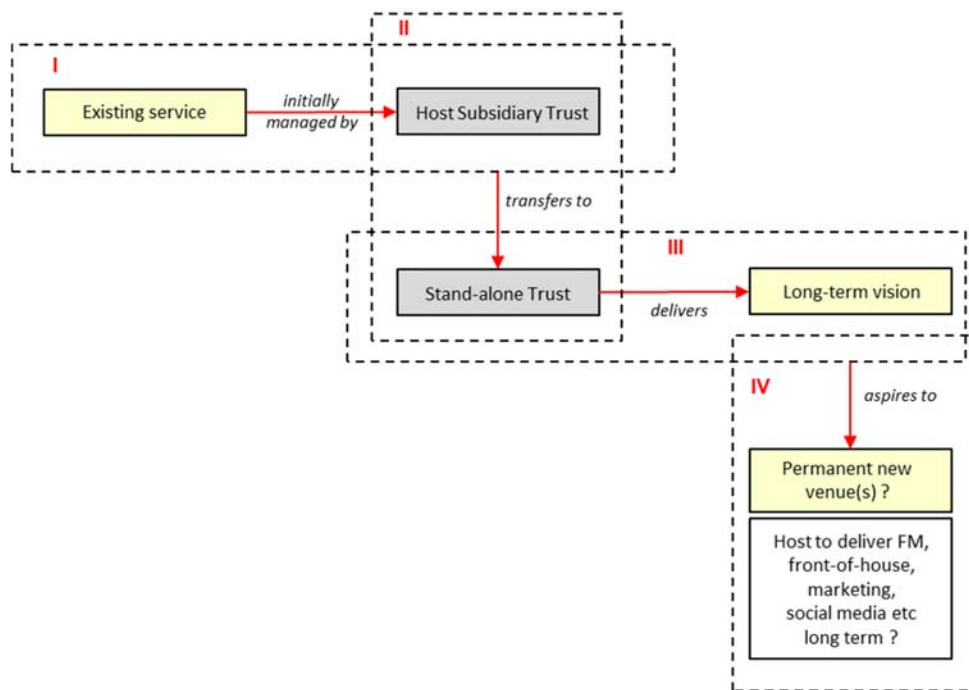
However, we are aware that a soft marketing exercise is currently underway that might attract attention from these and other parties. Therefore, nothing in this report should be read as giving these named organisations any form of commercial advantage in any future discussions with the Council as an outcome of the soft marketing exercise or any other process.

The proposals therefore call for the creation of an integrated plan for the short-, medium- and long-terms with each contributing to a resilient future on an incremental basis.

Moreover, the service cannot do this on its own and thus needs to engage with partner organisations in both local and national contexts. From the work thus far concluded, the following organisations have been identified:

- Herefordshire Council
- Halo
- The HLF/Arts Council
- HMSSG
- NMiTE
- Rural Media
- The Courtyard Trust
- Herefordshire College of Arts
- HerefordBID.

The resilience and development model can therefore be summarised as covering the short (I), medium (II) and long (III/IV) terms as:



In this model the Council transfers responsibility for the operation of the museum service to a newly-formed host-led subsidiary trust (I) which it operates as a division, or unit, within the company by employing the museum staff who then develop exhibitions and other outreach services using some of the host’s current outlets, as well as other identified spaces.

This also gives the opportunity to develop a new brand for the service as well as it being able to operate on a county-wide basis from its headquarters building in Friars Street, which must be retained.

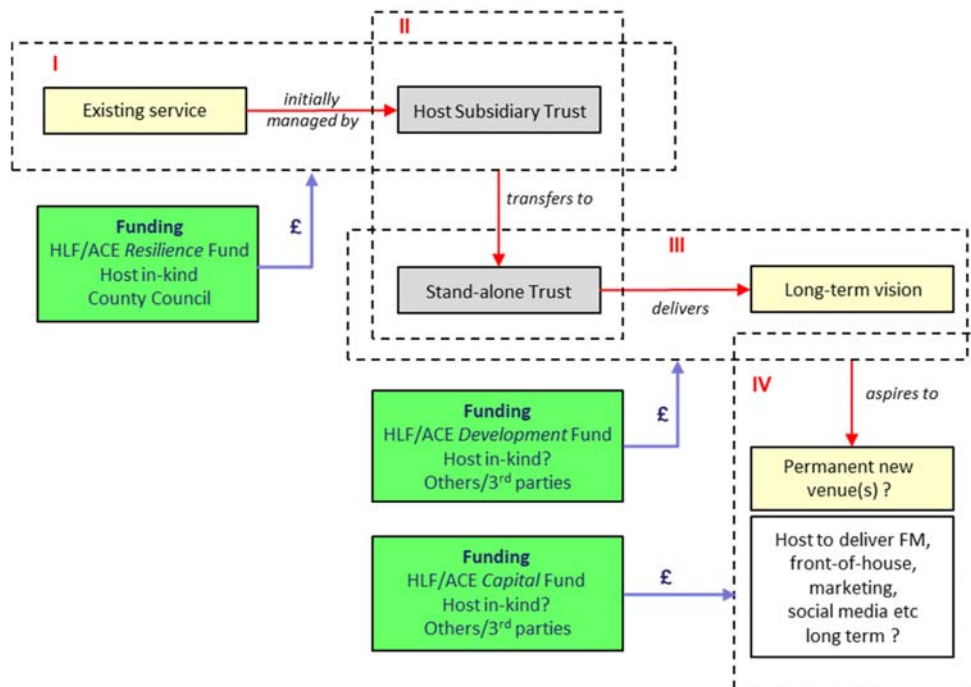
The medium-term aim is to create a new, fully-independent trust (III) which will develop a long-term vision for the service focused on a new venue for its public-facing operation (IV), perhaps at the Museum and Library in Broad Street or elsewhere, and perhaps in association with NMiTE.

This approach has the clear advantage that it does not second-guess future decision-making by any party. For example, if the Council wishes to establish a larger, Museums, Libraries and Archives (MLA) trust sometime in the future, perhaps as an outcome of its current soft marketing exercise, the proposed museum trust *could* become part of it.

Putting a timetable to all this is very difficult. It may be, for example, that Phase I could operate for two-to-three years, Phase II could be an overlapping two years or so, and the planning, design, creation and occupation of the new venue (III/IV) perhaps seven years.

This is clearly a long-term project, the early years’ funding of which need to be secured.

A number of sources of funding and other support is theoretically available to support this transitional process, from the County, the host organisation, the HLF/Arts Council (ACE) and others including NMiTE and Rural Media.



In summary, Phases I and II could, indeed it is proposed should, be funded by a combination of Council funds, an in-kind (non-cash) contribution from the host organisation and monies from the HLF or ACE by way of Resilience funding.



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In this respect, the Council could use an Invest-to-Save strategy to fund Phases I and II and could also make funds available through its Prudential Borrowing powers for later Phases.

Hence, Phase **III** – the working up of the long-term vision by the trust, *could* be funded by a combination of the council, the HLF/ACE by way of a Development Grant, the host organisation by way of its continued in-kind support, and yet-to-be defined third parties by way of their contributing to the new service.

Phase **IV** – the delivery of the long-term vision by the new trust – will need HLF/ACE capital funds as well as additional, third party funds perhaps through other trusts, foundations and the like, together with possible additional private sector investment. The model tentatively suggests that the host organisation continues to deliver public-facing and FM services on a contracted basis.

One major local player in the delivery of the long-term vision could well be NMiTE.

As new a university, NMiTE is highly committed to its future role in the wider cultural development of Herefordshire and sees the museum service as being a key player in the overall offer of the county. Initial discussions have indicated that, subject to further progress, NMiTE would be willing to include a new museum development in its evolving masterplan, with the optimal arrangement being for the university to provide, on campus, a range of spaces for the display of museum exhibitions drawn from the service's collections at the MRLC as well as having the ability to accommodate national and international standard (Government Indemnity) touring exhibitions. An alternative site might be the existing Museum and Library building on Broad Street which, if remodelled, could become a cultural resource hub for both the university and wider community.

Once Phases **I** and **II** have been achieved, the chances of delivering Phases **III** and **IV** will be greatly enhanced since momentum will have been created and, no doubt, public support engaged.

The HLF and/or ACE are cited as sources of funds for each of the four stages. The Council has, at present, a good working relationship with the HLF (indeed it has funded the current study) and this is the type of resilience-led, phased approach currently favoured by such public funders.

In essence, this is shaping up to be a series of back-to-back 'project finance' arrangements<sup>3</sup> whereby, in this sense, the project can only proceed through its various phases once all the elements for each phase are to hand.

This approach has the further advantage that the service will be able to operate viably and resiliently during each of the four Phases. Thus, if for some reason Phase **IV** takes longer to deliver than anticipated, the trust can still operate for as long as necessary under the Phase **III** arrangements.

There is clearly the need for period of negotiation with all interested, and named, parties should a decision proceed on these lines be made, in due course, by the Council.

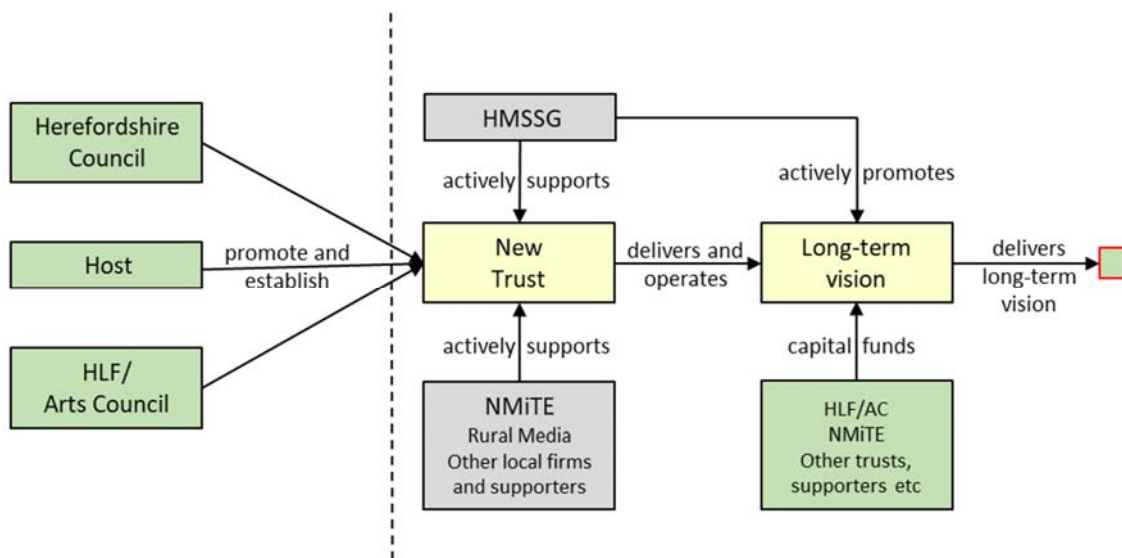
There is also the challenge of the trust attracting grants and other financial support for the long term, especially for Phase **IV** (+/- 5years). This is where the potential involvement of, particularly, NMiTE comes into play in association with the then-on-board trustees.

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<sup>3</sup> This definition, which means a time-defined, financially-restricted 'project', should not, and does not, imply any connection to the *Private Finance Initiative* which has very different origins and very different financial profiles and arrangements.

Thus, the research for this report supports the view that, if the Council wishes to ‘spin-out’ its museum service, a mechanism using an interim, subsidiary trust which leads to the creation of a stand-alone trust in the medium-term is potentially viable and sustainable that could re-energise the service, starting sometime during the next financial year (FY 2018-2019).

From the first-hand research undertaken for this project it is possible that the following arrangements could contribute to the overall model through a number of finance-limited and time-limited engagements:



In terms of overall timing, the four-phase delivery plan, culminating in the delivery of the long-term vision, could emerge as:

Financial Year	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Project Year	1	2	3	4	5	6
Phase I						
Phase II						
Phase III						
Phase IV						
Phase I	Transition period	Service managed as a subsidiary of Host				
Phase II			New trust is formed			
Phase III			Long term vision is created by the new trust			
Phase IV			Vision is delivered by the trust and its partners			

It should be noted, however, that whilst such a timetable is desirable, it is not – in and of itself – essential to the support and delivery of a resilient museum service.

In terms of finance, the model proposes the timely interplay of the following entities over Phases I and II:

- Herefordshire Council
- A 'host' charity
- The HLF and/or the Arts Council
- NMiTE
- Other local firms and supporters.

If this were to be the case, the following base model *could* apply in that it covers a five year period and thus the first two Phases of the four-Phase plan set out above.

		Phase I			Phase II		
		←			→		
A	B	C	D	E	F	G	
1	<b>Year</b>	1	2	3	4	5	
2	<b>Current Operational Position</b>						
3	Museum operations budget (1)	67	67	67	67	67	335
4	Projected trading income (1)	0	0	0	0	0	0
5	Net annual subsidy	67	67	67	67	67	335
6	Cumulative	67	134	201	268	335	
7	<b>Proposed Operational Position</b>						
8	Cost - museum operations (2)	250	250	250	250	250	1250
9	Cost - premises etc (3)	0	0	0	0	0	0
10	Return to Host	0	0	0	0	0	0
11	Net annual subsidy	250	250	250	250	250	1250
12	Cumulative	250	500	750	1000	1250	
13	<b>Proposed Funding Scenario</b>						
14	HLF Resilience Funding	100	100				200
15	HLF Development Funding			125	125	125	375
16	Host in-kind Investment (4)	40	40	40	40	40	200
17	Herefordshire Council (5)	112	112	112			336
18	NMiTE	0	0	0	0	0	0
19	Projected net trading income	83	95	109	125	144	556
20	Net annual income	334	347	386	290	309	1667
21	Cumulative	334	681	1066	1357	1667	
22	<b>Outturns</b>						
23	Annual	84	97	136	11	59	387
24	Cumulative	84	181	316	327	387	
25	Visitors	75	86	99	114	131	506
	<b>nb</b>	all cells are £000 over a full financial year and exclude inflation and VAT; allow for rounding					
	1	includes £30K annual, trading income, but remains the base-line support figure					
	2	staff costs of £200K plus an exhibitions/curatorial operational budget of £50K					
	3	nett zero over the period as assets remain with the Council					
	4	non-charged premises and services costs, including staff time					
	5	contribution by Herefordshire Council by way of operational subsidy and 'invest to save'					

Phases I and II are shown to overlap as, at this stage, no specific projection can be made as to how long each, individually, will run. It is, however, anticipated that the main trust will take control of operations in or around years 3 or 4 (FY 2020-2021 or FY 2021-2022).

In the model **rows 3 through 7** summarise the projected cost of the museum service from Year 1 to Year 5 under the current arrangements. In total, this would imply an as-now policy investment of net £335K by the county over the period assuming that a total of (same period) £67K a year.

The cost of the museum premises have been set at zero as Phases I and II do not suggest a transfer of assets from the county.

**Rows 8 through 12** show the operation of the model moving towards independent status from Year 3, ie the proposed arrangements.

In essence, operational costs (row 9) are over-doubled and comprise staff costs of £155K (measured over 7 fte) plus a £50K a year budget to mount up to around four in-house-created travelling exhibitions in yet-to-be-determined venues across the county as well as including such items as collections care equipment, collections management database annual fee, refreshing handling resources, membership fees such as AIM, MA, Art-on-Demand and other contributions estimated at between £7K and £8K a year in total.

On this basis, the total cost over five years is projected to be £1.25m (row 12, col G).

**Rows 14 through 21** describe one way in which the service can move towards independence (spinning-out) from the Council by way of the following investments:

- £200K from the HLF by way of a Resilience Grant paid over the first two years<sup>4</sup> (row 15)
- £375K from the HLF by way of a Development Grant paid over three years to begin the trust's long-term development programme starting in year 3 (row 16)<sup>5</sup>
- £200K from a host organisation by way of equal, in-kind amounts over five years as investment in the future of its broader cultural offer in delivering its business development plan (row 17)
- Row 17 shows £336K from Herefordshire Council by way of rolling up the first three years operational expenditure (£67K x 3 = £201K) plus bringing forward two further years at £67K (=134K) as 'invest-to-save', resulting in a flat, three year up-front commitment of £112K a year (=£336K over the five years)
- Row 18 indicates the long-term involvement of NMiTE without assigning any direct financial contribution at this stage, although it could be significant in later phases
- Row 19 shows a net trading income stream from the service's operations at an estimated 110p (net) per attracted visitor. This includes returns from the operation of the Black & White House, the Museum on Broad Street and the MRLC. In addition, at least four other venues a year are envisaged through the relationship with the host organisation, each of which should carry a range of dedicated merchandise. This level of return should be the *minimum* expected each year, particularly as the service's staff will have been freed from the day-to-day activities to be undertaken by the host organisation and can thus concentrate

<sup>4</sup> The HLF can make grants of between £3K and £250K to 'help organisations strengthen their organisation, and build the capacity of ... staff and volunteers to better manage heritage in the long term'. [www.hlf.org.uk/looking-funding/our-grant-programmes/resilient-heritage](http://www.hlf.org.uk/looking-funding/our-grant-programmes/resilient-heritage)

<sup>5</sup> These funds are part of the HLF's 'Heritage Grants' programme which offer funds in excess of £100,000 for new projects. There is no upper limit on the amount, and the application is a two-stage process. The funds shown in the model are for Stage 1 (*development*) funds after which Stage 2 (*capital*) funds can follow. The use of these last funds will be for the development of a new museum facility and associated elements, perhaps at the revitalised Museum and Library Building in Broad Street. Further information is to be found elsewhere in this report.

on exploiting returns from both the new physical locations, events and offerings via a more considered digital presence in association with Rural Media, its proposed strategic media partner. There also needs to be a more aggressively market-oriented approach taken by the service’s staff towards earned income, and this may well be facilitated by the move towards the long-term trust option and the creation of a separate brand.

**Rows 22 to 24** show the likely financial outturn of these proposals, in part based on the number of visitors who will engage with the service (row 25).

At 131,000 visitors a year across all venues in the county in year 5 (row 25) the service would still be down on the level of some fifteen years ago, although based on an upward trend. The key, of course, is to continue growth from this new base.

In summary, the model looks to spin-out the service to a newly-formed and able trust over (say) three-to-four financial years from the get-go.

In addition – and very importantly – the museum staff would have immediate access to a larger budget, would be free of time-consuming administrative and facilities management duties, and would thus be able, indeed charged, with delivering visitor numbers back to levels not seen since the early 2000s for which they will have access to county-wide facilities. This is their challenge.

Moreover, this Phase I/II model sets up the service to move towards Phase III and the operation of the long-term trust, during which, it is anticipated, the host organisation would remain on hand to offer continued advice and support whilst discussions with NMITE gather pace.

If this scenario holds good, the percentage investment by the three key parties over the 4-5 years’ run of the model would be:

Source	£000	%
HLF Resilience Funding	200	12%
HLF Development Funding	375	22%
Host in-kind investment	200	12%
Herefordshire Council (5)	336	20%
Trading Income	556	33%
<b>Totals</b>	<b>1667</b>	<b>100%</b>

} HLF 34%  
Host (in kind) 12%  
The Council 20%  
Trading Income 33%

If such an approach were to be pursued by the Council it is clear that a number of factors will need to be taken into account including, but not restricted to, (a) a forensic examination of the recommendations and associated simple cashflow model; (b) a consideration of the legal parameters for asset transfer and retention; (c) the implications of failure to deliver the service long-term in the eyes of the public and, tangentially, the HLF by way of the recovery of past grants; (d) whether the suggested partners and associates are acceptable to both the Council and to each other.

As with any development project, no matter how well-funded in theory, there are always risks. And this project is no exception. The key is thus to try to minimise them.

To do this up-front we have suggested that this is a project finance deal ... no money is spent, no deals are done until all monies are to hand and all parties are prepared to sign up.

With this as the basis it is also clear that future (3+ year) funding needs to be in place at some point and the above model suggests how this can be achieved.

However, a risk exists in the notion as to what happens if the transfer/development fails and the Council is left to deal with the outcome, say in Phases I and II?

To manage this risk, it is proposed that the museum service be required to produce, on behalf of its partners (in the first instance the Council, the HLF and the host organisation), a rolling five year business plan which is reviewed annually and presented for formal approval, particularly in terms of how each's financial investment is performing. We have no doubt that both the HLF and the host organisation would require nothing less.

This approach ensures that financial and other liabilities are restricted to one operational year for Phases I and II and until such time as the self-supporting Trust (Phase III) is in place.

In summary, this report has set out the principles underlying the development of a potentially resilient museum service for Herefordshire over the short-, medium- and long terms.

The approach requires, and is in part dependent on, cooperation and constructive inputs from a number of parties including the Council, the HLF/Arts Council and HMSSG, along with other interested parties named in this document.

It is also recognised that a period of reflection, debate and consideration will be needed before a decision by the Council can be made, part of which will no doubt be the assessment of Expressions of Interest received as a response to the Council's soft-marketing exercise for the operation of the MLA service, either in part or as a whole.

There is no doubt that internal papers will need to be prepared, briefs and the like issued, discussions will need to be had. Staff and Councillors will need to be involved. Due constitutional process will need to be followed against the background of entirely transparent decision-making procedures particularly in terms of competitive tendering for future activities. On the current timetable it is anticipated that a formal decision will be made by the Council in May 2018.

Clearly, there are a number of well-rehearsed and contractually-sound ways in which future negotiations could emerge following activities related to 'preferred bidder', 'competitive dialogue', 'two-stage tendering', 'restricted tendering' processes and so on, but it is important to record at this stage that, as part of this process, a series of discussions and other meetings will need to take place leading to the production of, via Letters of Intent in the first instance:

- Draft heads of terms by way of a Memorandum of Understanding between the Council (museum service) and partner organisations
- Draft heads of terms between the Council (museum service) and NMiTE that sets out the principles behind the creation of a new, permanent gallery and exhibition facility to be co-located with NMiTE in the city centre, perhaps as part of the new university campus
- Further and more in-depth discussions with a strategic media partner
- Initial discussions with NMiTE as to the location, design, configuration and layout of new exhibition space(s) within its emerging campus/city centre masterplan, after having previously developed a brief with the museum service
- Principles behind the scope and creation of a new trust for the long-term operation of the museum service
- Briefing documents for potential trustees including the principles behind the trust, person specification(s) and the application process

- Training workshops for potential trustees
- Initial applications to the HLF/Arts Council for the receipt of Resilience Funding to assist in the transfer process from the Council to the new trust.

In addition:

- The museum service should look to plan immediately its first year of in-house, touring exhibitions at to-be-selected venues
- Begin the process of drawing up job descriptions for the recommended new staff posts
- Start the process of creating a new and distinctive brand.

The precise way(s) in which such tenders are to be offered is not a matter for P+P, but rests with the Council and its well-rehearsed procedures.

This report has set out a flexible, justifiable and viable, real-world-responsive model for the future of the museum service in Herefordshire.

Whilst it has described a potential future, it has recognised that at each step on the way issues will arise, challenges will occur and decisions will be made that will affect it one way or another.

The resilience model presented in this report, whilst recognising that a smooth way forward is obviously preferable, has been set up to accommodate and respond to such changes as and when they arise so that a viable future for the service can be maintained.

It is also clear that further work on all aspects of the proposed model is needed and that, if at all possible, continuity in the process is maintained.

To ensure that this takes place implies that pump-priming funding will be required sometime in the New Year.

In light of all this, a more detailed activity programme from January 2018 can be projected to be:

<b>A</b>	Consider other development programmes (eg, soft market test) to consider recommendations for the museum service	Feb 2018
	Feedback to stakeholders	Mar 2018
	Present options and recommendations to Cabinet	May 2018
<b>B</b>	Implement agreement of Herefordshire Council Cabinet on future delivery options	Jun 2018
	Funding for next phase of feasibility and development work	Jul 2018
	Instigate process for supplier of the service based on an outsourcing model, preparation work eg, TUPE, legal and finance	Dec 2018
	Outline agreement in place and transition period - January to end of March	Mar 2019
<b>C</b>	Operation and delivery	Apr 2019
<b>D</b>	Review and further development	Apr 2020

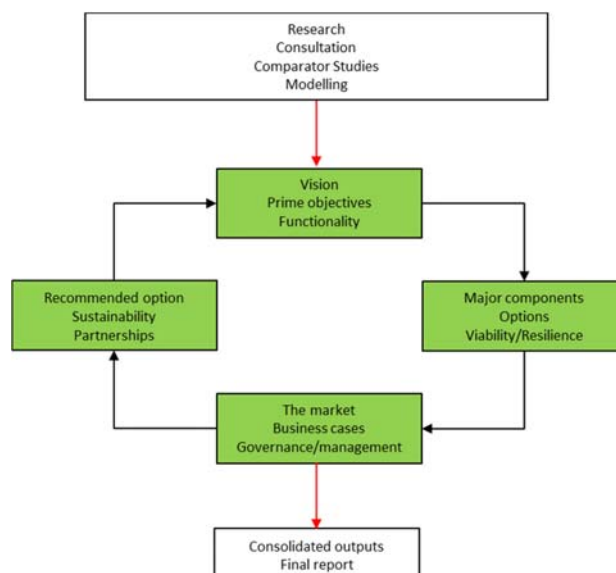
## 1.0 Introduction and defining principles

Prince + Pearce (P+P) was commissioned in September 2017 by Herefordshire Council in partnership with Herefordshire Museum Service Support Group (HMSSG) with funding from the Heritage Lottery Fund (HLF), to report on the future resilience of the county's museum service based on (a) a vision, (b) forward plan and (c) a business model for the service that would necessarily consider the future options for the delivery of the museum services by way of:

- The management and governance of the service, including as a spin-out service
- Financial considerations including income generation for long-term sustainability of the museum service
- Maximising the display of, and access to, the collections
- Reviewing the museum service in the wider context of other programmes including the 31 Broad Street project, the cultural strategy and the new NMiTE University.

The work was a review of the museum service as a requirement of the funding award rather than the broader Museums, Library and Archive Service (MLA) and was therefore focused on the collections and potential offer that could be made by the service at the three locations it currently operates: the Black & White House Museum in High Town, the Museum Resource and Learning Centre (MRLC) in Friar Street, and the Museum and Art Gallery in Broad Street, together with any others that might emerge from the study. All the sites have a desire to stay open: the Museum and Art Gallery in Broad Street as the main gallery in the city, the Black & White House Museum as source of earned income and the MRLC by way of it providing access to the full range of the service's collections.

The study thus has the overall objective of producing costed, resilient business development options for the museum service based on a new vision for its future, sustainable operation and management, including potential governance arrangements and interpretive and other deliverables, all in the context of the wider cultural and education environment of the city and its county. The approach taken by P+P, summarised in the fluid model below, was to critically assess, analyse, interrogate and re-interrogate the substantial amount of background information made available to the study, engage with stakeholders and other interested parties to produce a viable and – above all – sustainable way forward for the service as a whole, irrespective of its location.





## 1.1 Resilience

Herefordshire's museum service has arrived at a fork in the road which is putting great demands on it in ways that are severely testing its resilience.

Whilst the Council has supported, and continues to support, the service by way of capital injections for defined projects and general revenue support, there is no doubt that change is in the air manifested by (a) the fact that the current work has been commissioned and (b) there is, in parallel with this work, a soft market testing exercise underway to help to determine the future of the Museums, Libraries and Archive service (MLA) as a whole.

If 'organisational resilience' can be defined as the 'ability to anticipate, prepare for, and respond and adapt to incremental change and sudden disruptions in order to survive and prosper'<sup>6</sup>, it encumbers the museum service and those who care for it to take active steps to ensure its well-being over the short-, medium- and long-terms.

Since the global financial crisis of 2007-2008, the concept of resilience has emerged as a practical and much-needed response to the pressures placed on organisations, particularly public services, through a sustained period of financial constraint underpinned by relatively slow economic growth, the effective freezing of public-sector pay and the year-on-year reduction to public revenue for 'non-ring-fenced' services, non-statutory and even statutory services seeing cuts in base budgets.

This has necessitated fresh thinking by boards, regulators, staff, suppliers and customers to address effectively the issues of operational security, risk and survivability. This is particularly relevant today as some commentators are predicting a further financial squeeze as the lessons learned from 2008 are forgotten<sup>7</sup> and as uncertainty over the specifics of Brexit intensifies.

Developing a resilient model is not a quick fix. It is not a matter of identifying a large, eye-catching project with an attached, eye-watering budget. And it is simply *not* about the ability to survive.

Resilience demands a move beyond a posture of defensive security into one requiring a positive and proactive mind-set that enables both strategic and tactical decisions to be made leading to the re-emergence of the service in ways that will ensure future growth in an environment of continuing, but diminishing, managed risk.

Such a resilience-led plan for the museum service in Herefordshire thus requires a strategic objective (vision) coupled with the practical steps (tactics) required to move towards that vision, accepting that it may take a long time to get there. Thus, the vision becomes the target.

Each tactical decision taken on the way towards the ultimate delivery of the target must contribute to the resilience of the service as a whole. Under no circumstances should a tactical decision be made that reduces the resilience of the service at the time the decision is made.

In this context it should also be remembered that successful museums, museum services and related 'heritage' organisations take a considerable time to build<sup>8</sup>. A resilient service thus focuses on

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<sup>6</sup> British Standard, BS-65000 (2014).

<sup>7</sup> *The Financial Times* (31 July 2017) 'The sequel to the global financial crisis is here'.

<sup>8</sup> When Octavia Hill and her colleagues founded The National Trust in 1895 they could not have imagined that in 2018 it would employ 6,000 staff, have over 60,000 volunteers, 4.5 million members and turnover nearly £0.5 billion a year. Similarly, when Ironbridge Gorge Museum Trust was founded in 1968 it ran one museum. It now manages thirty-five historic sites within the Ironbridge Gorge World Heritage Site, including ten museums.

incremental growth, with each new initiative or activity building on the last whilst not weakening the whole.

Such a resilient service is not risk-averse. It is one that identifies risks realistically, manages them accordingly, assigns them to the organisations most able to cope with them, and delivers value for money.

## 1.2 Resilience and Value for Money

This report is not about reflecting on what can or could be done in a period of continued austerity, nor is it simply about saving money: it is about creating a service that can look beyond the museums into the wider leisure and learning environments of Hereford and its county to make a real and highly valued contribution to the future well-being of both; and which will thus, in and of itself, demonstrate resilience.

The emphasis is thus firmly focused on *value, delivery and benefit*.

Value for money (VfM) is usually defined in terms of the combination and interaction of three descriptors: economy, efficiency and effectiveness: the objective being to create an acceptably low-cost, high-productivity service delivering successful outcomes and which is, as far as possible and realistically projectable, future-proofed.

The key to VfM in the museum service over the long term, as it applies to the wider economy of Herefordshire, is in generating two key outcomes: (a) increased overnight stays and (b) the uplift of rateable income through the regeneration of urban areas: so-called Planning gain in the urban realm.

If visitors can be encouraged to spend just one extra night in the county then the benefits for jobs, local firms, hotels and the general infrastructure would be significant<sup>9</sup>. Moreover, if the reimagining of the service leads to the ongoing engagement of profitable businesses in (say) Broad Street then real Planning gains can be realised.

But VfM can be seen in wider terms than simply monetary value. The whole concept of *Social Return on Investment (SROI)* is a principles-based method of attempting to assess any intervention's extra-over financial value that can offer real returns to a community.

These values may emerge in terms of environmental, cultural, educational or social benefits that simply cannot be measured using standard accounting techniques.

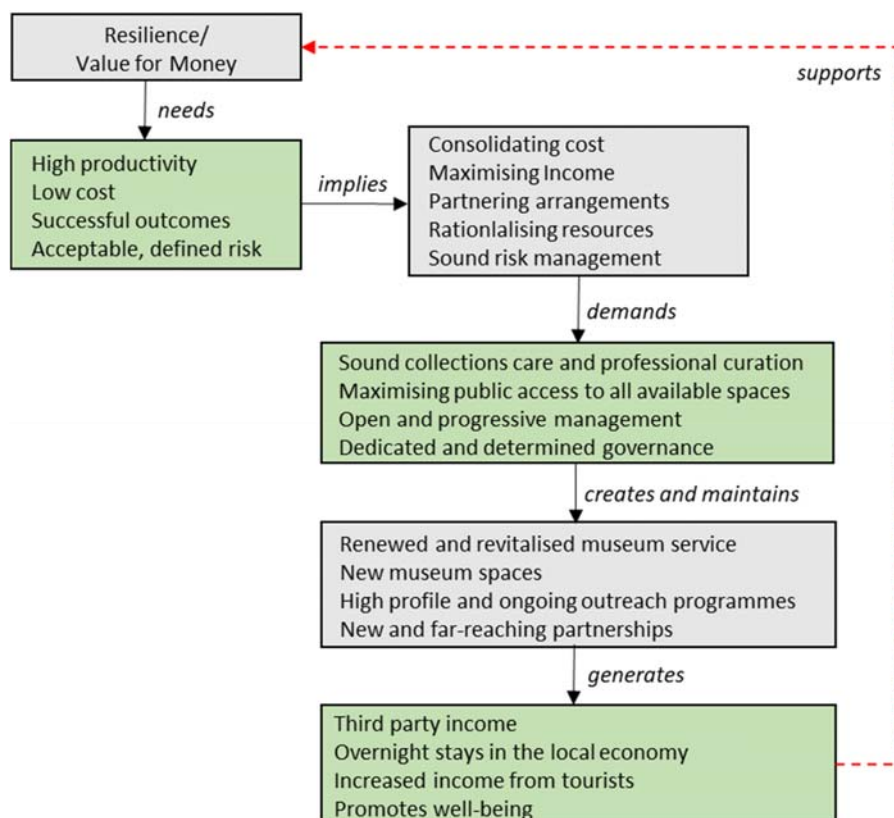
A number of organisations<sup>10</sup> have established methods of assessing SROI, most using a combination of qualitative and quantitative inputs that produce information summarising the intervention's positive social-return outcomes.

As these methods are used on real projects, all that can be said here is that it is highly likely that the interventions described in this report will add significantly to the overall VfM considerations set out by the following analysis by adding to the social returns across Herefordshire:

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<sup>9</sup> Whilst little research has been undertaken in the UK, in the USA work by the *American Alliance of Museums* suggests that, on average, 'museum tourists' spend 63% more in the local economy than 'average' travellers. Source: American Alliance of Museums website, accessed November 2017.

<sup>10</sup> See, for example, Millar; Hall (2012). "Social Return on Investment (SROI) and Performance Measurement". *Public Management Review*. 15: 923–941



### 1.3 The situation in Herefordshire

Herefordshire, one of the UK's most rural counties, has a comparatively small and ageing population coupled with a low population density (840 square miles in total at an average density of 220 people per square mile; 98.2% of whom identify as being 'white')<sup>11</sup>.

Heritage is considered as being an important part of the tourist offer and thus of the economic future and well-being of the county. Of the eighteen museums in Herefordshire, only two are owned and operated by the Council; the remainder are independent in the sense of being funded and either wholly or substantially volunteer-governed and operated.

Physical barriers to accessing 'heritage' and the broader cultural sector in the county include the fact that the museums are not open every day and that (in common with other rural areas) there is relatively poor connectivity via public transport<sup>12</sup>.

Since the late 1990s, when it employed around 18 fte staff<sup>13</sup> and operated throughout the county with highly-active outreach and touring programmes, the service has witnessed a reduction in the base budget and less income opportunity to pay for areas such as schools programmes. The team now consist of 4.81 fte staff (FY 2018-2019) and is under great resource pressure to be able to keep the

<sup>11</sup> 2011 UK Census: ONS

<sup>12</sup> Primary source: *Countries of Culture Inquiry* – submission by the Friends of Herefordshire Museums and Arts.

<sup>13</sup> Source: Herefordshire Museum Service.

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Museum and Art Gallery in Broad Street open on a regular basis, with funding for educational, touring and associated programmes no longer available.

There are a number of groups actively supporting various cultural and heritage activities, and the Herefordshire Museum Service Support Group, HMSSG, is highly committed, not just to maintaining the service as it is, but to aid its expansion and hence its contribution to the social and economic infrastructure of the county.

In addition, the Herefordshire Cultural Asset Network (HCAN) and the Hereford Library Users Group (HLUG) have been active, as have others including the '31 Broad Street Group', in focusing attention on the Museum and Library building in Broad Street as a potential venue for a new cultural hub and associated facilities.

To its great credit, the council's museum service has in place all the necessary policies and plans to run a fully-Accredited<sup>14</sup> operation. The Museum Resource and Learning Centre which opened in 2008 with the help of HLF funding, is a first class facility and the service has dedicated and professional people committed to its operation and future role in Herefordshire.

In all this it has been supported by the Council to date, most recently in terms of its recent £80,000 investment in the redisplay and reinterpretation of the Black & White House.

The museum service has also been under great scrutiny and pressure over the last few years, with a raft of studies and reports (both internal and external) considering its future. All these have been made available to us on an open-book basis.

Despite the pressures on local authorities through decreased central government funding, Herefordshire Council has kept services running, albeit in some cases at a reduced level, and has thus managed to avoid widespread closures.

We therefore acknowledge positively the actions of the council regarding 'invest-to-save' support for income-generating activities, the rebranding of the Black & White House and in setting up the Council's 'Library and Museum Support Fund' which is enabling community groups to build capacity, research options and to undertake income-generating activity.

The HMSSG has been highly active in supporting the museum service by focusing on governance issues, working with the Council to attract HLF Resilience funding, firming up its own organisational capacity and transparency by becoming a registered membership charity.

In addition, we commend the instigation of the LGA Peer Review, and the Council and HMSSG and for applying to the HLF Resilience Fund thus demonstrating clearly that there is support both within the Council and the wider community for jointly-finding a sustainable future for the museum service.

There is no doubt that the large, historically important, culturally significant, well-curated and documented collections held by the County could underpin a revived and reinvigorated service. Many are of national or international significance<sup>15</sup>.

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<sup>14</sup> The service has full Accreditation under the Arts Council programme which mean it satisfies nationally-agreed standards which inspire the confidence of the public and funding and governing bodies.

<sup>15</sup> 2014: Herefordshire Council Tender Specification for the Operation of Herefordshire Museum Service including Hereford Art Gallery and Museum, Old House (Hereford) and the Museum Resource and Learning Centre.

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The collection is owned predominately by Herefordshire Council with only a relatively small number of items on loan. They comprise a range of subjects covering archaeology, social history, costume and textiles, fine art, decorative art and furniture, documents, photographs, numismatics, arms and armour, ethnography, and natural sciences including geology<sup>16</sup>.

From the rich archaeological evidence of the city and its county, its role as a fundamental pillar in the creation of England under Athelstan, to its history as a Marcher Town, the Wars of the Roses and the Civil War, Hereford has played a part in every major period of English history. But there is more ... its siting and situation, its natural history, its cathedral, the demise of its castle (once said to rival that of Windsor), its later history as an agro-industrial city ... all these matter, all are real, all have left their mark, resonate with its people, and all are available for interpretation and use by a refreshed museums service.

Museums are just one manifestation of the great story-telling tradition of all peoples, everywhere and at all times. There is thus – and can never be – no shortage of material, a shortage of ideas, of ways to engage.

What is needed – indeed demanded by the material held by Herefordshire – are ways to deliver it to a public who, under the right circumstances and presented in the right ways, will come to see it, enjoy and appreciate it, and who will then wish to tell others about it.

Responding to significant financial and other pressures from central government and elsewhere, the Council is now looking, by way of a soft market testing exercise, at the option of spinning-out the museum service into some form of third-party, arms-length organisation. Under such circumstances, this is not an unreasonable position for the Council to take, and there are examples throughout England where such a strategy has proved successful.

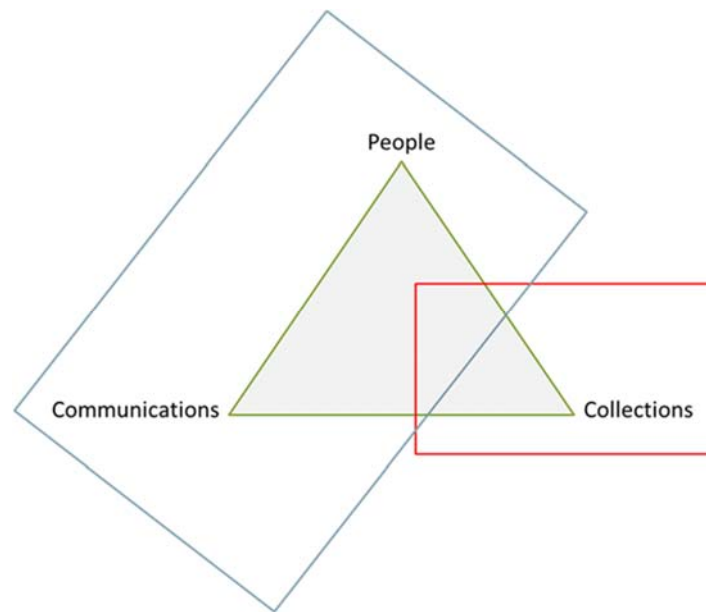
If this were to emerge as the recommended option, what is required is a renaissance for a ‘new’ museum service in that it must be bold, imaginative and reinvigorated, and delivered by people with a passion and a desire to see the collections, buildings and interpretations reach out to communities and visitors to the county in ways that lead to its long-term well-being. This applies to all those involved: staff, volunteers and future governors.

Whilst academic rigour underpins the work of all good museums, communicating the results of this academic endeavour needs to be the driving force. Every generation re-visits its past, including the objects from that past, and each creates new meanings and new values. For museums to prosper in the 21C they need to be aware of this and become embedded as institutions at the centre of a place’s cultural offer.

To satisfy both the visitor and resident markets they must offer changing attractions, events and opportunities alongside core stories and core exhibits. They must balance the twin demands of caring for the collections they hold whilst affording maximum access to them.

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<sup>16</sup> As well as displays, access to the collections is also through educational activity, special events and campaigns, and digital media.



All this is, of course, well known to the professionals running the museum service and is recognised by the Council in its summary of the service’s benefits to the community as:

- Supporting the county through tourism
- Education and learning on the history of the area
- Local pride and local identity by providing a sense of place and heritage
- Provides the ability to research family history and local history
- Opportunities for volunteering
- Support for voluntary and community museums and heritage centres
- Specific projects involve target groups
- Supports *Fives Ways to Well Being* – social connections, being active, being curious, learning something, and helping others.

## 1.4 Hereford and Herefordshire as tourist destinations

Whilst statistics regarding the number of people who visit a place, perhaps staying over and spending money, are generally to be taken as broad estimates, there is no doubt that the city and its county are very popular with both tourists and day trippers.

A broad range of estimates suggests that, on average, roughly 7 million visits are made to Herefordshire each year<sup>17</sup> (two-thirds of which are day visitors) that, in total, contribute around £400 million (gross) to the local economy and, by so-doing, support over 6,000 direct jobs and somewhere in the region of 18,000 indirect ones<sup>18</sup>.

<sup>17</sup> STEAM report, Global Tourism Solutions (UK) Ltd, 2016

<sup>18</sup> See, for example, Invest Herefordshire: Herefordshire’s Economic Vision (2017); STEAM report referenced by the Broad Street Development Group, April 2017

In 2014, an independent analysis of the economic impact of museums in Herefordshire was made by applying the county's Economic Tool Kit. This indicated that every £1 spent on the service generated £8.24 in the local economy: a return of 740%.

In common with most UK destinations, most tourist trips are made over the summer months (June to September) with additional numbers over the Christmas and Easter periods, and most (perhaps around 75%) are generated by a desire to engage with the history, heritage or the more general culture of the place, again a generally-recognised feature of inland destinations.

So ... where do these 7 million people go in Herefordshire ... and what do they do?

Clearly, they don't go to the recognised museums run by the council's museum service or others in their present locations. For example, Bulmer's Cider Museum attracts, in a good year, 10,000 paying visitors; the Cathedral attracts around 30,000 paying visitors a year to its *Mappa Mundi* exhibition; and the Waterworks Museum, at best, 2,000. The museum and gallery in Broad Street receives less than 10,000 (free entry), although the 'asbestos issue' was a problem last year causing the building to close temporarily.

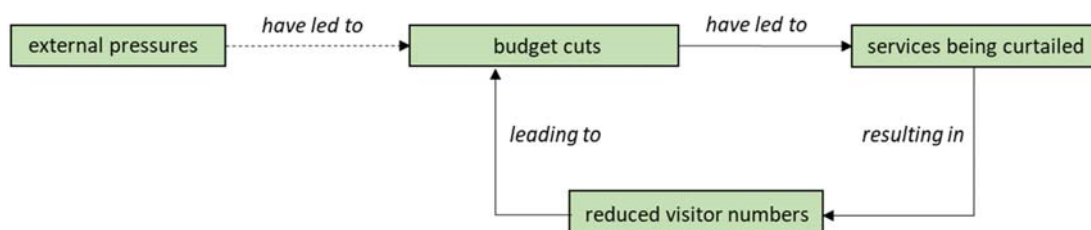
There is thus either a casual disregard amongst the population of the UK and other visitors for the heritage of Hereford and its county – which is doubtful – or, more likely, that they cannot go somewhere – anywhere – to see it in an interpreted environment. In effect, the resources are lacking.

This latter observation is supported by recent figures.

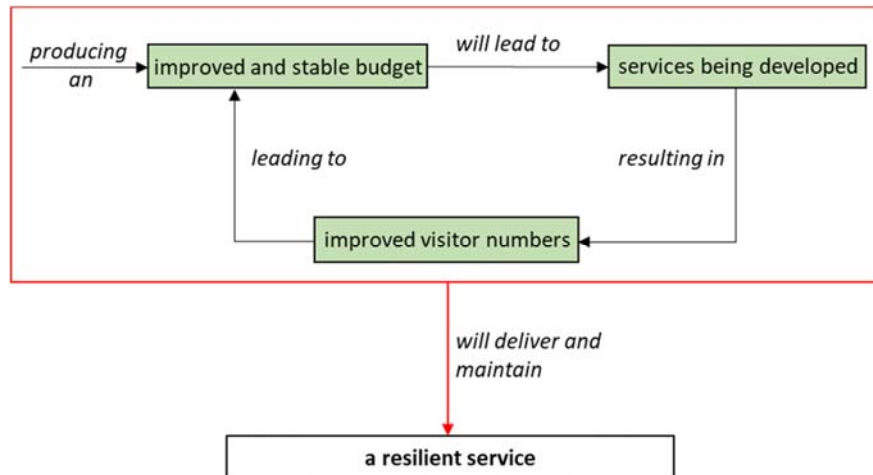
Just four years ago (In 2012-2013) the museum service recorded a total of nearly 140,000 visitors to its outlets including the Museum and Art Gallery (29,000), the Old House (35,000), and the heritage centres in Ledbury (29,000) and Ross-on-Wye (40,000).

However other, difficult-to-quantify, factors may also well be at work here such as competition from other leisure activities such as recreational shopping, cinema-visiting and eating out, as well as the fast-growing demand from in-home leisure activities such as streaming, gaming and spending time on social media.

The fact that visitor numbers to the service are falling can, in part, be explained by a self-reinforcing model created and sustained by the increasing financial pressures felt by councils all over the country:



A key issue is how to reverse this trend by creating a resilient service based on an improved and stable budget that will enable services to be developed and implemented resulting in enhanced visitor numbers that themselves can contribute to the operational budget:



As an aside, 140,000 visitors a year represents a market penetration rate (mpr) of just less than 1% measured over 7 million people. These figures are broadly similar to those seen at Lancaster, Lincoln and similar-sized cities across England. 140,000 to 160,000 visits a year might therefore be seen to be a reasonable, long-term target.

As a potential comparator to Hereford, Chester and its environs (another Marcher town to the north and with a resident population of no more than 80,000 in the city itself and hence comparable to Hereford's 60,000) claimed 46 million visitors in 2014 with a total spend of around £2.5 billion<sup>19</sup>.

Based on these figures, the daily-return in Chester of around, very broadly, £50 per head is similar to that achieved by Hereford.

The question thus reverts to what Hereford can do to attract a larger number of visitors to its attractions from which a revitalised museum service can benefit and prosper.

Whilst concerns such as these are clearly outside the immediate scope of the current brief, they are nonetheless relevant because, eventually, targets will need to be set for any new facility or 'cultural hub' that may emerge in the future.

The council's museum and wider heritage sector will, no doubt, continue to do its best, but there needs to be a greater emphasis on the *county* as a destination to enable the service to attract people to its facilities when they are there.

<sup>19</sup> *The Chester Chronicle* quoting 'Marketing Cheshire' July 2015



## 1.5 SWOT analysis

In summary, Herefordshire museum service currently identifies with the following SWOT analysis:

Strengths	Weaknesses
Dedicated and able curatorial and front of house staff MRLC facilities Care of collections HMSSG/Hereford Library User Group 31 Broad Street Development Group Broad Street museum location Proximity to the cathedral/Mappa Mundi Rankin building presence B+W House museum Relationship with HLF	Inadequate staff resources for expected level of service Broad Street galleries are poorly located in the building with no direct on-street presence Limited public access to collections No 'icons' in collection Lack of a clearly-identified brand for the Museum Service Limited online presence Co-location with the library has led to limited exhibition space The cultural strategy has not been finalised No longer has a fully-integrated role in the wider strategic county museum network
Opportunities	Threats
Transfer to independent trust Partnering with other museums in county Partnering with national museums Partnering with NMiTE (national institution) Partnering with other local institutions Hereford BID initiative Rural Herefordshire destination plan Developing cultural strategy New brand and improved on-line presence Embedding museum services in community Development and realisation of vision HLF funding pathway Museum(s) of the Marches? (see later in this report)	Reduced based budget to not meet expectations of the service Morale of museum staff The long-term capacity of the current volunteer base Closure of Broad Street galleries Closure of Museum Service Repatriation of collections HLF funding clawback Loss of cultural identity Reduction in tourism generally Museum product not in-line with new trends and tastes Demand on people's leisure time from other activities

## 1.6 How we've got to where we are

In their early years, museums were created, in the UK at least, by high-net-worth individuals for the benefit of themselves, their immediate social circle and, eventually, the public at large, particularly after the Great Exhibition of 1851 and with it the rise of Victorian philanthropy<sup>20</sup>.

Their growth, at least in numbers, was given significant impetus by The Museums Act [1845] which gave local authorities the power to levy an additional rate for the creation and maintenance of

<sup>20</sup> The two oldest museums in the UK are the Ashmolean (University of Oxford) 1683, and the British Museum (1759). Source: Prince, D R et al 'The Manual of Curatorship: A Guide to Museum Practice' (Butterworths Scientific); 1<sup>st</sup> edition, 1984

museums in towns with more than 10,000 people<sup>21</sup>. In Hereford, the museum and its associated art gallery opened in 1874 inspired primarily by the work of the Woolhope Club (founded in 1851)<sup>22</sup> and the earlier Herefordshire Literary and Philosophical Society (founded in 1836).

After WW2, and particularly since the 1970s, a new wave of ‘independent’ museums emerged with more tourist-focused and income-generating remits outside public authority or central government control<sup>23</sup>. They took their place alongside a growing heritage-led tourism industry (which included site interpretation, visitor centres, field centres and environmental study centres) often managed by trusts, and/or charitable companies, many with underpinning financial support (especially in their early years) from government or regional development agencies.

Also during this period improved standards of visitor management and the technologies associated with new and developing methods of interpretation (particularly computer-generated and hands-on) were established and the new attractions – which depended to a large extent on income from admissions – were marketed with growing success.

The concept of a visitor or heritage centre, to act as the initial point of entry, or ‘gateway’, to an interpreted landscape, urban setting or historic or industrial site, also developed a separate identity during this period.

In retrospect, this can be seen as the heyday of museum creation, with capital funds provided particularly by the Heritage Lottery Fund<sup>24</sup>.

Many of the traditional assumptions of the role of museums and museum services – as places that ‘enable people to explore collections for inspiration, learning and enjoyment ... (and) which they hold in trust for society’<sup>25</sup> are now being challenged to move away from this object-focused approach to one where the needs of the public take precedence.

As a result of the on-going cuts to local government funding, museums (as non-statutory services<sup>26</sup>) are increasingly being viewed by many as being contributors to the wider economic (particularly tourism-led) offer of a city, or place, to justify their existence.

Museums have thus moved from being places where objects are stored and researched by academics, through their use in public education and leisure to entities that can, in and of themselves, generate economic value.

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<sup>21</sup> The Museum Act [1845] was originated by Chartist Movement as part of its demands for reform in education. Hijacked by Messrs William Ewart MP and Joseph Botherton MP, the Act became a way of creating places that were “instructive to the community ... (so that they) ... might draw off a number of those who now frequent public houses ...”

<sup>22</sup> Founded in 1851, the Woolhope Naturalists' Field Club (or simply the Woolhope Club) is a local learned society devoted to the study of the natural history, geology, archaeology and history of Herefordshire.

<sup>23</sup> For example, the Association of Independent Museums was established in 1977. Source: Prince, D R et al ‘The Manual of Curatorship: A Guide to Museum Practice’ (Butterworths Scientific); 1<sup>st</sup> edition, 1984

<sup>24</sup> The Heritage Lottery Fund (HLF) was established under the National Lottery (etc) Act [1993], and received its first application a year later. Since then it has awarded over m£2 billion in grants, many for Listed buildings and museum collections.

<sup>25</sup> The Museums Association’s 1998 definition, and still current. Source: Museums Association Website, accessed September, 2016.

<sup>26</sup> As defined under the Public Libraries and Museums Act [1964].

One manifestation of this trend is where museums appear in local authority management structures. At one time stand-alone entities managed by chief officers (especially in the larger local authorities), museums were first absorbed by education departments, then moved to leisure departments/cultural services and are now increasingly being overseen by departments of regeneration and economic development<sup>27</sup>.

This is not surprising.

In cities where age-old industries have either disappeared or have been taken over by international concerns<sup>28</sup>, where town centres are dominated by chain-stores and their associated brands and where a social-media-savvy population is no longer rooted in its immediate neighbourhood, museums have an increasingly important role to play in underpinning local identity and worth and in thus contributing to the overall well-being of a place.

The four main groupings of museums in the UK now appear to be evolving in four distinct directions:

National museums	Major tourist attractions and academic institutions
University museums	Part of the infrastructure of increasingly market-led organisations
Independent museums	Tourist attractions
Local authority museums	Engines of economic activity and well-being on a place-wide basis

Moreover, through outreach programmes, the creation of satellite facilities and the offer of touring exhibitions, the future of museums is not one of simply operating out of fixed locations exhibiting permanent collections along purely educational lines: the best – and Herefordshire should aspire to be the best – use all forms of media, some in ‘found’ or ‘pop-up’ spaces, to deliver their messages to their public, both local and tourist.

Whilst all this implies that some form of head-quarters operation is needed, it does not mean that this is solely where the museum offer occurs, far from it. And, in the MRLC, Herefordshire already has such a place immediately to hand.

Museums are thus far more than places to visit and places to enjoy – they are also facilities that can be used, for example, to assist one the greatest challenges of 21C Britain: ageing and mental health<sup>29</sup>.

For instance, *The National Alliance for Museums, Health and Wellbeing* based at University College London<sup>30</sup>, has recently appointed a coordinator to develop the work of museums and the use of museum objects in helping to treat psychological issues, particularly those associated with age-related illnesses such as dementia. Such roles will no doubt increase over the years.

To be relevant, needed, supported and resilient, a modern museum service must serve all educational, social, cultural and political views simultaneously. It must recognise its past, but challenge it.

<sup>27</sup> For a history of the evolution of museum governance in the UK see, for example, Prince D R, *The Manual of Curatorship: A Guide to Museum Practice*. Butterworths: London. (Reprinted many times, latest 2011), especially Section 1.

<sup>28</sup> As is the case with HP Bulmer, one of Hereford’s defining agro-industries, now owned by Heineken in Amsterdam.

<sup>29</sup> Currently, over 20 million of the UK population are aged 50 years and over. More than a million people are aged 85 or over. More than 11 million are over retirement age (65 for men and 60 for women). This is 18.5% of the total UK population and is set to be over 20% by 2020.

<sup>30</sup> In the Faculty of Social and Historical Sciences, University College London, within which David Prince is a Visiting Professor.

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It must – and this is what makes it unique – use real objects to focus discussion on contemporary issues that help to set the agenda for debate. In essence, it must continually address contemporary issues from an historic perspective.

It is clear that as the world is increasingly being viewed through the commercially-generated digital filters of the so-called ‘social networks’ (Google, Facebook, Instagram, WhatsApp etc) and influenced by (indeed carrying) fake news and immediate responses (Twitter) the vain hope is that the desire for real news, real information and real objects will remain.

Hence, in a world in which *all* information, *all* ideas and *any* philosophy (no matter how deranged) is immediately afforded status by the number of its ‘followers’, it is vital that museums – as guardians of both objects and their associated information – continue to research and to deploy well-considered, well-articulated and well-researched arguments through all the channels available to them.

Digital media is, indeed, highly relevant and needed in the museum sector but, like all media, it can be subverted, exploited and manipulated.

## 1.7 Caring for the collections

One of the most profound effects of the financial pressures on museum services throughout the UK has been that funds have been lacking for the effective care of collections, especially in purpose-built, environmentally and physically secure stores, or centres, to which public access is offered.

Many collections up and down the country are stored in poor climatic conditions which put them at long-term risk, lack immediate physical access, even for curatorial oversight, and offer severely limited public access.

This has meant that new or revitalised services have often had to carry the additional financial burden of creating such facilities before attention can turn to creating places for public access by way of permanent and special exhibitions and the like. Often, the creation of such collections care facilities has added at least 33% to the overall capital requirement of a new museum project<sup>31</sup>.

It is thus of considerable benefit to the future of the service to note that this is **NOT** the case in Herefordshire where the MRLC (originated in 2003) received a final grant of £1.22 million from the HLF to complete the Phase 3 works, and hence the facility as a whole, in 2008. These monies were supported by a considerable financial investment from the Council.

The well-maintained, documented and conserved collections in the MRLC are thus a firm foundation on which the revitalised service can, and should, build.

And this is significant in another, fundamental way.

Every generation looks to its past to make sense of its present and museum artefacts – the real things – are fundamentally important to this evolutionary process.

It is therefore not just that museums communicate contemporary meanings and associated images from the past through exhibitions, scholarly papers, lectures and the like ... it is more that – in a very real and tangible sense – they preserve that past for new understandings to be made and new futures to be imagined. They should therefore be in the vanguard of a place’s sense of its own worth.

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<sup>31</sup> As is the case on two of P+P’s city-based projects, the museum services of both Lincolnshire and Lancaster.

## 1.8 Principles for the way forward

To take all this forward, the service needs a combination of (a) a long term vision and (b) a strategy to keep it both afloat and viable until that vision is realised.

It thus needs an integrated plan for the short-, medium- and long-terms so that each can contribute to a resilient future on an incremental basis. Such an approach is elaborated by way of a four-Phase plan throughout the remainder of this report.

Much of the effort of others to date has focused on the long-term vision, and many have identified and produced plans for the redevelopment of the Museum and Library in Broad Street as a potential 'cultural hub' for the city.

Even if this is proved to be the case over the long term, the issue exercising thought at the moment is one of keeping the service alive until such a vision can be properly developed and delivered.

Of course, all this is recognised by the Council, its staff and supporters. Each and every member of staff interviewed for this study has visions and aspirations for a museum service that, collectively, could collate to make an active, vibrant and financially positive contribution to the economy of the county.

In addition, the Council has recently invested significantly in the excellent redisplay of the Black & White House in High Town which is now open to the public on a charged-for basis, as it was when it first opened to the public as a museum in 1918.

It should also be remembered that the service has an active, newly-formed support group (HMSSG) that can help aid its future, and among a number of other groups active in the culture/heritage area, HMSSG is the one that focuses on the sustenance and development of the Museum Service.

There is certainly no lack of goodwill to help develop of the service.

## 1.9 Soft market testing – museums, libraries and archives

As part of this process, on 7 November 2017 the Council issued a call for interested companies and other organisations to, essentially, express an interest in running all or elements of the museum, library and archive services (MLA) which are currently operated by Herefordshire Council. The response date was set for 4 January 2018.

This exercise, undertaken separately but in parallel with the current resilience study, is intended to allow interested organisations with appropriate experience to outline their views and ideas about the future provision of these services in ways that will enable the Council to assess if there is an appetite to transfer the service(s) to an external organisation(s), and thus to assist it in its general decision-making.

Underpinning the release of these soft test documents is the notion that bodies other than the Council might, or could, be better placed and/or better resourced, to deliver the services to the people of Herefordshire. The ultimate aim in the eyes of the Council is that these services are to be self-financing and independent from Council investment as much as possible.

The council, along with other local authorities, has changed significantly over the last years by having to focus resources on meeting its statutory obligations for caring for the most vulnerable people in

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the community, namely the social care of adults and children. There is also a focus on economic vitality that in turn creates resources for essential services – especially as local authorities are required to move to depending on income raised by council tax and business rates rather than any government grant.

Therefore, whilst changes to the museum service are down to money (or lack of it) coupled with the recognition that the services themselves have changed significantly over the last half-decade, the question remains as to whether the council itself is best-placed to deliver the service long-term

Hence, underpinning the release of these soft test documents is the notion that bodies other than the Council might, or could, be better placed and/or better resourced, to deliver the services to the people of Herefordshire. The ultimate aim in the eyes of the Council is that these services are to be self-financing and independent from Council investment as much as possible.

There can be no doubt that the Council has made significant and recent investments in a number of key sites including the new library at the Masters House in Ledbury, a purpose-built archives centre at HARC in Hereford, the major refurbishment of Hereford Library, and the redisplay and branding of the Black & White House.

Whilst acknowledging the headline value of these services and their associated facilities to the economic, community and general well-being of the county, the Council recognises that – all things being considered – it must now plan for a scaling down of its own available resources, particularly in the library and museum sectors, with the ultimate, stated aim of these services being self-financing and independent from Herefordshire Council investment as much as possible.

In P+P's view, and it is only a view, the anticipated return from this process is likely to be that the museum service is the one that will attract the greatest attention, followed by the libraries and archives in equal measure.

We say this because the museum service – through the exhibitions and other activities and forward-looking partnerships it can create all across the county – has the greatest potential for earning external income.

Whilst all three services have seen their operating budgets reduced, museums would appear to be best placed to generate significant and sustained income from offering services county-wide and in attracting visitors to potentially new venues.

It must be said that none of this reflects on the Council, its staff or the way it has strived, and continues to strive, in an atmosphere of unprecedented financial constraint.

## 2.0 Governing museums

Museums in the UK are delivered by a range of governing authorities from the boards of trustees at the nationals, government departments (such as the MoD), local authorities, independent trusts and charities, groups of unincorporated individuals and so on.

For Herefordshire Museum Service, the issue is one of remaining within the Local Authority or spinning-out into some form of third-party (probably charitable) organisation.

The primary advantage of operating the museum service under a form of self-governing trust or similar vehicle is in its potential for long-term planning, characterised by the following six elements. The governing body of an independent museum service should:

- Wholeheartedly believe in, and be prepared to work for, the service's best interests
- Be free from local politics, but capable of exerting political influence when necessary
- Appreciate the vital importance of high quality, well-motivated staff
- Recognise that staff need academic and entrepreneurial freedom to perform creatively and effectively
- Be flexible in its response to changing circumstances to enable the service to adapt and evolve
- Be subject to a statutory guarantee of the inalienability of the service's collections.

The responsibilities of the governing body are to:

- Provide a framework of plans and policies that define the service's purpose, monitor achievement of these objectives, and to communicate these to all who work for the service and to external stakeholders
- Act as an advocate for the service within the community and elsewhere
- Provide for the safety, security and preservation of the collections
- Secure adequate resources to enable the service to carry out its work, and ensure that these are managed effectively and efficiently
- Ensure the service serves the public
- Ensure the service's financial stability.

In discharging these responsibilities, the governing body has four key roles:

- Ensuring a balance between benefits for present and future generations
- Maintaining goals consistent with financial resources
- Matching sources of funds with their uses
- Providing a sustainable and resilient organisation.

The emphasis is therefore on:

- Accountability (the monitoring of performance and incentives for good performance)
- The separation of strategy from delivery, and a focus on management rather than policy
- An inclination to introduce market mechanisms for delivery, including competition and contracting-out
- Responsiveness to customer preferences
- The disaggregation of bureaucratic structures.

In most cases where a local authority devolves its museum service to a third party, the following characteristics emerge:

- The devolved body is usually a charity ('a museum trust') created especially to deliver museum services, with the intention of a long-term relationship between the council and the museum trust
- The collections may or may not be transferred to the trust
- All the council's museum responsibilities, including strategic planning, are transferred, not just day-to-day management responsibilities
- There is a sharing of risk between the council and the museum trust for a defined (handover or transition) period.

The issues stated below are generic and thus set the scene for the future in Herefordshire.

## 2.1 Precedents

Some sixty or so devolutions from local authorities have taken place in England and Wales over the last fifteen-odd years for museums and museum services of all sizes. Whilst the independent trust model is by far the most common, there are others:

- National museums (Merseyside County Museums became what is now National Museums Liverpool)
- Joint committees (such as those for Tyne and Wear Museums, the North of England Open Air Museum at Beamish, and for a number of the museums operated by the Hampshire County Museums Service)
- The private sector (eg, at Weymouth and Walsall)
- Outsourcing to an existing independent museum or heritage organisation (eg, West Park Museum at Macclesfield to Macclesfield Museum Trust, and Baysgarth House Museum in North Lincolnshire to Barton-on-Humber Community Heritage Arts and Media Partnership).

## 2.2 Reasons to transfer

Reasons for transfer are rarely couched in terms of the need to improve the service to the general public or to improve the service's efficiency and effectiveness. More common reasons are:

- To develop a newly-established museum service or capital project – while common in the 1980s and 90s, this is becoming increasingly less frequent
- As a response to funding difficulties within the local authority – increasingly the most common
- As an outcome of a reviews by the local authority or commissions – as above
- As a consequence of moves to rationalise a service's branch museums or to combine the museums with other services.

Of the above, items 2 (as a response to funding difficulties) and 4 (a consequence of moves to rationalise the service) appear to apply to Herefordshire.



## 2.3 Advantages

The general advantages experienced by devolved museum trusts are generally reported to be:

- A greater sense of direction, freed from the wider corporate issues of local authorities, and the ability to focus on the core business
- Flexibilities and freedoms to establish plans and policies appropriate to the need of current and potential audiences as well as stakeholders
- Management structures that enable timely decisions to be made at the most appropriate operational level
- A sustainable framework, based on funding arrangements, that create a stable basis for long-term business planning and development
- The opportunity for changes in working practices (and staff realignment) in the service
- Opportunities to benefit from the financial advantages of charitable status and to increase income through commercial activity and sponsorship within the constraints of the Charities Act [2011, amended 2016]
- Opportunities to make new connections and freedom to develop new partnerships (both in the museum sector and outside) relevant to the service's core purpose
- A greater attractiveness to financial donors and to persons considering long-term collections loans.

## 2.4 Reasons not to change

Reasons not to change can be seen where:

- It was believed that other means, such as a revised partnering arrangement, would reignite the service
- The service was perceived to be 'working well', so there was no reason to change
- Principled hostility to spinning-out services
- Some stakeholders (eg, trades unions) may be opposed to what could be seen as being privatisation
- Devolution is perceived as 'selling the family silver'
- There was no substantial or immediate financial incentive to devolve
- Previous devolutions had led to financial or organisational difficulties impacting on the council
- Legal obstacles (such as ownership of the collections) made the devolution tricky or potentially too expensive
- There was no political or management impetus from within the local authority, coupled with the belief that such services should be provided by local government
- Changes in key personnel (whether political leadership or senior management) either stifled the process of change or reversed previous decisions for political reasons
- Either the council or the museum service claimed insufficient capacity or resources to undertake a comprehensive review or to manage the devolution process
- The vested interests of service staff who feared job losses or changed working arrangements, or council corporate staff who feared the impact of change on their operations.

## 2.5 Types of devolution

Where devolutions have occurred, they are of the following types:

- **Full** – where the museum/service is transferred as a going concern, with all its assets, to a newly-created recipient body (trust)
- **Hybrid** – where operational responsibility is devolved to a museum trust, together with defined assets, with others retained by the council (eg, staff remaining part of the council and seconded to the museum trust).

Historically, the most effective and efficient has been the first – full devolution.

Some museums and museum services have been transferred to more all-embracing ‘culture/leisure trusts’ which cover a wider range of cultural activities including libraries and archives which are often seen to be a good match with museums. While the benefits of a strategic approach to cultural policy may be attractive at first sight, whether there is sufficient advantage in translating this into operational arrangements needs to be considered on a case-by-case basis. It may well be a way for Hereford, but recommendations on this aspect is outside the scope of this report.

## 2.6 Summary of benefits and disbenefits

On a purely financial level, there are a number of advantages and disadvantages to a trust structure:

Potential benefits	Potential disbenefits
Ability to benefit from Gift Aid	Exposure to some, perhaps significant, VAT and pension liabilities
Scope for business rates relief	Initial establishment costs may be large, particularly through legal and accounting services
Able to employ staff on different terms and conditions aligned to private sector (although TUPE regulations will still apply)	Will (may) no longer have access to central services previously provided by council (for example, accounting, IT, HR) so unit running costs might be higher
Ability to raise additional income on charging which might not be acceptable from a local authority	Risk of any future trust not being able to make investment depending on scale and size
More time to spend on new projects, initiatives and fund-raising activities, given necessary resources	Not part of the democratic establishment and thus might trigger issues of transparency and accountability
The ability to benefit from other sources of external funding	
Longer-term planning and faster decision-making	
The ability to attract additional volunteers and helpers	

It must also be remembered that these benefits *will only apply* if the trust is set up correctly at the outset with an appropriate degree of both independence and funding.

If this proves not to be the case, or potential issues are not fully thought through before the transition, then the benefits can all too easily become problematic.

Experience has shown that, in general, the more independent the trust is from the Local Authority over the long-term, the greater the opportunity that the trust has to fulfil its potential. If management

Is restricted by day-to-day constraints and bureaucracy, this may well limit its ability to act in entrepreneurial ways and to pursue commercial opportunities.

But without the necessary financial support from the Local Authority, the new trust has a greater risk of failure. Hence, a transitional arrangement usually applies, the length of which is determined on a case-by-case basis.

## 2.7 A project champion?

The need for, and the role of, a 'project champion' is much-debated in charity circles.

Recent evidence published by the *International Journal of Cultural Studies* and reported on by *PR Week*<sup>32</sup>, suggests that the days of 'celebrity endorsement' may be over:

*"We weren't surprised by the findings of this research. We are already suffering from celebrity fatigue, and the truth is that most celebrities, bar perhaps the Hollywood A-list, don't have the commitment or access to make a real difference. A figurehead is no longer enough. So charities must rethink and learn to use ... modern media tools to engage and craft compelling campaigns that attract the emotion of the crowd. Those that understand how to create a social connection – on a small scale or a large one – that leads to the highest emotional reward will be the ones to conquer moving forward."*

If this is the case, it implies that people who can 'attract emotion' and 'create social connection' in the context of 'crafting compelling campaigns' are the most likely to benefit the charity over the long-term.

This would imply a strong local-to-place connection and profile and, above all, a demonstrable empathy for the work of the charity, in this case an outward-facing and progressive museum service.

Clearly, P+P does not have sufficient knowledge of the county to pin-point who such a person might be, but it is clear from looking at other successful museum-centred trusts that a local person with sufficient time, experience, connections and – above all – advocacy (particularly PR and media) skills would be of advantage to any emerging charity for the museum service.

To attract such a person needs the prospective charity to have developed (at least in outline):

- A clear and unambiguous vision for the long term
- Have in place *the prospect* of sufficient funds to deliver the vision
- Have the ability to achieve 'clean title' to the assets that it has, or will, control
- Have recognised and developed at least initial collaborative arrangements with local firms, agencies and like-minded organisations
- Have a positive relationship with local government to enable (in this case) the smooth transition of assets and resources over a defined period.

Hence, such tasks should be undertaken during the initial transition period and thus be part of the HLF-supported resilience phase.

<sup>32</sup> <http://www.prweek.com/article/1307305/expert-view-celebrity-endorsement-waste-time-charities>; 2017

### 3.0 Current net delegated budget projections & their implications

The net current operating and budgeted costs for the museum service are set out below as taken from the cabinet report of 10 March 2017.

Rows 1 through 6 set out the 2016-2017 budget (the last complete financial year) whilst rows 11 and 12 show the net-delegated-budget (column E, NDB) targets for the current year (row 11) and the following year (row 12).

	A	B	C	D	E	F
1	<b>2016-2017 Budget</b>	<b>Employee</b>	<b>Goods &amp;</b>			
2		<b>Costs *</b>	<b>Services</b>	<b>Income</b>	<b>NDB</b>	<b>CPC</b>
3	Broad Street Museum	22	2	0	24	36
4	MRLC	178	10	-3	185	71
5	Black & White House	22	2	-3	21	16
6	<b>Totals</b>	<b>222</b>	<b>14</b>	<b>-6</b>	<b>230</b>	<b>123</b>
7	all cells are £000					
8	* 6.2 fte staff (but see text below)					
9	NDB: net delegated budget					
10	CPC: centralised premises costs					
11	<b>NDB Target 2017-2018</b>				<b>140</b>	
12	<b>NDB Target 2018-2019</b>				<b>67</b>	

If achieved, the NDB target for 2018-2019 will result in a reduction in the base budget of £163,000 achieved through additional commercial income, staff savings and entry charges, or over 70% of the 2016-2017 budget<sup>33</sup>.

In discussions with the Council it has been made clear that this NDB figure of £67,000 has been fixed for the foreseeable future. It is therefore this figure that has been taken forward to Section 8 (the finance section) of this report. More income raised through visits to the Black & White House and other sources means investment back into the based budget for spend on the service.

The Council has decided on these reductions (a) in the light of falling visitor numbers at all three of its museums; the fact that (b) in common with other local authorities, it is facing severe financial pressure in its obligation to meet other needs of the county's residents; and (c) it has responded to the principal recommendations of the McGowan Review (February 2016) on the Council's museum and archive services<sup>34</sup>.

One immediate effect has been to reduce the fte staff for the museum service from 6.2 in 2016-2017 (row 8) to 4.81 now (measured over 8 people) who continue to work at all the three sites on as-planned or on as-needed basis.

The Council is aware of the possibilities of generating income to offset the overall costs of delivering the service (and hence in helping to reduce the NDB) through, for example, introducing admission charges at the revitalised Black & White House, increasing income potential from retail and

<sup>33</sup> It should be noted that the NDB of £67K for FY 2018-2019 includes projected income of £30K from the operation of the Black & White House as well as income from letting space and so on at the MRLC. The implications of this are picked up in Section 8 of this report.

<sup>34</sup> McGowan, H (2016) Review of Museum and Archive Services.

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merchandising, and engaging in relatively small-scale activities such as ‘pop-up’ exhibitions and other events such as tours, schools sessions and loaning resources.

In combination, such policies could either (a) contribute to the on-going decline in measured visitor numbers (for example, by charging at the Black & White House); (b) take a relatively long time to develop and deliver (such as the merchandising option); but could (c) strive to maintain a Council-run museum operation in the short term and in the mind of the public.

Whichever way it is looked at, the underpinning position is that the museum service is in a difficult position unless and until (a) a method is found that enables it to continue to engage with as wide a public as possible over the short- and medium-terms, whilst (b) striving to deliver a long-term vision, perhaps revolving around the notion of a ‘cultural hub’ in Broad Street or elsewhere in the city, maybe in association with NMiTE.

It is also essential for the service’s future that its current staff are retained as far as possible so that their professional expertise is immediately available to implement any development programme or project in the short-to-medium term and also so that succession-planning can be started.

The work of the service and other cultural activities in the city and its county also have the considerable benefit of being supported by members of the public through Friends and other groups, such as the 31 Broad Street Development Group, whose goodwill and determination are recognised and could thus contribute much to the emerging options.

Moreover, the vast majority of the recent consultancy reports and other documents that have been reviewed as background to this report all underline the richness of Herefordshire’s history as represented by the architecture of its city’s historic core (particularly the cathedral and its immediate townscape), its wider, predominantly rural and agricultural landscapes, its ecology and its social history.

But that’s not the main point ... keeping the service alive and vibrant until a long-term vision can be realised is.

## 4.0 Decision-tree modelling: an options appraisal

In taking a considered, balanced view of the future operation of the museum service a simple, linear decision-tree model was developed and tested with the benefit of the analysis of the background research, the outcome of the workshop and the comments of all those consulted. Such a model assigns judgements to decisions or projections as they are made and, as decisions follow from previous projections, a cascade of outcomes and their implications necessarily follows. Because the model is item-dependent (in as much as a change in one can have a large effect on the others through the resulting cascade) there are no absolutes. And, of course, the proposed changes are assessed against the overriding criterion of making the revived museum service a flexible, outward-facing concern that adds value to each and every visit whilst also making a positive contribution to the social and economic well-being of Herefordshire.

All models need inputs and all models produce outputs. Therefore, to produce a usable, sustainable model the application of professional judgement is critical to the inputs which are, in and of themselves, available for criticism and comment.

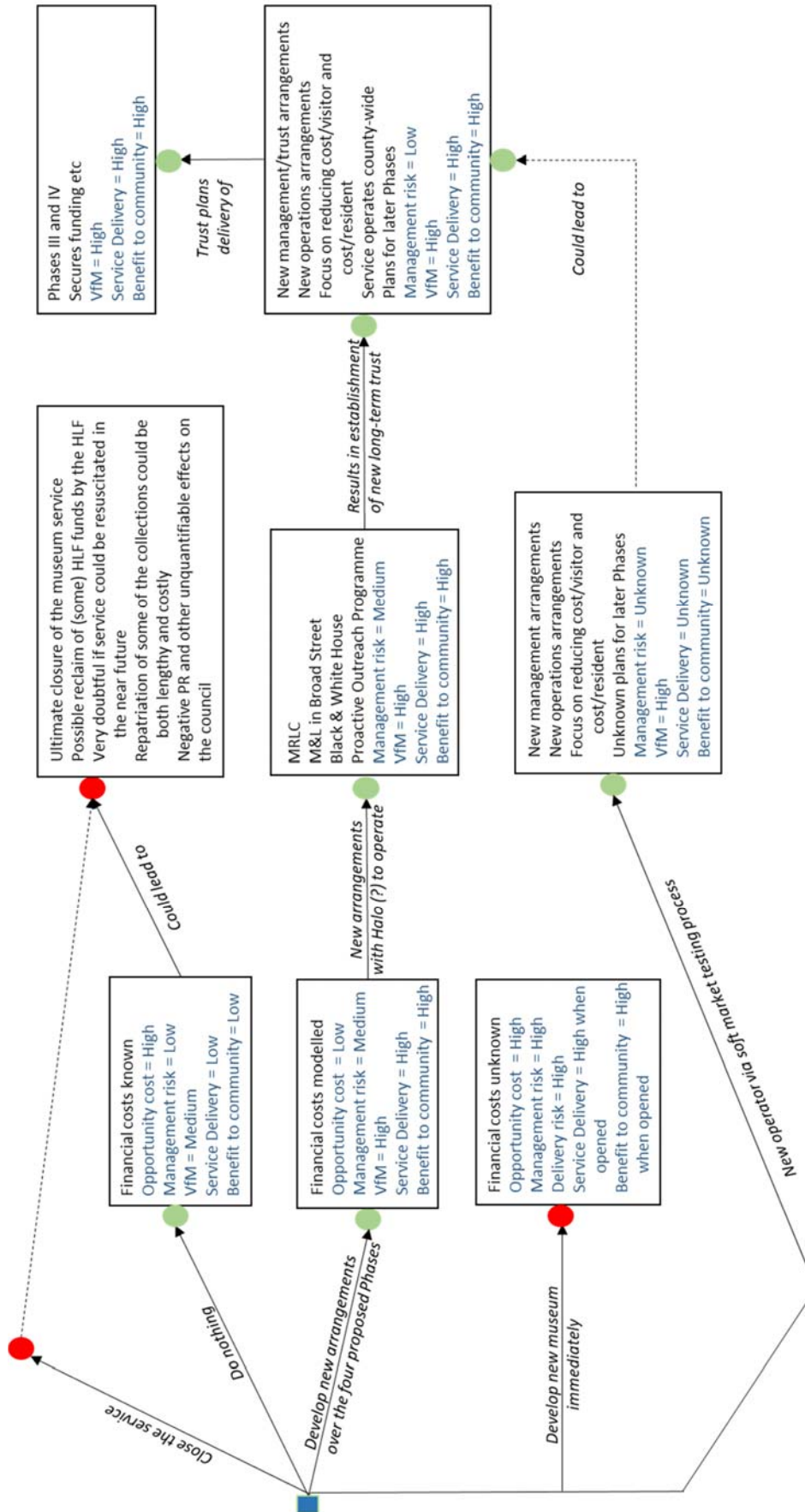
### 4.1 The options described and evaluated

At present the Council has five primary options available to it for the museum service:

- A** Close the service
- B** To retain the service at its current level ('do nothing')
- C** Actively look to secure a sustainable future by devolving the service to, say, a newly-formed trust established specifically for the purpose of developing a new museum building immediately
- D** Seek to devolve the operation to an existing organisation by way of a soft marketing exercise
- E** Seek a series of incremental measures that, whilst aiming to secure its long-term future via an independent trust, is conscious of need for managing risk under manageable financial and governance arrangements.

Based on a thorough review of the evidence, the resulting decision-tree model is shown overpage, from which the following observations can be made:

- A** Would have repercussions, not just politically and in terms of PR, but because the HLF *could* make a claim on the Council for the return of at least part of its £2m+ investment in the MRLC in Friars Street, whilst the controlled dispersal and/or repatriation the service's collections could bring with it significant legal and other costs
- B** Carrying on with the existing arrangements generating income specifically through the Black & White House to sustain the service but would be extremely difficult due to lack of assured long-term funding
- C** This is the long-term, grand-scale vision of a new museum in the city that is just that: long-term, grand-scale and visionary
- D** This process is underway
- E** Looking to create an imaginative and incrementally-staged evolution of the service offers the best way forward in terms of risk management and the best-use of limited financial and other resources, and is therefore the recommended option.



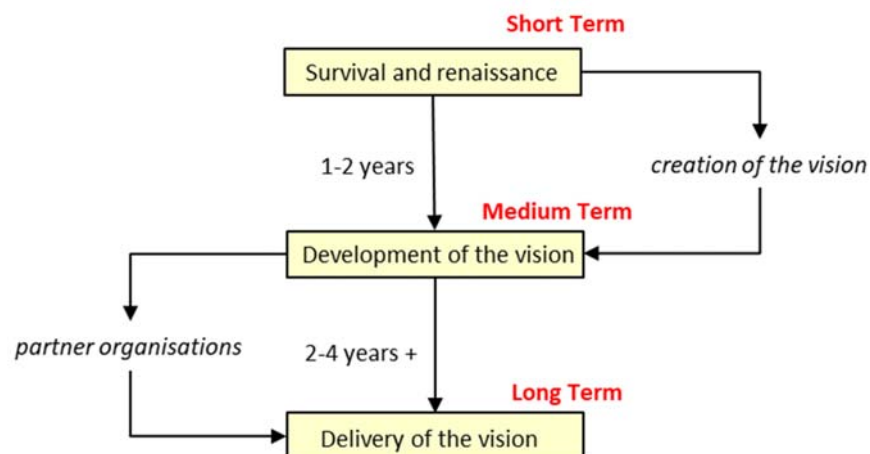
The primary objectives of any resilience study are to minimise opportunity cost, manage all identifiable risks, enhance value-for-money, and deliver a better, sustainable and future-proofed service for the benefit of all.

Thus, the model shown above suggests that new arrangements with a third party, or parties, are needed as a matter of urgency to consolidate the current position and lead, ultimately, to growth both at the MRLC and throughout the county, perhaps using non-traditional museum outlets at the outset.

Whilst this could no doubt be achieved via the soft marketing process, the recommended, incremental approach would set the essential underpinnings for a new trust to manage, long-term, future arrangements including the possible redevelopment of (say) the Museum and Library in Broad Street or another location as the permanent, long-term venue to become the public face of the service countywide in partnership with a number of key organisations currently operating in both the city and county.

We believe this model will provide a resilient museum service which does justice to both the collections and to Herefordshire.

In the diagram below it is proposed that the service needs to create and develop a vision of how it wishes to operate over the long term. Over this period the service needs to be supported by the Council at an appropriate level and also needs to bring in third party support.



This process should be led by the current staff as it is they who know the collections intimately and have undertaken many exhibitions in the county in the past. Their continued experience and expertise is vital. Thus, the vision needs to be developed by the staff of the service with support from external bodies as appropriate.

There is no doubt that the museum service, to be successful in the long term, needs to engage with partner organisations in both local and national contexts.

When the trust is formed, up-and-running and ready to take on the challenge, its first task should be to develop the vision by way of delivering an end-product which may well be focused on the creation of a new gallery and exhibition space possibly at the existing location in Broad Street or at alternative locations in the city centre.



This phased development is indicated in the following notional programme:

Financial Year	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Project Year	1	2	3	4	5	6
Phase I						
Phase II						
Phase III						
Phase IV						
Phase I	Transition period	Service managed as a subsidiary of Host				
Phase II				New trust is formed		
Phase III				Long term vision is created by the new trust		
Phase IV				Vision is delivered by the trust and its partners		

## 4.2 Purpose and vision

Herefordshire Council has recently developed strategic plans for each of its museum, library and archive services<sup>35</sup>.

In its ‘Museum Plan 2017-2020’ the Council is looking to the service to ...

*... “connect people with Herefordshire’s past by creating opportunities for direct engagement with museum objects for exploration, enjoyment, curiosity and wonder. The museum sites also have a role to play in generating tourism and pride of place for local people along with other museums and heritage attractions operating in the county independently of the council”.*

It goes on to say that ...

*“Herefordshire Museum Service Access Policy 2016-2019 outlines a vision that ... Herefordshire museum service aims to develop and deliver museum services that allow people the freedom to explore, enjoy and participate in their heritage in a way that respects and attempts to fulfil their particular needs and desires. Herefordshire Museum Service aims to create equality of access for everybody by minimising or eliminating barriers to access”.*

The Plan considers the likely impact of these proposals in various fields of the Council’s operation including healthy living, feeling safe and looking after children. Its primary delivery philosophy (there are others) is to ‘support a comprehensive volunteer workforce to assist in the care of the collections and the operation of the sites to aid customer experience’. Such a plan is designed to address the current financial reality.

There are three key elements to this vision: (a) collecting and caring for objects and their stories reflecting Herefordshire life, past, present and future; (b) enabling lifelong use, learning and enjoyment of the museum collections through interpreting and sharing expertise and knowledge; and (c) fostering a sense of place and community and promoting well-being.

The objectives of the vision can thus be summarised as:

1. Care and access: provide access to collections as widely as possible, whilst ensuring the best standards and practice in collections care as possible
2. Sustainability: transform the museum service delivery model to enable continued provision of a sustainable and vibrant museum service for the county of Herefordshire, with an appropriately-skilled workforce and supported by partner organisations

<sup>35</sup> These are set out in Appendix 2 of this report.

3. Income: develop income generation systems that create a resilient financial base to support the museum service and its activities
4. Engagement: deliver engaging experiences, displays and activities with high levels of customer care
5. Collections: ensure the collections are relevant to Herefordshire and include a programme of digital documentation.

The realisation of these objectives will create a service that:

- Is a visionary major destination, key to tourism provision
- Is a hub of culture, history and heritage
- Attracts and exhibits national and international exhibitions
- Supports a wide range of offers
- Showcases and empowers local industry, crafts, endeavour and spirit
- Is the pride of Herefordshire.

Creating a major visitor destination in the cultural heart of Hereford which maximises public access to the collections, accommodates touring exhibitions, showcases local achievement and is a source of genuine local pride, may well be an achievable, long-term goal given an appropriate level of capital investment and revenue support.

In order to be successful in securing such funding, the vision must be developed and clearly articulated through a facilitated process of stakeholder and community engagement and ultimately must reflect those values and criteria identified by the key funding agencies. These are outlined in the following section of this report.

The HLF bidding process is extremely competitive, with more projects looking for support than there is money available. It is therefore essential that any proposal put forward is financially watertight, with robust plans in place both for the initial capital phase and future sustainability.

The service's staff also envisages a museum service that is embedded in:

- The community
- The health and well-being of the people
- The growth and development of young people
- The school curriculum and the provision of learning for life
- College and university provision
- The heart of business, organisations and economic growth.

This will require the service to undergo a process of organisational change with collaborative work becoming a core activity, building sustainable partnerships with communities and involving them in decision-making. In so doing, the service will need to understand and respond to a wide range of local community needs and values.

The community must be encouraged to actively and regularly participate and collaborate in dialogue and decision making about the work of the museum service. At the same time, the service must play an effective role in developing skills, capabilities and creativity preparing and helping people to become engaged, to find employment or volunteering opportunities in the broader heritage sector and elsewhere, and in supporting staff to learn how to work with particular communities.

In so doing, the service must adopt reflective practices to ensure ongoing dialogue and remain responsive to alternative values and working methods.

### 4.3 Funding criteria

Improving public access to collections has long been a key criterion for the award of capital funding to museums by agencies such as the Heritage Lottery Fund (HLF). Recently, the requirements for success have become more stringent with the need to demonstrate increasing benefit to all sectors of the community. The vision for the future museum service must therefore comply with the following criteria for outcomes if it is to be successful in attracting capital funding through this agency.

The HLF states that, with HLF investment ...

... heritage will be:

- Better managed
- In better condition
- Better interpreted and explained
- Identified/recorded.

... people will have:

- Developed skills learnt about heritage
- Changed their attitudes and/or behaviour
- Had an enjoyable experience
- Volunteered time.

... for communities:

- Negative environmental impacts will be reduced
- More people and a wider range of people will have engaged with heritage
- Your local area/community will be a better place to live, work or visit
- Your local economy will be boosted
- Your organisation will be more resilient.

As a minimum, the HLF expects projects to achieve the following:

- For projects requesting less than £2 million: one outcome for heritage, one outcome for people and one outcome for communities
- For projects requesting £2 million or more: more than one outcome for heritage, more than one outcome for people and more than one outcome for communities

Partnering with other museums as well as organisations and institutions in other fields of education and communication with complementary skills and expertise, can not only extend the outreach of the museum service but embed it in the community.

Being interconnected in this way will enable a cultural environment to develop in which resources and knowledge are shared, technology and innovation are embraced for mutual benefit and that of society as a whole.

Specific partnering opportunities are reviewed in the following section.

## 5.0 Partnering

P+P was engaged to produce a valid and reliable consultancy report on the future resilience of the museum service and, in so-doing, to make recommendations on the way forward for the service over the short, medium and long terms.

In pursuit of this we have sought and uncovered a number of potentially highly-significant partnership opportunities from which the museum service could benefit. Indeed they are likely to be instrumental to the sustainability and development of the service.

Whilst some of these opportunities may well have been recognised previously, the key with our work has been to focus on them to produce a coherent and potentially viable end product.

In overview, there is no lack of support for the service, including from some highly significant county-wide organisations. The issue is how this potential support can be harnessed to the service's best advantage by way of activities and funding as it plans its future.

### 5.1 Museums, libraries and archives

At first glance museums, libraries and archives would appear to be good bed-fellows, and were once linked together, in England at least, by the now-defunct Museums, Libraries and Archives Council (MLA). The present government recognises this by bundling the lot under the Department of Digital, Culture, Media and Sport (DCMS).

Earlier this year, the Local Government Association (LGA) was commissioned by the Council to review its Museum, Library and Archive service, and came to the conclusion that:

*"It may be the time for the elements of the service to be combined into a single unified service under the one management structure ... Staff can learn from each other and reflect the government department structure. A new structure could provide a saving on management rather the frontline services ... The combination of services may be more attractive to external organisations to manage and will lend itself to trust development or other external service delivery options<sup>36</sup>*

In P+Ps view, although there is indeed connection between services, all three institutions have different objectives, reasons for existence and possible futures and have often be brought together by expediency rather than need.

Of the three, museums and archives would appear, on the surface, to have more in common than each, or both, has with public lending libraries in that they deal with real objects, real records and unique remnants.

Moreover, both museums and archives have long reaches: a student of the geological evolution of Herefordshire may well visit the museum to seek out a particular trilobite; a researcher on the Civil War may well wish to see, first hand, the records of the Parliamentary General Sir William Waller and his successful capture of Hereford in April 1643.

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<sup>36</sup> LGA Peer Review of Museums, Libraries and Archives (2017)

A public lending library, important to the well-being of society as it is, is just that: it exists to serve a primarily local public with books and other materials that are, by and large, mass-produced and hence in many ways available to all and from many different locations and in various ways.

Whilst all are part of the ‘cultural offer’ of a place, along with theatres, dance studios, religious buildings, media outlets, universities, learned societies and poetry groups, it does not mean they need to be located in the same place, or respond to the same audience. Because they *can* be grouped together does not mean that they should – each has its own intrinsic worth, its own markets and its own allegiances.

Indeed, the trend has been set at the level of the great institutions: the British Museum (founded in 1753) no longer houses the British Library (spun off in 1972) nor is it now formally associated with the National Archives (2003).

Moreover, each institution has different audiences.

A lending library has a rapid turnover of local people using their membership to seek out new (or old) books. A museum’s market (excluding special and temporary exhibitions) is more often than not non-local people seeking to understand the place they are in, what makes it special and so on. Archives are, and no doubt will remain for the foreseeable future, the domain of those researching history be it their family tree or a specialised interest.

All have merit and all are needed.

The argument here is that Hereford’s museum service, given a fair wind and the up-front support it needs, *could* develop into a stand-alone business of benefit to the county without the need of it becoming part of a larger, more all-embracing service.

Indeed, of the three services (museums, libraries and archives) the easiest to spin-out is museums since they have the greatest potential for generating income long-term and are not governed by the requirement of providing a statutory service.

However, if such a long-term ‘MLA project’ came to pass in Herefordshire, the fact that if the museum service was, by then, a successful, stand-alone community-enterprise this, in and of itself, will not invalidate its ability to become part of such a larger and more all-embracing ‘MLA project/trust’, subject to the views of its (then) trustees and an assessment of the risks involved.

## 5.2 Independent museums in the county

In response to the Countries of Culture Inquiry from DCMS, the Friends of Herefordshire Museums and Arts noted the need for the museums sector to be part of a cultural strategy. This is acknowledged and endorsed by the following museums and heritage organisations in the county:

- Bromyard and District Local History Society (charity number 1051572)
- Coningsby Hospital (charity number 218679)
- Hereford Cider Museum Trust (charity number 1158061)
- Hereford Mappa Mundi Trust (charity number 703056)
- Kington Museum (charity number 511238)
- Leominster Museum CIO (charity number 1162600)
- Waterworks Museum - Hereford (charity number 515866).

It is perhaps significant that Herefordshire Museum Service is not currently part of this network.

In terms of the future resilience of the museum service it will be crucial to form or reinforce partnerships with the other museums and heritage groups in the county, in addition to the organisations identified elsewhere, so that a comprehensive cultural strategy, embedded in the community, can be developed collectively.

### 5.3 HerefordBID

HerefordBID is a not-for-profit business run by Hereford BID Limited as a private-sector-led entity run by a voluntary board which aims to develop and improve businesses and other outlets within its geographically-defined Business Improvement District (BID), which includes both The Museum and Library in Broad Street and the Black & White House properties currently managed by the museum service.

Established in 2015 and funded by its members and supporters, the organisation aims to reverse, as it sees it, the perception of the “gradual decline ... of Hereford’s consumer offer over that last twenty years”<sup>37</sup>.

The firm states that, as a place, Hereford ‘needs to look a whole lot smarter and offer a much better customer service so that visitors have a great experience and want to make regular, repeat visits’.

To do this they suggest five main areas of concern for which they plan to invest in total just over £1.4m over the coming five years:

- Increasing footfall (£0.27m)
- Improving the Hereford experience (£0.37m)
- Safety and security (£0.21m)
- Getting here, getting about (£0.13m)
- ‘Your bottom line’ (£0.05m).

Of these items, it is immediately apparent that the museum service can contribute directly to at least three of the above: increasing footfall, improving the experience, and getting there/getting about.

### 5.4 NMiTE

The New Model in Technology & Engineering (NMiTE), the first new university in the UK for thirty years, is a not-for-profit private university specialising in teaching a technology and engineering curriculum in the non-traditional format of applied engineering in the fields of defence, security and cyber, agri-technology, advanced manufacturing, and green and renewable technologies.

The university will occupy, over a period of time, a number of existing and new buildings in Hereford city centre with the former Shire Hall building in St Peter's Square becoming its administrative headquarters. Its first students, some 30, will arrive by September 2018, grow to 1,000 by 2022, and be on a pathway designed to achieve 5,000 by 2030.

Over the next few years NMiTE is planning to invest around £350m in funding its development, much allocated to the creation of new buildings and academic facilities, student halls and so forth.

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<sup>37</sup> Hereford Bid: Business Plan 2015-2020

Initial, very positive, discussions have been held with Prof Janusz Kozinski, NMiTE's inaugural President and CEO, over possible partnering arrangements with the museum service. As a university, NMiTE is highly committed to its future role in the wider cultural development of Herefordshire and sees the museum service as being a key player in the overall offer of the county. It is currently engaged in a master planning exercise of which the museums service should be a part and thus needs to engage as a matter of urgency. Indeed, it would seem to be appropriate for the Council to develop a separate, internal work-stream for such an engagement as of now.

This is because, subject to further progress, NMiTE would be willing to include a new museum development in its evolving masterplan, with the optimal arrangement being for the university to provide, on campus, a range of spaces for the display of museum exhibitions drawn from the service's collections at the MRLC as well as having the ability to accommodate national (Government Indemnity) touring exhibitions. An alternative might be the existing Museum and Library building on Broad Street which, if remodelled, could become a cultural resource for both the university and wider community.

If this proved to be the case, the MRLC in Friars Street would continue to be the headquarters of the museum service with the on-campus (or other) venue acting as a new, state-of-the-art exhibition facility.

In essence, NMiTE is looking to use the spaces it will create in multi-use ways. Thus, teaching spaces could become classrooms for the delivery of educational activities at the new museum, obviating the need for unnecessary overspend on physical resources.

From our initial discussions, NMiTE would be willing to consider at least part-funding the capital costs of a new museum space(s) in the understanding that an improved museum presence in the city would add to the university's overall offer to the students and staff it will need to attract in a highly competitive marketplace. This also fits well with its response to central government's stipulation that universities must, as far as possible, integrate into their local communities and provide joint-use facilities ... no more 'town and gown'.

Being physically associated with NMiTE would not diminish the museum service's ability to operate as a separate institution.

Many UK universities have museums associated closely with them, each of which maintains its own brand and connotations. Examples are the Petrie at University College London, the Ashmolean (Oxford), the Fitzwilliam (Cambridge), the Museum of English Rural Life (Reading), Palace Green (Durham), the Whitworth (Manchester) and the Hunterian (Glasgow)<sup>38</sup>.

Indeed, NMiTE could well become the partner 'national institution' with resources for coordinating the significant heritage offer and activity in the county.

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<sup>38</sup> In the UK the University Museums Group (UMG) Scotland) where they represent the interests of over 100 university museums to funders and stakeholders. They also maintain close links with the international body for university museums, UMAC. [Source: *Impact and Engagement: University Museums* actively campaigns for the university museum sector in association with its sister organisation UMIS (University Museums in *for the 21<sup>st</sup> century*. UMG/UMIS).

## 5.5 Other universities

The Museum University Partnership Initiative (MUPI), funded by Arts Council England's Museum Resilience Fund, was launched in West Midlands region in April 2017.

MUPI aims to develop cross-sector partnerships, exchange knowledge, and identify ways to work together in the future.

Since April 2017, the museum service has been developing partnerships with three universities: Wolverhampton, Birmingham and Warwick. In summary these are:

- **University of Wolverhampton, Faculty of Arts** – Dress & textiles network – including Hereford college of Arts, De Montfort University, contemporary dress and textile makers in the region, possible wider connections with Edinburgh and Iceland.
- **University of Birmingham, School of History and Cultures** – ‘Connecting collections’ – Investigating research projects linked to domestic interiors, David Garrick collections – links with the Shakespeare Birthplace Trust and the Erasmus Darwin Museum. Involves significant digital displays.
- **University of Birmingham, School of English Drama and American and Canadian Studies** – Meeting planned to investigate projects around the David Garrick collections, the Segments poetry group and other initiatives.
- **University of Warwick Engagement project**, and research development.
- **Cardiff University** Department of Archaeology and Conservation School of History, Archaeology and Religion. Partnership working since 2008. Museum objects are provided for MA Conservation students to undertake conservation and analysis projects, the project work is carried out under close tutor supervision. The projects have mostly involved ceramics, archaeological metals and some waterlogged leather.

It is anticipated that such partnering arrangements with these universities will be ongoing.

## 5.6 Universities and outreach

The Office for Fair Access (OFFA) is the independent regulator of fair access to higher education in England. Its principle task is to enable access to universities from people with as broad a background as possible.

As part of this process, it has charged universities with reaching out to the general public, not just in terms of the physical facilities they can provide but, more significantly, in terms of the courses, programmes and community-wide services they can, and indeed must, offer to continue to secure substantial central government funding. All universities are engaged in these activities, nearly all through dedicated, cross-faculty departments ... and NMIITE is unlikely to be an exception.

As just one example known well to the authors, University College London (under its inter-faculty ‘widening participation’ initiative) offers activities and events for, amongst others, Year 7-13 school children, adult learners, care leavers and school teachers. Activities range from one-day workshops, lectures and seminars led by senior academics, sustained engagement programmes and summer schools. As part of its ‘Breaking barriers, Crossing borders, Opening minds’ programme the full range of UCL’s museums, galleries, theatres, laboratories and teaching spaces come together in a



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programme called 'UCL Culture' aimed at opening up the university to all who are interested in its work.

One current, cross-faculty programme is entitled 'What It Means To Be Human' and runs for six months from October 2017 to March 2018 using over forty venues at its Bloomsbury campus as well as having a substantial, and legacy, digital presence<sup>39</sup>.

## 5.7 Herefordshire College of Arts

Herefordshire College of Arts (HCA) offers courses in both further and higher education fields, in Art & Design, Music and Performing Arts, to local, national and international students. The College has two campuses in Hereford at Folly Lane and the former Royal National College for the Blind building on College Road. The BA (Hons) Artist Blacksmithing Course is the only one of its kind in the UK, and is taught at the largest teaching forge in Europe.

The recent *Forge* exhibition was co-hosted by HCA and the museum service

It is anticipated that HCA could support the museum service, for example, in helping it connect to a younger audience and, say, providing a venue for temporary exhibitions and assisting with arts input etc. Also, ways that the museum's collections and curatorship might be used to support HCA programmes and activities should be investigated.

## 5.8 Rural Media

Rural Media is an award-winning, Hereford-based production company and charity of over twenty-five years' standing, producing award-winning films and digital arts projects with a national reputation for telling powerful stories from unheard voices and nurturing creative talent.

The firm has two branches. Rural Media Charity works with communities, schools, groups and individuals to create issue-driven films, heritage and digital arts projects that raise awareness, influence change and celebrate rural life. Rural Media Productions, the commercial arm, creates music videos, commercials, broadcast television and corporate films. Having worked with organisations such as the BBC, BFI, Channel 4, trusts and foundations, the Welsh Assembly, local authorities, the Hay Festival and more, they are constantly seeking to expand their portfolio.

Rural Media is proactive in the cultural development of Herefordshire. Its founder and CEO, Nic Millington, is a member of Herefordshire Cultural Partnership's (HCP) Strategic Board and chairs HCP's steering group which is responsible for overseeing the development of Herefordshire Cultural Strategy 2018-2028. It works closely with key stakeholders and investors including ACE, the BFI, HLF, Big Lottery Fund, Herefordshire Council, West Midlands-based universities, including Herefordshire's proposed NMiTE.

As a matter of policy, their projects are designed to have a long-lasting legacy in terms education, understanding, tolerance and cultural provision all of which chimes with a vibrant and forward-looking museum service.

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<sup>39</sup> UCL Culture: <https://medium.com/ucl-culture/>

In discussions, it is clear that considerable potential exists for the museum service to partner with Rural Media, with the latter acting as ‘strategic media partner’, not least in terms of technical advice on digital outreach, communications and marketing, including web-presence.

In addition, the ways in which the museum service might become involved in the Great Places<sup>40</sup> programme being run by Rural Media and how this might help it to become embedded in the wider community it seeks to serve is potentially fruitful ground, bearing in mind Rural Media’s track record of engaging with underrepresented and disadvantaged potential museum audiences across the county.

Furthermore, Great Places has specific heritage, health<sup>41</sup> and well-being strands aiming to support museums and heritage sites to become health and wellbeing hubs, all of which chimes well with the types of proposed developments suggested throughout this report.

It is vital that this initial, highly positive response from Rural Media is taken forward as an early and urgent task. The more partnerships with respected and well-rounded organisations the revitalised service can deliver, the better.

Thus, at this early stage, a potentially powerful relationship could be envisaged between a reinvigorated museum service, NMITE and Rural Media for the benefit of all concerned.

Rural Media’s potential help in creating and delivering a new brand for the museum service is also on the table.

## 5.9 Halo

Halo Leisure Trust and Social Enterprise (Halo Leisure Services Limited; Halo) was established in December 2001 as a private company limited by guarantee without share capital and which operates in the charitable sector by managing and operating leisure centres and their associated activities across twenty venues in Herefordshire, Wiltshire, Shropshire and the county borough of Bridgend in south Wales.

Turning over £14m in FY 2015-2016, of which 90% was generated by trading activities, and returning all its £1m profit to its operation by way of its status as a Social Enterprise Company, Halo has recently moved into the operation of libraries as well as its established leisure centre markets.

Over two million visits are made to Halo’s facilities each year (at a simple average of 100,000 per centre) and the business continues to invest in new facilities and outlets (£9m in FY 2015-2016).

As a business, Halo is focused on ‘creating healthier communities’ as its core mission: ‘Halo is about community health and we collaborate with GPs and local health organisations to deliver programmes to tackle head on the time bomb of heart disease, obesity and diabetes’.

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<sup>40</sup> <https://www.greatplacescheme.org.uk/>

<sup>41</sup> Herefordshire’s Director of Public Health has agreed to participate in the Great Place programme.

## 5.10 The Courtyard Trust

The Courtyard Trust, a charitable company limited by guarantee, operates the Courtyard Centre for the Arts and which was the first Lottery-funded, new-build arts venue in England, opening in September 1998.

It is a large, fully-accessible, purpose-built theatre and centre for the arts with a main auditorium seating up to 418 in a variety of flexible styles and a standing capacity of 460 (stalls) when flat-floored. The Courtyard also houses a studio theatre with a capacity of 130 (seated) or 220 (standing), a visual arts gallery with two additional gallery areas, a rehearsal room/dance studio, meeting rooms and a licensed café-bar. The theatre is well-served by modern backstage facilities and has its own dedicated car park.

The organisation is also home to a number of other professional arts organisations which include The Music Pool, 2Faced Dance Company, Dance Fest and Alloy Jewellers, who have a dedicated studio space from which a number of resident jewellers work.

The Courtyard has excelled financially in recent years, moving from a position where it required £350k annual revenue funding from the council, with continued support for operating the building, to generating a small surplus in 2016/17.

The current chair of the Courtyard Trust, Roger Morgan, is also Chair of the Herefordshire Cultural Partnership and has suggested that the Trust could be a development partner for the museum service.

There are a number of potential benefits that a closer association with the Courtyard could bring, including:

- The experience of successfully moving a local authority cultural entity into financial and governance independence
- A demonstrated interest and involvement in the wider arts and cultural sector
- Established local relationships and networks
- A successful trading arm and regional marketing experience
- A mixed offer of local and touring performances, nationally-distributed films etc
- A venue for pop-up or travelling exhibitions.

Other locally-based institutions that may be able to offer similar partnering opportunities include Herefordshire College of Art (see above) and the Cider Museum, the latter of which coordinates the cultural partnership of countywide museums.

## 5.11 A string of Marches museums?

Marches, or borderlands, served a political purpose, such as providing warning of military incursions and regulating cross-border trade. Consequently borderlands, which more often than not embrace dramatic landscapes and man-made fortifications, have particularly rich and often conflicting stories to tell.

The Welsh Marches refers to the parts of mainly Herefordshire and Shropshire bordering with Wales and forming a notional north-south axis linking towns such as Ross on Wye, Hay, Hereford, Leominster, Ludlow, Shrewsbury, Oswestry and Wrexham. This geographical dynamic suggests the possibility of museums in these and nearby towns partnering to relate different and complementary aspects of the

history and heritage of this dynamic region. This combined responsibility would generate a co-operative, mutually beneficial alliance of museums based on shared heritage and common economic goals.

The Marches LEP, with a responsibility for driving economic growth in the region, would no doubt have more than a passing interest in the prospect of developing a string of Marches museums and heritage centres to consolidate its tourism potential.

An obvious comparator is the borderland between England and Scotland delineated by Hadrian's Wall and the succession of museums and visitor centres, such as Housesteads, Chesters and Vindolanda extending along its 70 mile length. Declared a World Heritage Site in 1987, in 2005 it became part of the transnational 'Frontiers of the Roman Empire' World Heritage Site which also includes sites in Germany.

## 5.12 Wider arrangements

In any future development of the museum service, particularly over the long-term, partnering with other organisations – local, regional and – particularly – national and international – will be a key factor in sustainability.

As examples, the British Museum, the Tate, the National Gallery, the V&A and the Natural History Museum are all active in creating touring exhibitions and in working in close partnerships to assist both local and regional museum services; indeed they are required as part of their grant-in-aid so to do<sup>42</sup>.

There is, however, no science, no formula and no single road map to show the way. But essential clues from other successful museum services abound, and include:

- Formal partnerships with local-to-site universities
- Formal partnerships with internationally-recognised museums
- Formal partnerships with national funding agencies
- Creating family- and child-friendly spaces
- Being proactive and not being rooted in the ways museums *used to work*
- Becoming a central player in the future economic profile of the city
- Becoming a recognised and mainstream player in the life of the city ... *'I wonder what's on at the museum?' ... 'we should go' ...*
- Stepping out of traditional, object-based exhibitions into music, performance, plays, son et lumière ...
- Taking the museum, and its collections, out of the city and into new places, new areas: shopping centres, leisure centres, to places where people are and where they congregate naturally.

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<sup>42</sup> As a successful example, *The Collection* in Lincoln has formal, settled arrangements with, amongst others, the British Museum, the V&A, Arts Council England and the Art Fund as well as the local universities and trusts to provide exhibitions and management expertise in the delivery of local services.

As just one example known well to the authors as a result of their business planning and consultancy work on the project, *The Collection* in Lincoln (a similar-sized local authority service to Herefordshire) lists the following on its website's 'partners page'<sup>43</sup>:



<sup>43</sup> [www.thecollectionmuseum.com/about-us/our-partners-and-funders](http://www.thecollectionmuseum.com/about-us/our-partners-and-funders)

## 6.0 Comparators

A range of potential comparators for the emerging proposals for Herefordshire Museum Service exists up and down the country. The following are considered to have particular relevance to the current study<sup>44</sup>.

### 6.1 Derby Museums

Founded in 2012, Derby Museums is an independent charitable trust which is responsible for the rich cultural and creative history of Derby. It manages three sites across the city: the Museum and Art Gallery, Pickford's House and the Silk Mill, and holds and curates all the art and collections within them, including the world's largest collection of paintings by Joseph Wright of Derby.

The Trust's aim is to bring as many of the objects and treasures in the collections into the public domain as is practically possible and present them in ways that delight and inspire, via education and learning programmes, events and exhibitions, in order to share knowledge and inspire creativity and making amongst the people of Derby.

In 2015, Derby Museums received earmarked funding for a £9.38m bid from the Heritage Lottery Fund for the Derby Silk Mill – Museum of Making project. This project will sustainably redevelop Derby Silk Mill, site of the world's first factory and part of the UNESCO Derwent Valley Mills World Heritage Site, to create an inspirational new museum uniquely made in collaboration with people of Derby. The new museum will open in 2020.

Development funding of £817,300 has been awarded to help Derby Museums progress their plans to apply for the full grant at a later date. Derby Silk Mill – Museum of Making will be inspired by the makers of the past, made by the makers of today and empowering the makers of the future.

The full project costs are predicted to be £16.4m, £4m (25%) of which has been committed by Derby City Council.

The former industrial museum was taken over by Derby Museums Trust in 2012 following its mothballing in 2011. Since then Derby Museums has re-opened the building four days a week following a capital refurbishment of the ground floor supported by Derby City Council capital funding and strategic funding from Arts Council England.

This innovative refurbishment programme, entitled *Re:Make the Museum*, engaged local communities and partners in co-designing and co-making all of the aspects needed for the prototype museum of making, through volunteer programmes using on-site workshops and industry-standard equipment and techniques. Over 200 regular volunteers have contributed more than 8,000 hours to *Re:Make* and the co-production approaches that Derby Museums has developed led to the organisation's recent award of Major Partner Museum Status by Arts Council England, specifying a sector-leadership role for the organisation on a national stage.

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<sup>44</sup> It was suggested to P+P early in the research process that one or two of these might have been visited by the client and others during the study, but it is now unlikely that this will take place until the New Year at the earliest for reasons outside P+P's control.

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## 6.2 Wessex Museums Trust

In 2015, the Wessex Museums Partnership was awarded £473K from the Arts Council England Museum Resilience Fund.

In January 2017, the Wessex Museums Partnership formed the Wessex Museums Trust, a Charitable Incorporated Organisation (CIO). The Trust is chaired by Clare Conybeare and the current Trustees are the Directors/Managers of each of the four partner museums:

- Borough of Poole Museum Service
- Dorset County Museum (Dorchester)
- The Salisbury Museum
- Wiltshire Museum (Devizes).

In June 2017, the partnership successfully bid to become one of the Arts Council's National Portfolio Organisations from 2018, with a funding award of £1.278m. The funding award is for the period 1 April 2018 to 31 March 2022.

The four partner museums will receive £1.3m over four years from 2018 to support a range of innovative projects delivered by the partnership to enhance their collections and programming, including major exhibitions, digital collections initiatives and community learning and outreach programmes.

The Wessex Museums Trust will now begin a period of preparation for National Portfolio status from April 2018, and continue to deliver existing partnership work, including the successful Spotlight Loans programme, which sees objects from each museum tour across the partnership venues over the course 2017/2018.

By working together in these challenging times, the Partnership believes that it will be better equipped to achieve its ambitions. Becoming resilient organisations will be key to this, through the development of museum staff and governance, diversifying income and by making the most of common opportunities to improve the museums' offer and impact with audiences.

## 6.3 The Museum of English Rural Life

The Museum of English Rural Life (MERL) is owned and managed by the University of Reading. The museum occupies former university buildings close to Reading town centre and is open to the public all year round.

The Museum was awarded £1.8million from the Heritage Lottery Fund (HLF) in 2014 for the redevelopment of its galleries, which reopened in October 2016. The redevelopment strengthens and renews the museum's links with agriculture as well as enhancing its position in supporting engagement opportunities for students and academics across a wide variety of disciplines, nationally and internationally.

The museum service uses its diverse collection to explore how the skills and experiences of farmers and craftspeople, past and present, can help shape our lives now and into the future. Working alongside rural people, local communities and specialist researchers it creates displays and activities that engage with important debates about the future of food and the ongoing relevance of the countryside to all our lives.

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In challenging perceptions about rural England through the historical and contemporary relevance of country life and culture MERL has obvious parallels with Herefordshire Museum Service in its links with agriculture and a rural county. It is also a comparator in Herefordshire museum service's potential reciprocal relationship with NMITE, as a resource for students and staff and partnering with a national educational institution.

## **6.4 Slough Museum**

Owned and operated by Slough Borough Council since 1986, Slough Museum is an independent, accredited museum and registered charity. Its mission is to inspire, engage, and educate through imaginative and inclusive programming and displays exploring and celebrating Slough's past, present and future.

The Museum opened in 1986 and for more than 25 years has been committed to collecting, documenting, and preserving Slough's local heritage and ensuring Slough's rich history is made accessible to all.

The Museum forms an integral part of The Curve, Slough's new cultural hub, a new public building in the city centre housing the library, museum components, learning and exhibition spaces, a cafe and other Council services. The library spaces, on three floors, are populated by eight museum pods within which graphics and showcased objects relate eight individual themes.

The Curve is relevant in the context of the possible future creation of a cultural hub in Hereford city centre in which the library and museum services might be co-located, in shared space, along with other cultural resources. Although, it may have greater relevance to the museums service's immediate future, if that were to involve occupying space for mounting small exhibitions within leisure centres around the county.

## **6.5 Future engagement**

It will be important to anyone interested in becoming part of any proposed trust for the service in Herefordshire to have had at least the chance to talk through the positives and pitfalls of such an engagement with those who have gone through the process.

This applies to both staff and potential trustees.

Such engagement will be a necessary part of the trust's development and will be expected by, for example, the HLF as part of its potential – and proposed – involvement by way of a grant for resilience funding.



## 7.0 Possible implications for Herefordshire Museum Service

On balance, and taking into account the factors noted in the previous sections, it appears as though a way forward would be to transfer the operation of the museum service into a newly-formed charitable organisation (trust) which would take on a to-be-agreed set of assets as well as operational responsibility from the Council.

In England and Wales, to be a valid charity, the new organisation will need to demonstrate both a charitable purpose and a public benefit. Recognised and applicable charitable purposes are the relief of poverty, education, the promotion of religion and all other types of trust recognised by Law, which includes trusts for the benefit of animals and trusts for the benefit of a locality.

There is also the absolute requirement that the trust's purposes must benefit the public, or some section of the public, and not simply a group of private individuals. Consistent with other museum services which have formed trusts, the educational purpose would be the most appropriate.

However, trusts take time to establish, not because each has to be approved by the Charity Commission on a case-by-case basis, but because vetting and recruiting suitable trustees, establishing in detail the nature, scope, aims and objectives of the venture, compiling and submitting the necessary documents and, particularly, in engaging in detailed negotiations with, in this case, the council are key issues.

Whilst the Charity Commission may well take no more than a month or two to register a charity on its books, the negotiating period is likely to be far longer, particularly when the transfer of publicly-held assets is at hand and over which the residents and rate-payers of the county will most likely wish to express a view. It is therefore not uncommon for such a process to take a couple of years or more to be fully operational once the decision to form the trust has been made.

This has immediate implications for Herefordshire Museum Service in that it requires the service to generate a significant part of its operating budget from the trading of goods and services, including space letting and direct merchandise sales, for the next financial year (FY 2018-2019).

An interim measure, and one that has been used elsewhere, is to transfer the operation, together with the necessary and defined assets to deliver that operation, to an already-established and active charity.

This also presents the further option of creating a subsidiary trust to the existing trust which would enable the museum service to maintain its identity within the wider organisation.

### 7.1 The role of the host partner

We are aware that a soft marketing exercise is currently underway that might attract a range of interest from different companies/organisations to act as host.

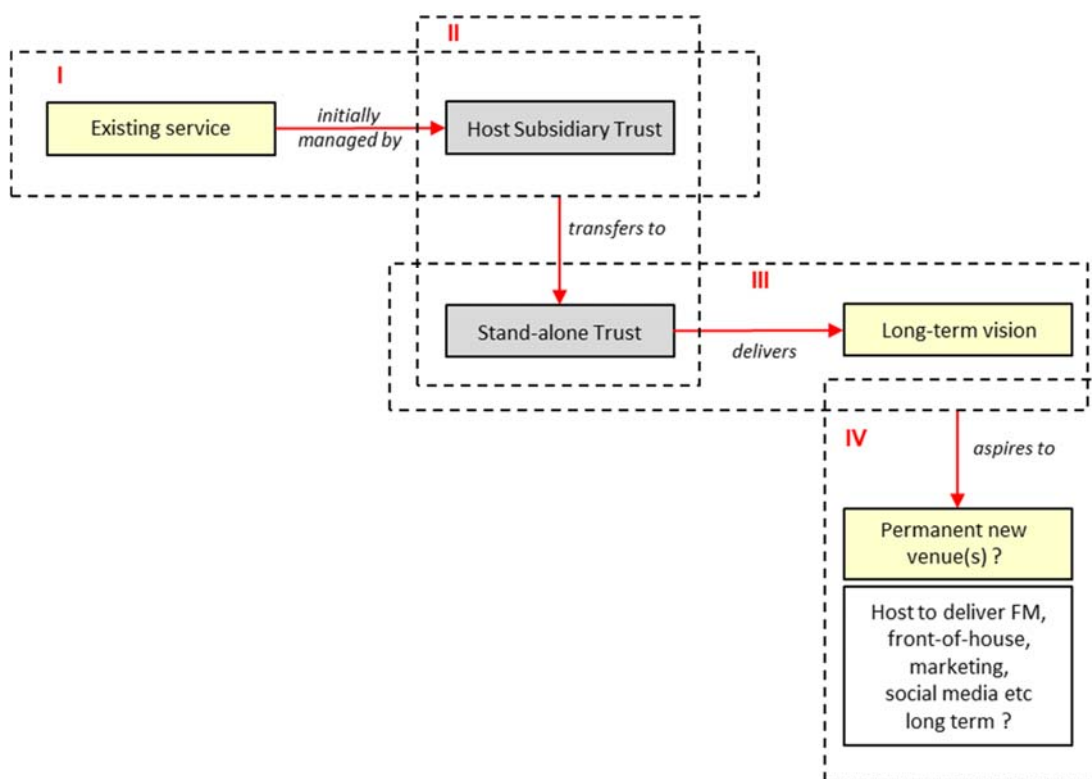
Such an organisation could provide a timely intervention to bridge between the existing situation and time when a new or subsidiary trust could be formed. Also, it could provide support by way of facilities management, marketing, social media engagement, front-of-house, retail and catering expertise which would enable the museum service's staff to concentrate on their curatorial and educational roles unhindered by general operational and administrative concerns.

To achieve this, there would clearly need to be an empathy developed between the museum service and the other activities of the host organisation, coupled with considerations of capacity, the choice of venue, performance, monitoring and evaluation, all of which will need to be described in any to-be-developed management agreement between the parties.

Working across all parties and interests, this transition period could also provide the opportunity to build a new and sustainable brand for the museum service, perhaps – at least initially – as a subsidiary trust.

## 7.2 The model described

This model can therefore be summarised as covering the short (I), medium (II) and long term (III/IV) terms as:



In this model the Council transfers responsibility for the operation of the museum service to a newly-formed subsidiary trust (I) which it operates as a division, or unit, within the company by employing the museum staff who then develop exhibitions and other outreach services using current outlets. This also gives the opportunity to develop a new brand for the service as well as it being able to operate on a county-wide basis from its headquarters building in Friars Street, which should be retained.

The medium-term aim is to create a new, fully-independent trust (II) which will develop a long-term vision for the service (III) focused a new venue for its public-facing operation (IV), perhaps at the Museum and Library in Broad Street or elsewhere.

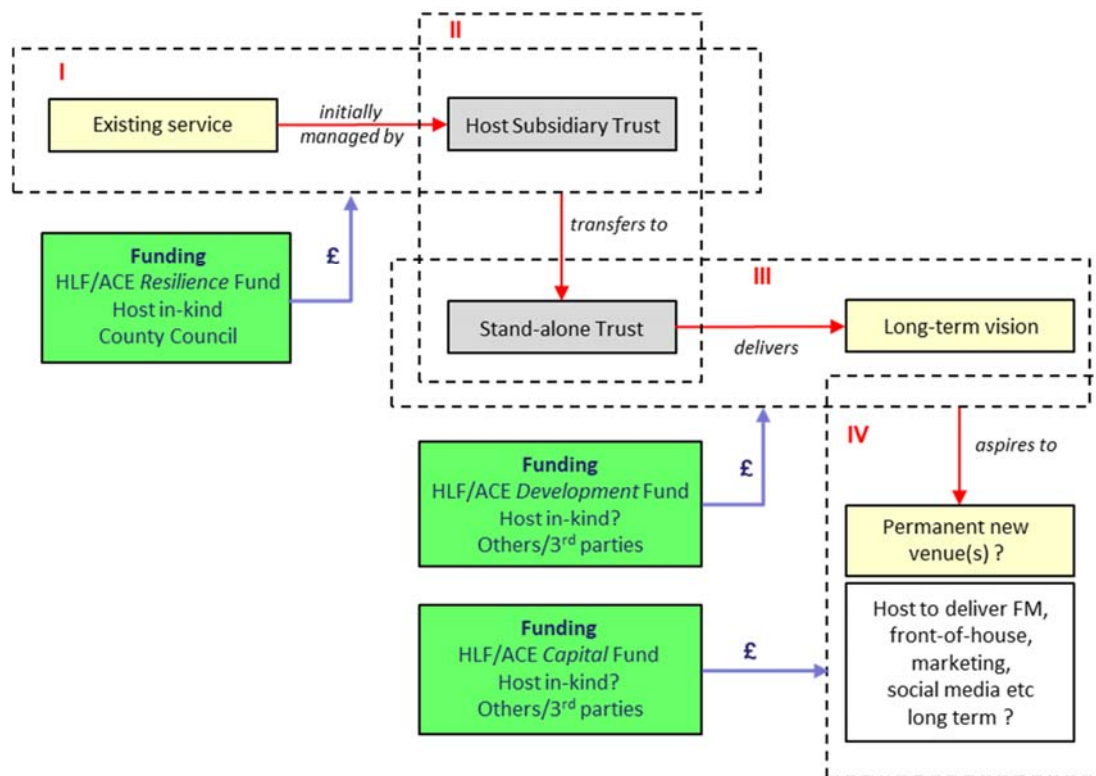
The model has the clear advantage that it does not second-guess future decision-making by any party. For example, if the Council wishes to establish a larger, Museums, Libraries and Archives trust sometime in the future by way of the current soft marketing exercise, the proposed museum trust could become part of it.

Putting a timetable to all this is very difficult. It may be, for example, that Phase I could operate for two-to-three years, Phase II could be an overlapping two years or so, and the planning, design, creation and occupation of the new venue (III/IV) perhaps seven years.

This is clearly a long-term project, the early years' funding for which need to be secured.

### 7.3 Potential sources of funding

A number of sources of funding are theoretically available to support this transitional process, from the county, the potential host, the HLF/Arts Council (ACE) and others.



In summary, Phases I and II could, indeed it is proposed should, be funded by a combination of Council funds, an in-kind (non-cash) contribution from Halo and monies from the HLF or ACE by way of its Resilience Fund.

In this respect, the Council could use an Invest-to-Save strategy to fund Phases I and II and could also make funds available through its Prudential Borrowing powers for later Phases.

Hence, Phase III – the working up of the long-term vision by the trust, could be funded by a combination of the council, the HLF/ACE by way of a Development Grant, Halo by way of its continued in-kind support and yet-to-be defined third parties by way of their contributing to a new service.

Phase **IV** – the delivery of the long-term vision under the trust – will need HLF/ACE capital funds as well as additional, third party funds perhaps through other trusts, foundations and the like, together with possible additional private sector investment. The model suggests that Halo continues to deliver public-facing and FM services on a contracted basis.

Once Phases I and II have been achieved, the chances of delivering Phases III and IV will be greatly enhanced since momentum will have been created and, no doubt, public support engaged.

The HLF and/or the ACE are cited as major sources of funds for all four stages. The Council has, at present, a good working relationship with the HLF, indeed they have funded the current study.

## 7.4 Museums and mental health

One aspect of this mission that museums can contribute to directly is mental health. There is a considerable, and mounting, body of evidence<sup>45</sup> to suggest that the value of ‘museums-in-health’ offers considerable benefit to both health and well-being in many ways, including by providing:

- Positive social experiences, leading to reduced social isolation
- Opportunities for learning and acquiring new skills
- Calming experiences, leading to decreased anxiety
- Increased positive emotions, such as optimism, hope and enjoyment
- Increased self-esteem and a sense of identity and community
- Increased opportunities for meaning-making
- Positive distraction from clinical environments
- Experiences which may be novel, inspirational and meaningful
- Increased communication between families, carers and health professionals.

The Health and Social Care Act [2012] seeks to bring about major changes to the way health and social care services are to be delivered in the future. A key part of these health reforms sees a shift towards the idea that ‘prevention is better than cure’, within a framework which requires a multi-agency approach with an increased reliance on third sector organisations such as charities, voluntary and community organisations.

In their report (source as footnote) Chatterjee and Noble state that ‘with over 2,500 museums in the UK alone, many of which are free, museums offer a largely untapped resource as places which can support public health. ... They are very well placed to address issues such as social isolation, physical and mental ill-health ... and can help to build social capital and resilience, and improve health and well-being’.

They go on to say that they hope that ‘before too long all museums will adapt their access plans to consider health and well-being benefits by targeting specific groups such as those people who are vulnerable, socially isolated, lonely or unemployed, older adults in care, and other health and social care service users such as people with physical or cognitive disabilities’.

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<sup>45</sup> Source: *Museums, Health and Well-being* (Ashgate Publishing) by Dr Helen Chatterjee, Head of Research and Teaching at UCL Museums and a Senior Lecturer in Biology at University College London, and Guy Noble, Head of Arts at University College London NHS Foundation Trust.

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It seems clear from such evidence-based research that the museum service could add significantly to the well-being of the county, and hence provide substantial health, and thus collateral financial, benefits over the long-term.

## 7.5 The view of the Arts Council of England

The Arts Council of England (ACE) took over responsibility for safeguarding standards for museums in England from the Museums, Libraries and Archives Council (MLA) in October 2011.

As well as being the organisation overseeing museum Accreditation, one of its roles is to stimulate innovation in the ways museum services are delivered.

Under the headline *Imagining a Museum*, in December 2016 ACE's Director of Museums<sup>46</sup> set out a vision with four central supports that imagines a future for museums that:

- Value the person, the story and the emotion above the collection
- Put the user before the collection
- Take risks to give experiences that move and change you
- Are changing, creative and entirely individual to their locations.

These are timely notions in that they chime with the suggested role of the museum service in Herefordshire in the coming years in that their stories are suggested to be delivered through carefully-selected objects and exhibitions at locations throughout the county at places that already attract over two million people a year.

Moreover, in a wide-ranging review published in April 2017, DCMS stated that ACE 'must operate as a development agency and focus on developing financially sustainable arts organisations, (including museums) by placing greater emphasis on function, form, performance and governance arrangements<sup>47</sup>.

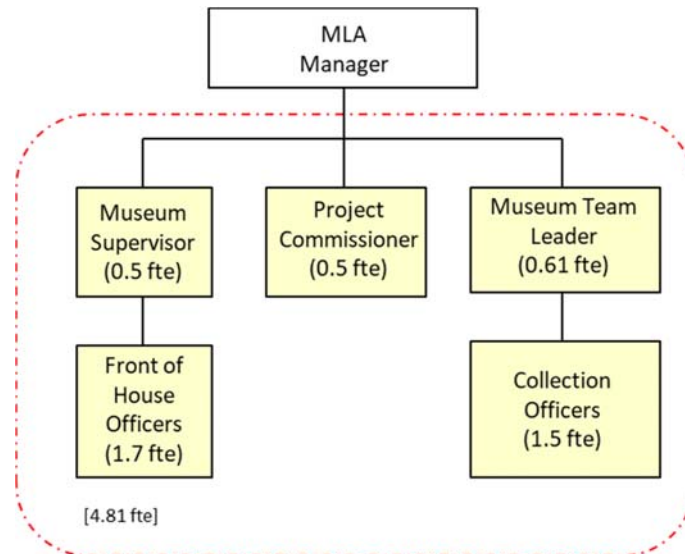
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<sup>46</sup> Posted by John Orna-Ornstein on the ACE's website, 20 December 2016.

<sup>47</sup> DCMS (April, 2017) Tailored review of Arts Council England.

## 7.6 Staffing

The recently-agreed Council model for staffing the museum service as part of a combined Museum, Libraries and Archives service under one manager from the beginning of 2018 is:



This arrangement envisages a total of 4.81 fte staff across the museum service (though the ‘project commissioner’ post includes services for libraries and archives).

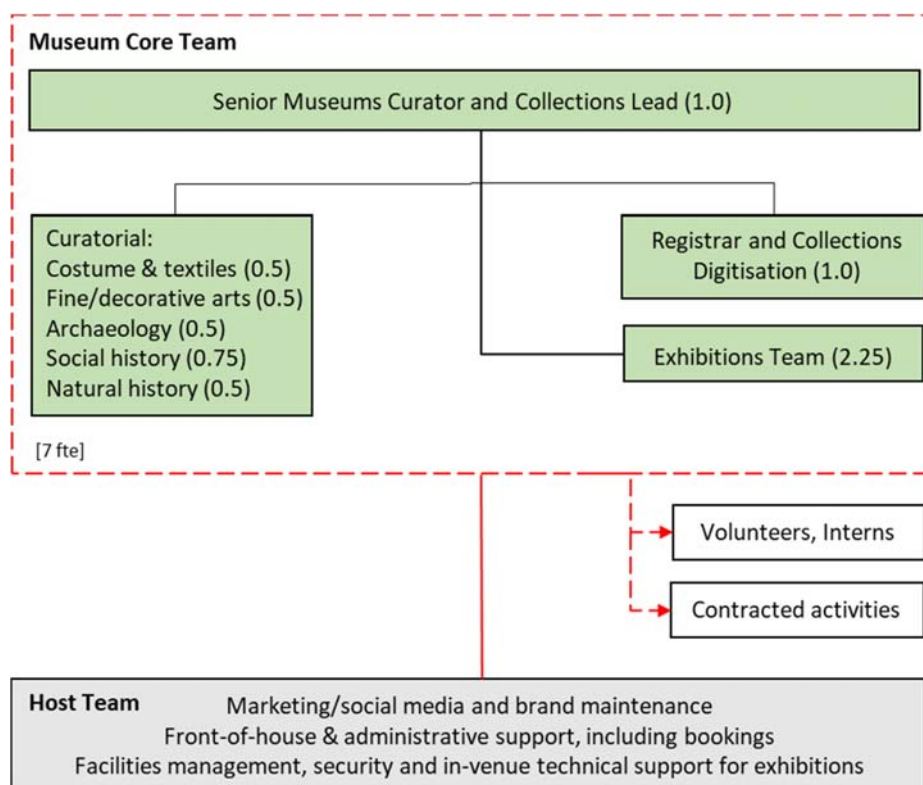
At their heart, museums – like all public services – are people-focused.

The objects, artefacts, conservation techniques, storage requirements and so on are all secondary to what the service can do, and what it can achieve, for both local people and visitors alike.

Thus, whatever buildings and physical facilities are developed for the refreshed service over the short-, medium- and long-terms, these will always remain secondary to the people who will deliver it in vibrant, relevant, enjoyable and engaging ways.

Whilst noting the above, this report recognises that the service needs a refreshed staffing structure to cope with the demands that will be placed on it over the next few years as it develops into a fully-fledged trust.

Thus, the following structure is recommended, based on the involvement of the host organisation for at least the short term (Phases I and II).



The model assumes and requires that **all** professional and curatorial staff will be involved in delivering the core educational, interpretive and outreach functions of, and for, the new service. The days when museums could afford to have separate departments devoted to ‘education’ or ‘public or volunteer engagement’ are long-gone ... each and every member of the professional team will be required to deliver public-facing services, no matter what their particular professional expertise.

In this model, the service’s Core Team (shown in light green and within the dashed red box) comprises the curator/service leader together with curatorial expertise in the disciplines covered by the collections (costume and textiles, fine and decorative arts, archaeology, social history and natural history) plus documentation/technical collections data as well as an exhibitions design leader supported by a small touring exhibitions team with the additional responsibility for visitor and community engagement.

This core team is supported by volunteers (as is the case now, particularly in terms of background research and cataloguing) and by interns (the service currently has relationships with a number of universities in the region), and has the capability of bringing in contracted services (for such activities as object conservation) on as-need and as-affordable bases.

The role of the Senior Curator/Collections Lead is key. This person’s role is not just to manage the day-to-day operation of the Core Team. It is more to be a significant part of the service’s public face in terms of developing partnerships, identifying and raising additional funds and in every way promoting the work of the service locally, regionally and nationally as, effectively, the CEO of the developing trust.

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In total, this model suggests the immediate need for 7 fte staff to deliver the core museum service during Phases I and II which is an uplift on both the existing and proposed arrangements under the Council's recent MLA review.

Not only this, an additional and crucial difference is that the new structure has the core staff working directly for the museum service on purely museological, educational and associated outreach activities rather than engaging in the very necessary, but time-absorbing activities of marketing, front-of-house, reception, administration, web-design and maintenance, retail and other services which are shown to be covered by the Host Team and its staff (in the light grey box).

The emphasis of the work of the Core Team is thus on producing exhibitions and engaging with the public directly. For example, the plan envisages that the service will have direct contact with some 130,000 visitors a year by year 4, far more than it is achieving at present. This is the challenge that, given the freedom to operate, we are confident the refreshed service, with the right staff, can handle.

In overview, the model underpins the far more productive use of the museum service's core team's time, as well as affording both time and resources to be devoted to what both the museum service and the host do best: the host has no experience of running a museum service on the ground; the museum service has no experience of delivering broader leisure and technical services to over two million people a year.

Clearly, the roles, responsibilities and specific terms of engagement for this model can be left for a later date, but the principles of their employment remain valid. It is likely, however, that the host organisation will be asked to pick-up the day-to-day requirements of finance and IT support as well as general HR support.

The costs, and returns, of this proposed arrangement are set out in the following section of this report.



## 8.0 The base financial model – Phases I and II

It is not the intention of this study to develop and articulate a business plan for a new museum development in, say, the current Museum and Library building in Broad Street or as part of new long-term venture in association with NMiTE somewhere else in the city.

Such a proposal is not only too far in the future for meaningful modelling, it is also clear that a raft of decisions, agreements, asset transfers and so on will need to have been negotiated and delivered before any trust-based or quasi-independent service would be in a position to contemplate such significant developments.

It is the intention, however, to develop a financial base for the incremental development of the service until such times as the resources, political will and third-party involvement are in place to underpin such a plan, if considered desirable, viable and politically-deliverable at the time.

The purpose of the model is thus to demonstrate a way in which the museum service *could* be sustained and developed over the next few years to reach a point of self-sufficiency, to develop and implement the potentially-viable long-term trust model and gain additional and third-party support.

It is recognised that any new business model for the museum service must:

- Cost the Council less over time
- Provide the Council with a clear exit strategy (if required)
- Deliver a financially sustainable future for the service as a whole
- Lay the foundation for the potential creation of a financially viable trust (or other such body) to develop the service (perhaps in new premises) over the long-term.

In all this, and drawing on HMG's *Green Book* principles, we are conscious that the new arrangements must provide evidence that the proposals are:

- Fit-for-purpose
- Offer best-value in terms of public engagement, and
- Present a compelling financial and economic case to the council by way of it offering 'best value' over a defined term.

### 8.1 Initial view

Research for this report supports the view that, if the Council wishes to 'spin-out' its museums service, a mechanism using an interim, subsidiary trust which leads to the creation of a stand-alone trust in the medium-term is potentially available that could re-energise the service, starting in the next financial year.

The model proposes the timely interplay of the following entities over Phases I and II:

- Herefordshire Council
- The 'host organisation'
- The HLF and/or the Arts Council
- NMiTE
- Other local firms and supporters.

If this were to be the case, the following base model *could* apply in that it covers a five year period and thus the first two Phases of the four-Phase plan set out above.

		Phase I		Phase II			
		←	→	←	→		
	A	B	C	D	E	F	
1	Year	1	2	3	4	5	
2	<b>Current Operational Position</b>						
3	Museum operations budget (1)	67	67	67	67	335	
4	Projected trading income (1)	0	0	0	0	0	
5	Net annual subsidy	67	67	67	67	335	
6	Cumulative	67	134	201	268	335	
7	<b>Proposed Operational Position</b>						
8	Cost - museum operations (2)	250	250	250	250	1250	
9	Cost - premises etc (3)	0	0	0	0	0	
10	Return to Host	0	0	0	0	0	
11	Net annual subsidy	250	250	250	250	1250	
12	Cumulative	250	500	750	1000	1250	
13	<b>Proposed Funding Scenario</b>						
14	HLF Resilience Funding	100	100			200	
15	HLF Development Funding			125	125	375	
16	Host in-kind Investment (4)	40	40	40	40	200	
17	Herefordshire Council (5)	112	112	112		336	
18	NMiTE	0	0	0	0	0	
19	Projected net trading income	83	95	109	125	556	
20	Net annual income	334	347	386	290	1667	
21	Cumulative	334	681	1066	1357	1667	
22	<b>Outturns</b>						
23	Annual	84	97	136	11	387	
24	Cumulative	84	181	316	327	387	
25	Visitors	75	86	99	114	506	
	<b>nb</b>	all cells are £000 over a full financial year and exclude inflation and VAT; allow for rounding					
	1	includes £30K annual, trading income, but remains the base-line support figure					
	2	staff costs of £200K plus an exhibitions/curatorial operational budget of £50K					
	3	nett zero over the period as assets remain with the Council					
	4	non-charged premises and services costs, including staff time					
	5	contribution by Herefordshire Council by way of operational subsidy and 'invest to save'					

## 8.2 The model described

Phases I and II are shown to overlap as, at this stage, no specific projection can be made as to how long each, individually, will run. It is, however, anticipated that the main trust will take control of operations in or around years 3 or 4 (FY 2020-2021 or FY 2021-2022).

In the model **rows 3 through 7** summarise the projected cost of the museum service from Year 1 to Year 5 under the current arrangements. In total, this would imply an as-now policy investment of net £335K by the county over the period assuming that a total of (same period) £67K a year.

The cost of the museum premises have been set at zero as Phases I and II do not suggest a transfer of assets from the county.

**Rows 8 through 12** show the operation of the model moving towards independent status from Year 3, ie the proposed arrangements.

In essence, operational costs (row 9) are over-doubled and comprise staff costs of £155K (measured over 7 fte – see earlier in this report) plus a £50K a year budget to mount up to around four in-house-created travelling exhibitions in yet--be-determined venues across the county as well as including such items as collections care equipment, collections management database annual fee, refreshing handling resources, membership fees such as AIM, MA, Art-on-Demand and other contributions estimated at between £7K and £8K a year in total.

On this basis, the total cost over five years is projected to be £1.25m (row 12, col G).

**Rows 14 through 21** describe one way in which the service can move towards independence (spinning-out) from the Council by way of the following investments:

- £200K from the HLF by way of a Resilience Grant paid over the first two years<sup>48</sup> (row 15)
- £375K from the HLF by way of a Development Grant paid over three years to begin the trust's long-term development programme starting in year 3 (row 16)<sup>49</sup>
- £200K from host organisation by way of equal, in-kind amounts over five years as investment in the future of its broader cultural offer in delivering its business development plan (row 17)
- Row 17 shows £336K from Herefordshire Council by way of rolling up the first three years operational expenditure (£67K x 3 = £201K) plus bringing forward two further years at £67K (=£134K) as 'invest-to-save', resulting in a flat, three year up-front commitment of £112K a year (=£336K over the five years)
- Row 18 indicates the long-term involvement of NMiTE without assigning any direct financial contribution at this stage, although it could be significant in later phases
- Row 19 shows a net trading income stream from the service's operations at an estimated 110p (net) per attracted visitor. This includes returns from the operation of the Black & White House, the Museum on Broad Street and the MRLC. In addition, at least four other venues a year are envisaged through the relationship with the host organisation, each of which should carry a range of dedicated merchandise. This level of return should be the *minimum* expected each year, particularly as the service's staff will have been freed from the day-to-day activities to be undertaken by Halo and can thus concentrate on exploiting returns from both the new physical locations, events and offerings via a more considered digital presence in association with Rural Media, its proposed strategic media partner. There also needs to be a more aggressively market-oriented approach taken by the service's staff towards earned income, and this may well be facilitated by the move towards the long-term trust option and the creation of a separate brand.

<sup>48</sup> The HLF can make grants of between £3K and £250K to 'help organisations strengthen their organisation, and build the capacity of ... staff and volunteers to better manage heritage in the long term'. [www.hlf.org.uk/looking-funding/our-grant-programmes/resilient-heritage](http://www.hlf.org.uk/looking-funding/our-grant-programmes/resilient-heritage)

<sup>49</sup> These funds are part of the HLF's 'Heritage Grants' programme which offer funds in excess of £100,000 for new projects. There is no upper limit on the amount, and the application is a two-stage process. The funds shown in the model are for Stage 1 (*development*) funds after which Stage 2 (*capital*) funds can follow. The use of these last funds will be for the development of a new museum facility and associated elements, perhaps at the revitalised Museum and Library Building in Broad Street. Further information is to be found elsewhere in this report.

**Rows 22 to 24** show the likely financial outturn of these proposals, in part based on the number of visitors who will engage with the service (row 25).

At 131,000 visitors a year across all venues in the county in year 5 (row 25) the service would still be down on the level of some fifteen years ago, although based on an upward trend. The key, of course, is to continue growth from this new base.

In summary, the model looks to spin-out the service to a newly-formed and able trust over (say) three-to-four financial years from the get-go.

In addition – and very importantly – the museum staff would have immediate access to a larger budget, would be free of time-consuming administrative and facilities management duties, and would thus be able, indeed charged, with delivering visitor numbers back to levels not seen since the early 2000s for which they will have access to county-wide facilities. This is their challenge.

Moreover, this Phase I/II model sets up the service to move towards Phase III and the operation of the long-term trust, during which, it is anticipated, the host organisation would remain on hand to offer continued advice and support whilst discussions with NMITE gather pace.

If this scenario holds good, the percentage investment by the three key parties over the 4-5 years' run of the model would be:

Source	£000	%	
HLF Resilience Funding	200	12%	} HLF 34%
HLF Development Funding	375	22%	
Host in-kind investment	200	12%	} Host (in kind) 12%
Herefordshire Council (5)	336	20%	} The Council 20%
Trading Income	556	33%	} Trading Income 33%
<b>Totals</b>	<b>1667</b>	<b>100%</b>	

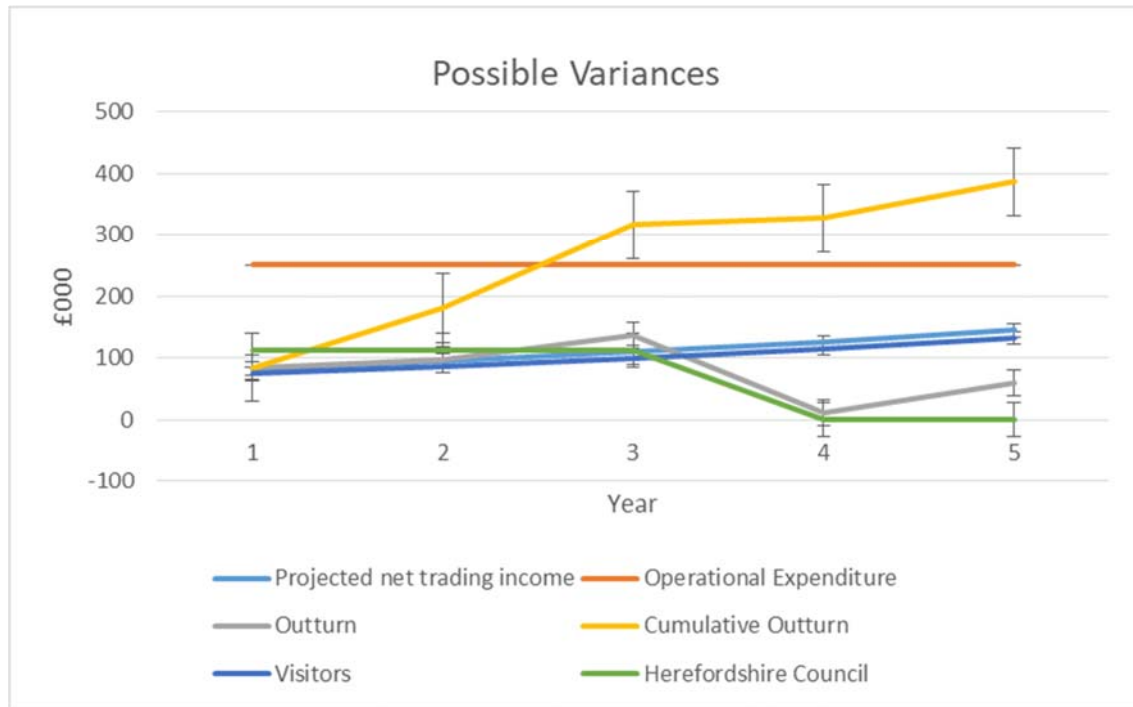
### 8.3 Sensitivities and variances

All simple cashflow assessments, such as that set out above, are no more than approximations; best-guess views of what could or might happen in the future.

Clearly, a number of sensitivities could be applied to any of the figures.

The chart below shows possible fluctuations of 15% on each variable save for projected 'operational expenditure' which is flat.

15% has been chosen as a percentage as it gives, effectively, a 30% variation on each approximation (+15%/-15%), which is considered to be reasonable at this very early stage of the business planning process.



The implications are that whilst the ‘new’ service could, indeed must, generate income from its own activities by attracting visitors, it is reliant – over the first few years – on grant support from the HLF, in-kind support from the host organisation and an albeit decreasing-to-zero amount from the Council.

All this, of course, is to be expected.

Experience has shown that it is simply not possible to spin-out a museum service as a stand-alone proposition from day one: a well-supported transition period is required.

However, if the model works as suggested the new trust will, by year 5:

- Have a viable, functioning museum service
- Nominal cash assets of around £390K
- A potential, on-going and deeper relationship with the host organisation and other partners
- Have essentially devolved operationally from the Council
- Will already be planning its next steps to develop a museum facility somewhere in the city, perhaps in association with NMiTE
- Will have engaged with around half-a-million visitors to its facilities, county-wide
- May have begun discussions with the Council over future asset transfers.

As with any development project, no matter how well-funded in theory, there are always risks. And this project is no exception. The key is thus to find a way to minimise them.

To do this up-front we have suggested that this is a project finance deal ... no money is spent, no deals are done until all monies are to hand and all parties are prepared to sign up.

With this as the basis it is also clear that future (3+ year) funding needs to be in place at some point and the above model suggests how this can be achieved.

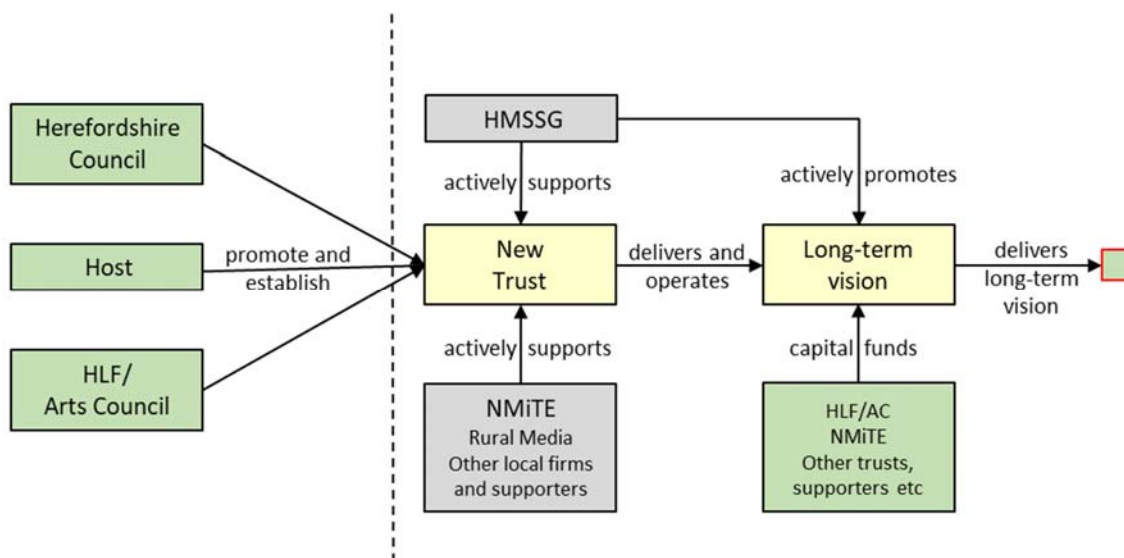
However, a risk exists in the notion as to what happens if the transfer/development fails and the Council is left to deal with the outcome, say in Phases I and II?

To manage this risk, it is proposed that the museum service be required to produce, on behalf of its partners (in the first instance the Council, the HLF and the host organisation), a rolling five year business plan which is reviewed annually and presented for formal approval, particularly in terms of how each’s financial investment is performing. We have no doubt that both the HLF and the host organisation would require nothing less.

This approach ensures that financial and other liabilities are restricted to one operational year for Phases I and II and until such time as the self-supporting Trust (Phase III) is in place.

### 8.4 Delivering the model

To maximise the benefit from, and likelihood of success of, the model needs the cooperation and constructive, timely inputs of at least the following:



In essence, this is shaping up as being a ‘project finance’ arrangement<sup>50</sup> whereby, in this sense, the project should only proceed once all the initial elements (in this case the Council, the host organisation and the HLF/ACE) are in place and are prepared to sign up simultaneously to support the main proposition, which is to create and maintain a new trust to deliver the long-term vision for the museum service and to which, and as a result, other entities are expected to be attracted.

Thus, a period of negotiation will follow *if* a decision to proceed on these lines is made in due course by the Council.

<sup>50</sup> This definition, which means a time-defined, financially-restricted ‘project’, should not, and does not, imply any connection to the *Private Finance Initiative* which has very different origins and very different financial profiles and arrangements.

This approach has the further advantage that the service will be able to operate viably and resiliently during each of the four Phases. Thus, if for some reason Phase **IV** takes longer to deliver than anticipated, the trust can still operate for as long as necessary under the Phase **III** arrangements.

There is also the challenge of the trust attracting grants and other financial support for the long term, especially for Phase **IV** (+/- 5years). This is where the potential involvement of, particularly, NMiTE comes into play in association with the then-on-board trustees.

As with all start-ups the real risks occur in the early years, and are often related to issues around cashflow.

It is therefore essential that, in a project which will span a number of Financial Years (in local authority terms) that thought is given by the Council to the ways in which cash can be offered to the new service before it starts to recoup funds by way of income generation.

In essence, pump-priming funds will be needed and this aspect is picked up later in this report.

## **8.5 Asset ownership: transfer, liability and risk**

It must be remembered that the financial assessment described above is at the level of a headline cashflow.

Given where the project is at the moment, and not knowing how each of the three main parties (the Council, the HLF and the host organisation) will wish to account for their involvement in terms of their own financial arrangements, it is simply not possible, nor is it desirable, to talk of things such as return on investment, net book value, return on capital employed, or return on assets.

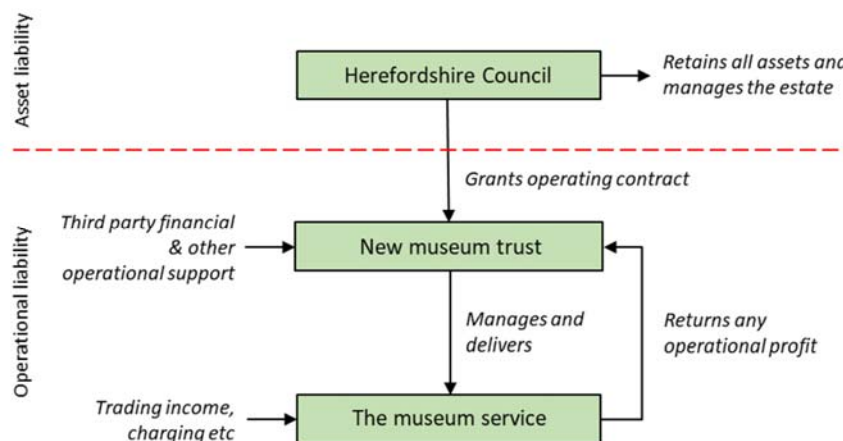
All these considerations and calculations will, no doubt, come into play as the project evolves and as it moves towards becoming financially real. Each party will need, obviously, to take an independent view.

And of course, future arrangements are at least part-dependent on the outcome of the Council's soft market testing of the entire MLA, which is currently underway and for which the outcome cannot even be guessed at.

Moreover, it is impossible to provide greater detail at this stage because there will, or could well, exist highly complicated arrangements pertaining to the ownership of the assets to be assigned nominally to the museum service, and hence possibly onward, perhaps via Halo, to the eventual trust. This applies to both the collections and to the buildings that hold them.

One model in all this might be that the Council retains ownership of the collections and its other museum-related assets (including its buildings) with the new venture (trust or other vehicle) simply taking over responsibility for the operational delivery of the service.

This is a well-established model designed primarily to protect the primary assets from future risk and which could emerge in this case as:



Such an approach would, of course, leave the liabilities of the main assets with the Council but it may, in fact, be content to carry on accepting these by way of insurance against any future operational failure of the new venture, at least over the medium term. In this model if the operational aspect of the service fails, the primary assets remain with the Council and are thus immutable.

In the long term, and having demonstrated sustained success, the Council's assets *could* be transferred to the trust at their discretion. This is the long-term model that has been used successfully elsewhere, for example at Ironbridge.

Furthermore, historic arrangements, covenants and so on, of which P+P has no knowledge, *could* affect the way in which these assets can, or could, be transferred to a trust or other legitimate third party organisation over the medium- to long- terms.

This is because each defined asset will bring with it both contemporary value and historic liabilities.

In addition to the buildings, which might be a relatively straightforward proposition, the ownership and transference of the museum collections (of which there are in excess of 180,000 items, including identified and named collections recorded as being one item) might cause issues, particularly for objects and collections given as gifts to the local authority for public benefit, in perpetuity.

The cost of both establishing and, if needed, transferring title of these objects on an individual basis, could be substantial and has not been accounted for in this report. If, however, title to the objects were transferred from the council to a charitable trust established for public benefit and for the purpose of running the museums, *en masse*, it is unlikely (although not impossible) that significant third-party and legal costs that could impair the transfer would be negated.

In addition, and perhaps of more significance, is that it is a matter of public record that the HLF has previously invested at least £1.22m, possibly upward of £2m, of public funds for the development of the Friars Street MRLC. Whilst this might well indicate that the HLF could be minded to look sympathetically on providing some form of 'resilience funding' this cannot be assumed.



Indeed, if the service were to cease to operate there could theoretically be a claim made by the HLF to recoup at least part of these invested funds<sup>51</sup>. Whilst this might be highly unlikely, the council would be prudent to at least recognise this potential liability as part of its overall, internal risk assessment whilst noting that the HLF is, and will remain, a prime source for future development and (later) capital funding.

Clearly, these detailed legal and financial issues are beyond the scope of the present study which is aimed at plotting a resilient way forward for the service as a whole.

We would thus counsel that the cost of employing legal, accounting and property experts and so on to consider the long-term ramifications of the above (which may be substantial) have **not** been included in the financial models and funding would need to be found.

We can advise, however, that the eventual trust (whenever that emerges and in what form) will most likely require 'clean title' to its assets (whatever they may be and however they may be defined) not least because it will need to have the ability to use them as part of any future business plans, balance sheet calculations and so forth.

There is clearly much to be considered before a settled way forward can be agreed on by all parties concerned.

## 8.6 Initial transfer arrangements

In P+Ps view, there is no doubt a deliverable way forward for the museum service is in prospect.

However, it is understood that a period of reflection, debate and decision-making will no doubt be needed before a decision by the Council can be made. Internal papers will need to be prepared, briefs and the like issued, discussions will need to be had. Due constitutional process will need to be followed against the background of an entirely transparent decision-making procedure

As an example known well throughout the county, the Council and Halo have been through a partnering process over the arrangements entered into over the Council's leisure centres, and hence both have direct experience working together to deliver what is required.

However, as far as the immediate future is concerned and should the Council wish to take this type of arrangement forward (with, for example, an agency or firm that may emerge from the soft marketing exercise) the parties will need to enter into a form of Memorandum of Understanding (MoU) which would subsequently be uplifted to become a full Management Agreement.

Detailed specifications written by and for the benefit of the museum service will need to be originated *by the Council* as an integral part of both the MoU and the eventual Management Agreement.

There should be nothing onerous in these arrangements, but it is obviously important that all parties understand their obligations at the outset.

In terms of timing, and with goodwill on all sides, it would be possible to enter into the MoU relatively early in 2018, thus effectively starting the transfer process. It is recognised, however, that, at the present time, a decision is unlikely to be taken by the Council before May 2018 and after it has

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<sup>51</sup> This happened in Leicestershire in 2015 where the council had to pay back around £145,000 to the HLF by way of non-performance on an investment in its museum at Snibston. In this case the bad press far outweighed the money involved.

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considered the outcome of the soft marketing exercise as part of its more general decision-making programme.

## 8.7 Branding

It is clear that the eventual brand of the new service will have a substantial impact on its markets and the way in which they are attracted particularly as, in Phase I, it is envisaged outlets will be county-wide and based at facilities managed by the host organisation.

The issue of branding cannot be rushed into – nor can its importance be over-stated – it is, after all, the promotional umbrella under which the service will grow and mature, via the proposed trust, into a new and fully-functioning service over the coming years.

Managing and communicating this brand will be an essential part of the interface between the host organisation and the museum service, particularly as the former must have considerable experience of delivering such work across all digital platforms. Whilst technical support can be provided by a host organisation, the intellectual content and associated messages *must* be produced by the museums service.

The new brand will need to accommodate both psychological and experiential aspects: the experiential aspect consists of the sum of all points of contact with the brand – advertising, PR positioning, arrival, access, arrangements for admission and welcome, orientation, exhibitions, ease of access/egress, catering, retail, corporate information, ‘feel’ and so on; the psychological aspect – the brand image – is the construct created in the minds of visitors, and others, and consists of all the information and expectations associated with the service.

We therefore recommend that, as part of this change-management exercise, a new name for the service is researched and developed.

The key here is to create, through a carefully-managed consultative process, an overarching concept that reflects the core mission of the museum service which at the same time recognises its diverse outlets and other potential facilities, together with the ways in which its outward-looking approach serves the greater aim of aiding the well-being of the county.

The cost of this relatively discrete piece of work could come from the HLF as part of its resilience funding.

## 9.0 The way forward

This report has set out the principles underlying the way forward for the development of a potentially resilient museum service for Herefordshire over the short-, medium- and long-terms.

The approach requires, and is in part dependent on, cooperation and constructive inputs from a number of parties including the Council, the HLF/Arts Council and HMSSG, along with other interested parties named in this document.

It is also recognised that a period of reflection, debate and consideration will be needed before a decision by the Council can be made, part of which will no doubt be the assessment of Expressions of Interest received as a response to the Council's soft-marketing exercise for the operation of the MLA service, either in part or as a whole.

There is no doubt that internal papers will need to be prepared, briefs and the like issued, discussions will need to be had. Staff and Councillors will need to be involved. Due constitutional process will need to be followed against the background of entirely transparent decision-making procedures particularly in terms of competitive tendering for future activities. On the current timetable it is anticipated that a formal decision will be made by the Council in May 2018.

Clearly, there are a number of well-rehearsed and contractually-sound ways in which future negotiations could emerge following activities related to 'preferred bidder', 'competitive dialogue', 'two-stage tendering', 'restricted tendering' processes and so on, but it is important to record at this stage that, as part of this process, a series of discussions and other meetings will need to take place leading to the production of, via Letters of Intent in the first instance:

- Draft heads of terms by way of a Memorandum of Understanding between the Council (museum service) and partner organisations
- Draft heads of terms between the Council (museum service) and NMiTE that sets out the principles behind the creation of a new, permanent gallery and exhibition facility to be co-located with NMiTE in the city centre, perhaps as part of the new university campus
- Further and more in-depth discussions with a strategic media partner
- Initial discussions with NMiTE as to the location, design, configuration and layout of new exhibition space(s) within its emerging campus/city centre masterplan, after having previously developed a brief with the museum service
- Principles behind the scope and creation of a new trust for the long-term operation of the museum service
- Briefing documents for potential trustees including the principles behind the trust, person specification(s) and the application process
- Training workshops for potential trustees
- Initial applications to the HLF/Arts Council for the receipt of Resilience Funding to assist in the transfer process from the Council to the new trust.

In addition:

- The museum service should look to plan immediately its first year of in-house, touring exhibitions at to-be-selected venues
- Begin the process of drawing up job descriptions for the recommended new staff posts
- Start the process of creating a new and distinctive brand.

The precise way(s) in which such tenders are to be offered is not a matter for P+P, but rests with the Council and its well-rehearsed procedures.

This report has set out a flexible, justifiable and viable, real-world-responsive model for the future of the museum service in Herefordshire.

Whilst it has described a potential future, it has recognised that at each step on the way issues will arise, challenges will occur and decisions will be made that will affect it one way or another.

The resilience model presented in this report, whilst recognising that a smooth way forward is obviously preferable, has been set up to accommodate and respond to such changes as and when they arise so that a viable future for the service can be maintained.

It is also clear that further work on all aspects of the proposed model is needed and that, if at all possible, continuity in the process is maintained.

To ensure that this takes place implies that pump-priming funding will be required sometime in the New Year.

In light of all this, a more detailed activity programme from January 2018 can be projected to be:

<b>A</b>	Consider other development programmes (eg, soft market test) to consider recommendations for the museum service	Feb 2018
	Feedback to stakeholders	Mar 2018
	Present options and recommendations to Cabinet	May 2018
<b>B</b>	Implement agreement of Herefordshire Council Cabinet on future delivery options	Jun 2018
	Funding for next phase of feasibility and development work	Jul 2018
	Instigate process for supplier of the service based on an outsourcing model, preparation work eg, TUPE, legal and finance	Dec 2018
	Outline agreement in place and transition period - January to end of March	Mar 2019
<b>C</b>	Operation and delivery	Apr 2019
<b>D</b>	Review and further development	Apr 2020

## A1 A new visitor destination?

In April 2017, the 31 Broad Street Development Group set out proposals for a new cultural hub by ‘transforming the existing Hereford Library, Museum and Art Gallery building into an inspirational physical and virtual resource for the people of Herefordshire’.

Whereas the focus in this current report, in terms of the resilience of the museum service, has shifted from the creation of a new visitor destination in the city centre to a mode of governance which will enable the service not only to survive but prosper long-term, the ultimate goal must remain in view. This is to have a fully-functioning museum service with the permanent and special exhibition of its collections (and others) in the heart of Hereford's ‘cultural quarter’.

Having said this, with the pace of technological and social-media development it is difficult to predict what museums will need to offer in the next ten years to attract local visitors, cultural tourists and young people in particular. What is certain is that their collections will need to continue to be conserved and accessed for academic study and preserved for research and investigation by future generations.

It can also be assumed that there will be a spatial requirement for the display and interpretation of elements of the collections as part of temporary or permanent exhibitions, or virtual experiences, together with associated curatorial and visitor facilities.

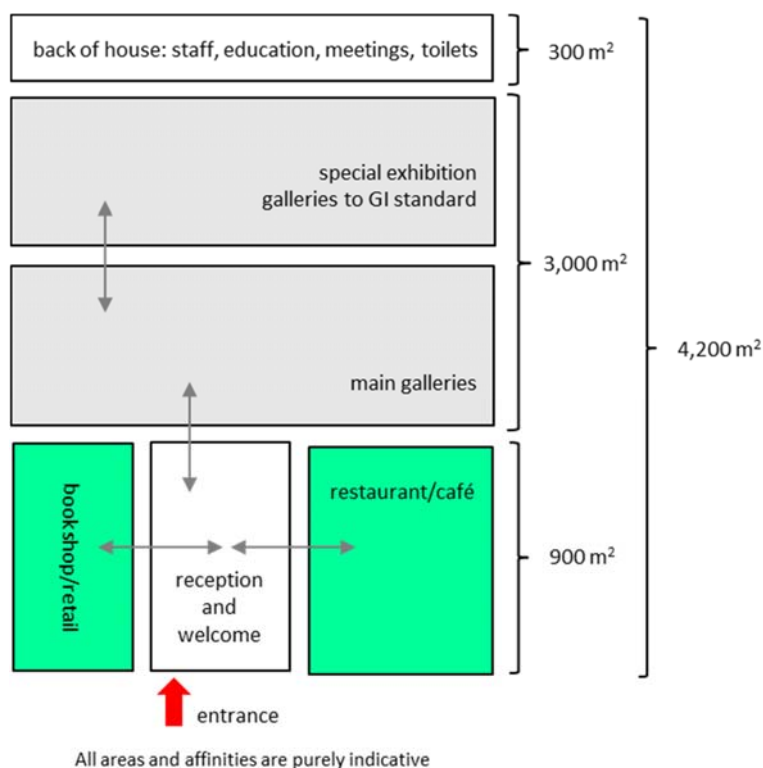
An initial assessment by museum staff of the spatial requirements in an idealised new, full-capability facility is shown below. One module is equivalent to the area of the existing museum gallery space in Broad Street = 152 m<sup>2</sup> (NIA)

This would enable approximately 5-10% of the museum’s artefacts to be displayed at any one time. It would also enable high-level exhibitions to be brought in linked to national galleries, national museums, other major institutions and high profile artists.

Function	Spatial requirement
Retail outlet – museum merchandise, Herefordshire made products & crafts	1 module
Café/Restaurant	½ module
Toilets/baby changing/baby feeding/Cloakroom/buggy parking	½ module
Educational Room	1 module
Store for exhibition cases, equipment, stock	1 module
Office/admin/exhibition preparation (most work done off site)	½ module
Temporary exhibition gallery	1 module
Small temporary/touring display area	½ module
Fine Art gallery	2 modules
Brian Hatton gallery	1 module
Costume gallery	2 modules
Textile gallery	1 module
Archaeology galleries: Prehistoric, Roman, & Medieval Herefordshire	3 modules
Social History galleries: Rural crafts, Victorian and 20 <sup>th</sup> century Herefordshire	3 modules
Agriculture & vehicle galleries	2 modules
Furniture gallery	1 module
Decorative Arts gallery	1 module
Treasure and Coins gallery	1 module
Natural Sciences galleries: geology, animals/birds, herbaria	2 modules
Hereford Gallery	1 module
Discovery gallery under 5's and primary	½ module

Digital media and archive film gallery	½ module
Garden gallery and discovery area	External
	27 modules = <b>4,104 m<sup>2</sup> NIA</b>

Based on this paradigm a possible, theoretical arrangement of space might emerge as:



The m<sup>2</sup> spaces for galleries (both main and special) have been taken from the projected requirements of the museum service: in essence 3,000 m<sup>2</sup> of display space supported by ancillary facilities. This large facility would be roughly ten times the space occupied by the museum service in its current premises in Broad Street, and would perhaps require a capital investment in the region of say £15-£20 million.

The proposed special exhibition galleries would be designed to meet Government Indemnity standards meaning that exhibitions from UK national museums, and similar institutions overseas, could be accommodated with ease, thus adding significantly to the attractational qualities of the place.

Of course, if such a space were to be designed and created from the outset in close association with NMiTE, savings could accrue due to the combined use of facilities.

An initial exploratory discussion with the senior conservation officer at Herefordshire Council suggested that, whereas the existing Museum and Library building in Broad Street, justifiably known as 'an ornament of the city', is Grade II Listed, its status would not necessarily prevent significant redevelopment of the spaces behind the original Rankin building providing any such proposals were fully supported by a robust heritage case and conservation management plan.

In the above, the Library has not been mentioned.

This is not to imply by way of suggestion that the Library could not be involved. It is more that (a) P+P was not asked to consider the Library and (b) the Library's demands and future should, quite rightly, be the subject of further thought and, perhaps, further study.

## **A2 Museum, Library and Archive Plans (2017–2020)**



## Museum Plan 2017-20

### Introduction

Over 180,000 historic objects are in the care of the museum service of Herefordshire Council. These collections give an insight into the history, identity and uniqueness of the county. As well as caring and preserving those collections for future generations the museum service also ensures access to an array of artefacts through events, the operation of sites and on-line.

This document outlines Herefordshire Council's plans for the museum service during the next few years highlighting it's role going forward and linking to the wider objectives of the council.



Beetles from the entomological collections

### Outline of the service

The origins of the geological and botanical collections can be traced back to the Herefordshire Literary and Philosophical Society, founded in 1836 and the Woolhope Club founded in 1851, both several years before the opening of the County Museum in 1874.

The collection is predominately owned by Herefordshire Council with a small number of items on loan. The collections comprise of a wide variety of subjects covering archaeology, social history, costume and textiles, fine art, decorative art and furniture, documents, photographs, numismatics, arms and armour, ethnography, natural sciences including geology. The costume and textile collection itself is of national significance with items from the 17<sup>th</sup> century to the present.

The focus of the collection is based on understanding Herefordshire's social and natural history. Experiencing the collection is important with the key displays at Hereford Museum and Art Gallery, and the Black and White House Museum. As well as displays, experience to the collections is also through educational activity, special events and campaigns, and digital access. The collections themselves are housed in one of the finest dedicated museum stores in the country, which was established in 2008 supported by major investment by Herefordshire Council and the Heritage Lottery Fund.

Documentation is an important element of the museum service in recording the vast collection to be accessed digitally and creating a comprehensive record.

In April 2017 entrance fees were introduced for the Black and White House to support the sustainability of the service and enable the care of the collections. There is also recognition that how people access heritage is changing and competing with other forms of leisure, in an existing environment of reduced funding.

## Purpose and Vision

The museum service's purpose is to connect people with Herefordshire's past by creating opportunities for direct engagement with museum objects for exploration, enjoyment, curiosity and wonder. The museum sites also have a role to play in generating tourism and pride of place for local people along with other museums and heritage attractions operating in the county independently of the council.

Herefordshire Museum Service Access Policy 2016-19 outlines a vision that "Herefordshire museum service aims to develop and deliver museum services that allow people the freedom to explore, enjoy and participate in their heritage in a way that respects and attempts to fulfil their particular needs and desires. Herefordshire Museum Service aims to create equality of access for everybody by minimising or eliminating barriers to access."

There are three key elements to deliver this vision:

- Collecting and caring for objects and their stories reflecting Herefordshire life: past, present and into the future
- Enabling lifelong use, learning and enjoyment of the museum collections through interpreting and sharing our expertise and knowledge
- Fostering a sense of place and community and promoting well-being.

## Objectives

1. **Care and access:** provide access to collections as widely as possible, whilst ensuring the best standards and practice in collections care as possible
2. **Sustainability:** transform the museum service delivery model to enable continued provision of a sustainable and vibrant museum service for the county of Herefordshire, with an appropriately skilled workforce and supported by partner organisations
3. **Income:** develop income generation systems that create a resilient financial base to support the museum service and its activities
4. **Engagement:** deliver engaging experiences, displays and activities with high levels of customer care
5. **Collections:** ensure the collections are relevant to Herefordshire and include a programme of digital documentation.

## Links to the Council Priorities

This section looks at how the services deliver on Herefordshire Council corporate priorities.

### Enable residents to live safe, healthy and independent lives

- Volunteering opportunities for new skills, social engagement and self purpose
- Courses and classes to enliven minds and facilitate interaction
- Reminiscence work stimulating mental capacity for the elderly
- Community engagement to broaden experience and strengthen sense of place.



Events at the Black and White House used to interpret history

### **Keep children and young people safe and give them a great start in life**

- Run a variety of activities for children at the different sites
- Schools education sessions available at the Black and White House and Museum Resource and Learning Centre
- Access to resources for college students and educators
- Involvement in campaigns and partnership initiatives.

### **Support the growth of our economy**

- Museums as key attractions for tourists giving a reason to visit, stay longer and spend more (70% of visitors to Black and White House are out of county)
- Support the regeneration, identity and vibrancy of Hereford specifically the Black and White House used as an icon of Hereford
- Museums as part of the cultural heritage and leisure of the area, supporting reasons for inward investment for relocating companies
- Support the development of the new university adding value to the university offer.

### **Secure better services, quality of life and value for money**

- Charge for visits to the Black and White House for further sustainability of the museum service
- External funding to review the future model of the museum service
- Make best use of people's interest in being volunteers for the museum service
- Extend cross service partnership working.

### **Major programmes**

To support a comprehensive volunteer workforce to assist in the care of the collections and the operation of the sites to aid customer experience.

Reform the schools offer centred on the Black and White House and collections at the Museum Resource and Learning Centre.

Review the model of operating the museum service linked to libraries and archives including working with partner organisations on its long term sustainability.

Deliver a programme of collection care including assessment and rationalisation of social history, and improved storage for natural science, archaeological, costume and furniture collections.

Significant promotion of the Black and White house as income generation.

Run programme of activities to support interpretation of the collections and the wider heritage of Hereford and Herefordshire.

Continue with documentation and digitisation of the collection for increased access to objects on-line.

Explore funding opportunities for the Museum Resource and Learning Centre linking to improved visitor experience and access to the stored collections.



Reference to further information:

- Collections Development Policy 2016-19
- Archaeological Deposition Policy 2016-19
- Humans Remains Policy 2016-19
- Care and Conservation Policy 2016-19
- Care and Conservation Plan 2016-19
- Documentation Policy 2016-19
- Documentation Manual 2016-19
- Documentation Plan 2016-19
- Access Policy 2016-19
- Access Plan 2016-19

## Archives Plan 2017-20

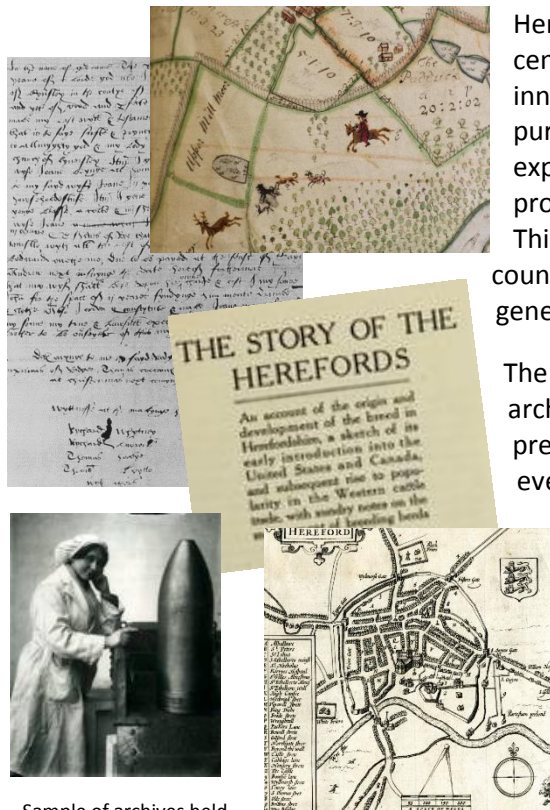
### Introduction

The Archive Service based at HARC (Herefordshire Archive and Records Centre) holds in the region of 7,800 archive collections occupying over two miles of shelving, with archives dating back as far as the twelfth century. This provides an incredibly valuable resource and a rich source of historic records used for research, study, education and recreational family and social history. The creation of a dedicated passivhaus building at HARC in 2015 means Herefordshire has one of the country's leading centres for archives in terms of visitor experience and storage of the collections.



This document outlines Herefordshire Council's plans for the archive services during the next few years recognising the value to individuals and communities balanced with continued pressure of public sector expenditure which will have impact on how services will be delivered in the future.

### Outline of the service



Sample of archives held

Herefordshire Council took the step to create a purpose built centre for archives, which has been recognised for its innovation and quality through numerous awards. The core purpose in creating the building was to improve the visitor experience when researching the collections along with providing the right environment for the longevity of archives. This allows the archives owned by the council and in the council's guardianship to be enjoyed now and for future generations.

The service has an important role in conservation of the archives and records, repairing damage created in the past and preventing any further deterioration. The service also runs events to raise awareness of the archives using them as a source of education and learning. Increasingly the archives are being made available on-line to support people's access if unable to travel to HARC.

HARC itself was built to support local and community engagement hosting relevant local events, exhibitions and providing the learning room for hire.



Records held fall into the following categories:

**Diocesan** covers parishes in Herefordshire, South Shropshire, and parts of Worcestershire, Monmouthshire and Powys. These documents date from the thirteenth century onwards and cover a wide range of Hereford Diocese's functions through to the present day. Latin was the preferred language of many of these documents until 1732. Bishop's transcripts, court books, marriage bonds and allegations, tithe maps and apportionments, and wills are available on microfilm.

**Parish** - registers and records of Church of England parishes within the county of Herefordshire, as well as those of several parishes outside the county. Many churches have deposited their pre-1900 registers of baptisms, marriages, burials and banns, which are mainly made available to the public in microfilm format.

**Local Government** - the historic records of Herefordshire Council, and its predecessors; also Hereford City and Leominster Borough, as well as district and parish councils. Records of pre-1889 county government are within Herefordshire Quarter Sessions (part of the public records collection). School and Board of Guardians (workhouse) records, where they have survived, are also deposited as part of the local government collections.

**Private** – these form a large portion of the holdings and relate to all aspects of the history and development of the geographical county of Herefordshire, and its inhabitants. Collections include the archives of non-conformist ecclesiastical bodies, businesses, estates and manors, private individuals, and a wide range of societies.

**Public** - The National Archives has designated Herefordshire Archive Service as a Place of Deposit for public records. Generally, public records are created by a central government department or their predecessor. These include Church Commissioners records, coroners' records, constabulary records and magistrates' court records.

## Purpose

The purpose of the service is to provide access to the archive collections and preserve them for future generations. This creates a research and resource base for understanding the individual and collective heritage of the county through the evidence of source documents.

There are four key principles influencing the delivery of the archive service:

- To comply with the requirements of all relevant legislation and local government acts regarding the safe-keeping and democratic accessibility of records.
- To enable the collections to be accessed and enjoyed as a source of inspiration and education without compromising the care of the archive.
- To sustain the operation of the service through maximising earned income, sponsorship and charging.
- To make the most of partnership with business, community, friends group and volunteers to promote, utilise and develop HARC and the archive collection.

## Objectives

1. **Care:** preserve collections through an ongoing programme of conservation, to include prevention activity that addresses risk of further damage
2. **Engagement:** to support people's well-being, learning and enjoyment using the collections as a route to history through exhibition, talks and events including sessions specifically for children
3. **Multi-use:** to encourage the varied use of HARC to maximise the building and forge links to the community, council departments and the visitor market
4. **Digital:** to support digital access to the finding aids and collections, including cataloguing and indexing of the archives to enable world wide access
5. **Community involvement:** to work in collaboration with friends, other stakeholders and interest groups to shape the service going forward and improve the offer through funding and support; along with volunteers as a valued resource to assist the service
6. **Council needs:** to meet the local authority's statutory and service needs with the archives being a resource for planning, development, enforcement and education teams
7. **Finance:** use the resources available to best effect and generate income through a range of means, whilst creating savings in the operation of the services.

## Links to the Council Priorities

As well as public access, the council itself will access the archives for planning, enforcement and development. This section looks at how the services deliver on Herefordshire Council corporate priorities.

### Enable residents to live safe, healthy and independent lives

- Opportunities for research which keeps the mind active and engaged, including family and local history
- Network of volunteers engaged in a number of projects including preservation, cataloguing and digitisation
- Community events, workshops, activities and exhibitions for all ages
- Developing HARC as a Dementia Friendly venue.

### Keep children and young people safe and give them a great start in life

- Formal education sessions available for schools to support understanding of many curriculum subjects, but especially history through the archive material
- Informal learning via community classes and workshops available for children to participate in
- Link with museums and library with joining promotion and projects for children
- Project work with community groups such as SHYPP.

### Support the growth of our economy

- Attract visitor economy through reach of the unique archive and family history tourism
- Contribute to the regeneration of the Rotherwas enterprise zone
- Provide property and land information for developers.

### Secure better services, quality of life and value for money

- Repository for the Council's own records as the "corporate memory" of the organisation which can be used within audits, litigation and inquests for example
- Itinerary of charging for services and use of HARC facilities
- Create efficiencies through shared site at HARC with other services of the local authority, including provision of meeting and event space
- Review the opportunity for management of the services through commissioning.

### Major programmes

Acquire and develop electronic archive management system.

Develop volunteer programme for digitising Bustin photographic collection and uploading onto Herefordshire History website.

Submit application for service accreditation by The National Archives.

Support Rotherwas ROF Front Line Duty Heritage Lottery Funded project to engage with the community to commemorate the contribution of the munitions workers.

Support phase 2 of "Herefordshire Life Through a Lens" project (Derek Evans photograph collection) to engage with volunteers to catalogue and digitise elements of the collection.

Develop and promote programme of regular talks and workshops at HARC to raise awareness and generate an income.

Develop marketing strategy for commercial use of Learning Room.

Develop income generating archive conservation, preservation and consultancy.

Explore working with commercial web-based providers to supply access to digitised collections.

Assess the future governance arrangement of HARC.

Participate in projects with schools and community groups for children and young people.

Links to further information:

- [www.herefordshire.gov.uk/HARC](http://www.herefordshire.gov.uk/HARC)
- [www.nationalarchives.gov.uk](http://www.nationalarchives.gov.uk)
- <http://www.nationalarchives.gov.uk/archives-sector/projects-and-programmes/strategic-vision-for-archives/>



Purpose building archive centre opened in August 2015. The award winning building is energy efficient based on 'passivhaus design'.



# Library Plan 2017-20

## Introduction

Libraries in Herefordshire have in the region of over half a million visits every year and over 30% of the county's population are regular library users. Libraries are part of the nation's cultural and heritage landscape and have transformed over the years to become community resources catering for changing needs and expectations. Though the main reason people visit a library is to loan a book, the scope of what people can do is increasingly diverse. Library services extend beyond the fabric of buildings to provide a multitude of opportunities for people of different walks of life and different ages to benefit from.

This document outlines Herefordshire Council's plans for library services during the next few years; recognising the value to individuals and communities along with opportunities to support the wider objectives of the council.



Ledbury Library in the Masters House as part of major development in 2015

## Outline of the service

Herefordshire Council, along with many other councils, has had to review how it operates its library service. This includes responding to technology changes, digital access and how people access books and the wider use of libraries as community venues.

The authority has managed to maintain all the county's libraries, working closely with communities in many instances supported by volunteers, parish councils, service users and local groups. Each of the 11 libraries has its own character and will operate differently to meet local needs, with co-ordination and development by a central county library team. As well as the libraries, the service runs a host of activities including supporting a network of reading groups, reaching out to housebound residents with targeted delivery, visits to home and day care centres, schools library service, e-books, books on prescription, books for babies, along with special campaigns and programmes.



## Purpose

The purpose of the library service is to promote wellbeing and enrich lives for people through different stages of their life. Libraries are ideally placed to be safe places that the community feel comfortable

using, which have no barriers to age, background or income level. The range of services provided are particularly relevant to children at the foundation of their learning and for people of different ages that want to feel connected to others and their community. Libraries are also resource centres with access to technology and advice, often shared with other support services, and used by voluntary groups for community activity.

There are four key principles influencing the delivery of the library service:

- Provide and enable a free core library service across Herefordshire, supporting social interaction and reducing isolation.
- For centres to provide shared spaces as part of the community life of an area, fostering local regeneration and local identity.
- Promote reading for all ages and access to books, supporting learning and discovery.
- Work with the community to provide the level of library service want through support of community-run libraries and volunteering.

## Objectives

1. **Children First:** support the learning and development of children through dedicated spaces and specific programmes for children, fostering the education, attainment and employment opportunities of future generations, showing that reading is a pleasure from an early age to any age.
2. **Multi-use:** to encourage the varied use of the library for different purposes, make the most of the library buildings, including a range of partners providing like and supportive services that generate an income for the services.
3. **Wellbeing:** to support people's wellbeing by developing the libraries as places for information, engagement and activities. To use the wider library services to aid people's mental health through reading, interaction with others and involvement in activities.
4. **Digital inclusion:** to help break down the barriers to going on-line by providing free-to-use PCs and wifi, often acting as an introduction to using the internet to access goods and services.
5. **Community involvement:** to work in collaboration with friends groups, town and parish councils to aid access to libraries including fundraising for projects and extended opening; operation of the community libraries and programmes to aid learning and engagement.
6. **Reaching further:** to encourage the use of libraries by people who would benefit most from the services, often reflective of generations of families who have not used libraries but would benefit from the opportunities they present. This to be achieved by collaboration with different parts of the council services, promotional campaigns and targeted activity.
7. **Safe places and safeguarding** – for the libraries to provide safe havens for people, with staff trained to respond to the need for help and to recognise a potential safeguarding issue and act on it.



Photo: self-serve at Hereford Library (above); Library service delivery against 7 outcomes “Library Delivery” Libraries Taskforce 2017.

## Links to the Council Priorities

This section looks at how the services deliver on Herefordshire Council corporate priorities.

### Enable residents to live safe, healthy and independent lives

- Run the delivered services reaching housebound residents, residential homes and sheltered housing with reading choices
- Provide information on wellbeing at libraries and operate books on prescription scheme in partnership with GPs
- Collaborative with MIND including book club and exhibition in Hereford of art work
- Specific “access” membership for older people, vulnerable adults, residents with physical and mental disabilities, and carers
- National Reading Well offers for people with dementia, adult mental health, long-term conditions
- Books in alternative formats for visually impaired residents

### Keep children and young people safe and give them a great start in life

- Family friendly libraries providing a safe, welcoming environment
- Ceasing fines for children’s books
- Booktrust’s bookstart programme for children to have their own reading resources
- Resources and events to support literacy and learning
- Staff trained in “making every contact count”
- Schools Library service to primary school and library service to high schools
- Links with children centre services, including using libraries for activities
- Summer reading challenge; bounce and rhyme, schools visits
- National Reading Well offer supporting young people’s mental and physical health
- Targeted school events for improving and reluctant readers
- Workshops to stimulate interest in creative writing
- Special reading collections foster families

### Support the growth of our economy

- Free wifi and public use PCs for job searches, plus IT courses
- Shared facilities at Ross Library for Job Centre+
- Volunteer work placements to improve skills
- Rural book schemes in shops and community venues
- Resources and classes improving language and functional skills
- Promote local authors and artists through sales and exhibitions
- Support and promote local festivals and cultural events

### Secure better services, quality of life and value for money

- Introduction of self-services points to reduce the need to queue
- Shared sites with external organisations, departments and hire of venues
- Regional consortium for stock purchases to reduce purchase costs
- Increased income generation opportunities including online access to local history resources supported by sales
- Fundraising partnerships and projects to support the objectives of the library service
- Review and develop library online systems
- Working with parish councils and library friends / user groups to operate community libraries

## Major programmes

Consider options for developing and maximising the use of Hereford Library.
Improvements to Ross Library linked to children centre provision.
Improvements made to the use and layout of Leominster Library.
Create wellbeing areas at libraries for easy access to resources and information.
Operate and promote adult events programme and school Book Festival, involving community organisations and partners.
Explore models for future delivery of the library service linked to archives and museums.
Extend the offer for e-books.
Promote schools library services and delivered library service.
Develop Herefordshire History website, improving online access to local history resources.
Publications programme and merchandising.
Involved in heritage and culture partnerships and projects e.g. Derek Evans Studio project, ROF project, Traveller collection, Dymock poets, Ross Gazette, etc.
Review and develop library management systems (move to cloud-based LMS, explore self-service printing, etc.)
Targeted projects with vulnerable adults, children and young people.



Further information: Profile of Hereford Library service: [www.herefordshire.gov.uk](http://www.herefordshire.gov.uk) with the following links:

- Library Facts and Figures
- Books for Health
- Friends and Development Groups

## A3 Herefordshire Cultural Strategy 2018-2028 (Summary)

### Summary for Consultation

**Vision:** Herefordshire by 2028 will be a culturally vibrant, prosperous and sought after county in which to live, work and to visit. Hallmarks of the County will be its glorious landscape, its heritage and history, its diverse cultural offer and its youthful ambition.

The formation of Herefordshire Cultural Partnership (HCP) in 2016 was an important step towards providing the cultural leadership necessary to ensure that creativity and heritage in Herefordshire continues to grow and thrive, and that culture plays an increasingly vital part in the lives of all those that live, work and visit the County.

In March 2017 Arts Council England awarded HCP a grant to commission a consultancy to better inform the development of a Cultural Strategy for Herefordshire. Create Associates <https://createassociates.co.uk> were appointed and have produced the report '*Looking to Herefordshire's Creative and Cultural Future*'. Rural Media Charity [www.ruralmedia.co.uk](http://www.ruralmedia.co.uk), supported by an HCP steering group, is providing co-ordination and administrative capacity to produce this Cultural Strategy.

The Report recommends a framework for cross-partner work in support of cultural events, arts, heritage, libraries, archives, creative industries, public health, education, planning, and other partner areas. As a priority the Report recommended that HCP should evolve into a robust accountable body to oversee the development and delivery of the Cultural Strategy.

### What is a Cultural Strategy?

Successful areas are recognised by their quality of life, by strong communities, their creative vibrancy and cultural identity, all of which underpins an area's economic performance and standing nationally and internationally.

A cultural strategy seeks to identify, expand and make more accessible the range of opportunities for residents and visitors to experience and enjoy the arts and heritage that surround them. It is a means by which a wide range of relevant partners – individuals, organisations and institutions – can work together to achieve a prioritised range of outcomes that will improve the lives and prospects of their communities, and enhance their sense of place and identity through increased awareness of their heritage.

A cultural strategy provides the basis for planning and undertaking ambitious actions to bring about change, and the means for effecting that change through collaborative bids for funding, planning and organisation.

Culture is taken to be the broad framework that defines how people live and that give their lives value and meaning. It encompasses creativity, imagination, ambition, joy and delight, and is normally though not necessarily expressed through cultural activities and institutions. Although we are not treating culture so broadly as to include shelter, health, education, nutrition or social welfare, it is now recognised as an essential and powerful basis for their effective provision and enhancement.

### Why do we need one?

Create Associate's report, *Looking to Herefordshire's Creative and Cultural Future*, based on desk research and interviews with over 50 individuals and organisations identified a range of strengths, needs and opportunities to grow the cultural offer of Herefordshire, including:

- Identifying and building consensus around a clear set of cultural priorities
- Embedding a cross-sector approach to culture, including public, voluntary and private sectors
- Collaborative working, and of identifying and promoting the County's cultural assets, including its venues, landscapes, heritage sites and festivals



- Strengthening communications across the County including digital communications and effective use of cultural data
- Engaging young people in cultural development and leadership
- Collecting, conserving and celebrating the County's physical & cultural heritage – landscape, museums, historic sites for future generations
- In an age of austerity, developing new funding models and financial instruments to sustain cultural growth
- Supporting creative micro-businesses which are the building blocks on which to develop and retain talent
- Re-generating underused and out-dated buildings to provide 21<sup>st</sup> Century offices, studios and meeting spaces for cultural entrepreneurs
- Mitigating the County's challenging age demographic by initiatives that connect young talent with the knowledge, contacts and resources of older residents.

### What are we aiming to achieve?

The Herefordshire Cultural Strategy 2018-28 will continue to evolve over its 10-year journey towards achieving its vision. It is important that the strategy remains flexible and consultative in order to stay fresh and embrace new ideas, people and technologies. The Herefordshire Cultural Partnership and its members will undertake on-going research and evaluation to inform the implementation of the strategy. An annual culture conference will bring together all interested parties together with inspirational cultural leaders from other areas of the UK and Europe to help shape plans for the year ahead.

The strategy will set out a 10-year vision for the cultural life of Herefordshire, building upon the County's existing heritage and creative activity and organisations. Our prioritised aims are proposed as:

1. Great Place – we will raise Herefordshire's profile nationally and internationally as a great place to live, work and visit
2. Children & Young People – we will engage more effectively with children and young people, and make the county a more exciting place for them to live
3. Creative Economy – we will build a stronger and more visible creative economy supported by the development and retention of creative and entrepreneurial talent
4. Rural engagement – we will increase participation in arts and heritage, and promote inclusion in cultural and creative activity within our dispersed and rural county.

### How will we deliver these aims?

A number of cross-cutting themes that align well with the current policy and funding context will be usefully and effectively mapped on to our aims, and will be used as criteria for evaluating and developing projects and activities.

1. Partnership – effective collaborative working, information sharing and action is the fundamental key to making best use of resources, taking in both public and private sector partners: the Herefordshire Cultural Partnership will play an important role in supporting this.
2. Economic Growth – prosperity and the development of new and digital technologies will be the key to attracting and retaining people in the county, and in turn providing support for the cultural activities we aim to develop; mapping of existing provision and activity will be key to evidencing the value of the cultural sector to the County

3. Health and Well Being – exciting and engaging cultural activities support better lives, and we should recognise and use this explicitly in our aims and funding bids
4. Inclusion - providing opportunities for those currently excluded by the rural context of Herefordshire, and in particular to help address the glaring demographic age imbalance across the county
5. Lifelong Learning – increased educational and training opportunities are key to attracting and retaining young people and in supporting economic development: the university will be fundamental in making major changes to opportunities within the county.

### Immediate actions

1. Engage and consult with a wider range of people and in particular engage more young people with developing the Cultural Strategy and in strengthening and making more representative the Cultural Partnership.
2. Discuss and agree the vision and priorities for the strategy based on those proposed above.
3. Establish the extent and base of cultural and creative activity and potential, and map existing activity.
4. Agree and support a short list of Big Ideas – strategic projects that will contribute towards delivering the 10-year vision.
5. Draft and circulate final strategy, together with Action Plan
6. Launch Cultural Strategy at Herefordshire Culture Conference March 2018

**Big Ideas** - will emerge from consultation, but some to consider might include:

1. **County of Culture** – our UK CoC bid was unsuccessful this time, but produced a wide range of positive and exciting proposals that should be followed up and delivered as resources permit. The HCP’s role might initially be to provide coordination and sharing of information as well as support for funding bids.
2. **Festivals** – the wide range of existing festivals across Herefordshire could be jointly supported and extended, perhaps through the development of a framework that could both promote and add additional resources while developing new festival proposals for delivery by members of the partnership.
3. **Cultural Quarter** – the future of our city library, museum and art gallery could form the basis for an ambitious cultural quarter in Hereford and we should work to support a great outcome, perhaps in collaboration with the university’s development.
4. **Creative Workspaces** – the spaces exist and are not hugely resource intensive to provide, and by working in partnership these could be delivered to genuinely enhance and strengthen the creative and tourist economy. A range of infrastructural needs to support creative practitioners also exists, from display and gallery to rehearsal and performance spaces. A ‘hub and spoke’ model could provide well-connected infrastructure across the county.
5. **Digital Connections** – the County urgently needs to harness the power of digital technology to address the challenges of social, cultural and economic inequality. A ‘digital first’ cultural strategy aligned with the further development of universal broadband access and supported by a Digital Media Hub would combine creativity and technology, enabling the county to push past its geographical restraints, better able to present itself nationally and globally.

### Suggested consultation questions:

1. Are there any major omissions that you would like to add in terms of Herefordshire’s cultural needs in the findings of the research report ‘Looking to Herefordshire’s Creative and Cultural Future’?



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(available [www.herefordshireculturalpartnership.co.uk](http://www.herefordshireculturalpartnership.co.uk) )

2. Are you in agreement with the Vision Statement? Would you like to see any amendments?
3. Are you in agreement with our proposed four prioritised aims for the Cultural Strategy? If not, can you propose others (we are aiming to go forward with a very small number of key priorities in order to focus our efforts)?
4. Do you think the proposed cross-cutting themes are the right ones on which to base any projects and activities? Are there others you would suggest?
5. Should we be doing something else straight away, and how can we best achieve some of these things such as becoming more representative and inclusive?
6. Are these Big Ideas the best, most appropriate and most feasible ones to make a difference to Herefordshire? Can you argue for others? Would you help to make them happen?

We welcome your suggestions, ideas and proposals.

### **Herefordshire Cultural Partnership (HCP)**

The Herefordshire Cultural Partnership (HCP) was initially formed in 2015 to lead Herefordshire's bid to become UK City of Culture 2021. Despite an energetic and distinctive campaign Herefordshire did not make the shortlist. However the City of Culture bid process demonstrated an outstanding measure of partnership and collaboration working at its best. It also generated wide public support for a more ambitious approach to cultural development across the County.

Already HCP has won significant investment (£900k) through the Great Place Scheme <https://www.greatplacescheme.org.uk/> to pilot over three years new approaches that enable cultural and community groups to work more closely together and to place heritage at the heart of local communities.

Herefordshire's cultural landscape comprises a remarkable and rich range of arts and heritage activity, buildings, organisations, and natural assets. Through creation of a vision and cultural strategy for the County HCP aims to support and grow the cultural sector, enabling more people who live, work or visit this beautiful County.

To view this Summary and a copy of *Looking to Herefordshire's Creative and Cultural Future* visit [www.herefordshireculturalpartnership.co.uk](http://www.herefordshireculturalpartnership.co.uk)

For further information:

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## A4 Source material: primary documents and consultees

P+P is confident that it has considered all material directly pertinent to the future resilience of the museum service.

Over the course of this study P+P has consulted with forty+ individuals on either a face-to-face, group or workshop basis, and has considered and examined well over a hundred reports, submissions, documents and websites, the most significant of which have been recorded by way of footnotes in this report.

In addition, reference was made to the following documents:

Collections Policy 2016

Care and Conservation Policy and Plan 2016

Documentation Policy and Plan 2016

Archaeological Deposition Policy 2016

Loans Policy 2016

Hereford Orphaned Collections Report 2016

Reproduction Fees 2016

Human Remains Policy 2016

Documentation Manual 2016

Image Reproduction Guidelines 2016

Hereford Museum service Forward Plan 2016-2019

Emergency Disaster Plan 2016

Museum and Archive Service Final Report (10 March 2016)

Environmental Policy 2016

Success Policy 2016

Staff Structure 2016

Staff Skills and Experience 2016

Monitoring Information 2016

Various Budgeting and Financial Forecasts Spreadsheets (x4)

Various Visitor Figures Spreadsheets (x8)

Various Cabinet Papers (x4) and their supporting documents

Handling Plan 2016-2019

Handling Policy 2016-2019

Learning Plan 2016-2019

Learning Policy 2016-2019

Access Plan 2016-2019

Access Policy 2016-2019

Disability Access Audit for MRLC

Exhibition Policy

Full Fundraising Case for 31 Broad Street

Outline Fundraising Case for 31 Broad Street

Feasibility Study Final Report (6 July 2017) for 31 Broad Street

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Full Fundraising Report (2 July 2017) for 31 Broad Street  
The 31 Broad Street Project: Strategic Outline Case (V5; 9 July 2017)  
31 Broad Street Feasibility Study Executive Summary  
31 Broad Street Feasibility Study Financial Models  
31 Broad Street Financial Case

The McGowan Report on the future of the MLA (February 2016)  
Final Service Design: Museum Service (Natalia Silver, February 2017)  
The MLA Peer Review and Challenge (May 2017)  
Proposals by the Hereford Library Users Group for the Rankin Centre (31 Broad Street)

Herefordshire Council: Tender Specification for the Operation of Herefordshire Museum Service including Hereford Art Gallery and Museum, Old House (Hereford) and the Museum Resource and Learning Centre. September 2014

Invest Herefordshire: Economic Development Strategy  
Herefordshire Council Corporate Plan 2016-2020  
Resilient Heritage Application: Project Plan  
Ian Lawley (2015) Local Authority Museums and the modernising agenda in England  
The National Archives (2014) In a Spin

Broad Street Development Group (2017) Realising Hereford's Potential  
Herefordshire Museum Service Support Group (HMSSG): Briefing Note (2017)  
Stevens & Associates (2010) A tourism strategy for Herefordshire 2010-2015  
Herefordshire Cultural Asset Network (HCAN): Building a sustainable future for Herefordshire's cultural assets (2017)  
Countries of Culture Inquiry – submission by the Friends of Herefordshire Museums and Arts  
Herefordshire Council, Museum Plan 2017-2012  
Response to the LGA Peer Review of Museums, Libraries and Archives and associated papers 2017

## Consultees

Many people gave of their time freely to engage with this study from all aspects of the cultural life of Herefordshire. We are grateful for their contribution and acknowledge their determination to see the museum service progress and succeed.

Name	Organisation	Workshop
Jane Adams	Herefordshire Museum Service Support Group and the 31 Broad Street Development Group	✓
Jackie Addis	Herefordshire Museum Service Support Group	✓
Shaun Cambers	Hoople	
Jon Chedgzoy	Herefordshire Council	
Sarah Chedgzoy	Herefordshire Museum Service	✓
Margaret Coldman	Herefordshire Council	✓
Annabelle Elletson	Consultant	✓
Karl Ford	Hoople	
Geoff Hughes	Herefordshire Council	
John Hitchin	Herefordshire Library Users Group	✓
Nichola Geeson	Herefordshire Museum Service Support Group	✓
Miriam Griffiths	Herefordshire Museum Service Support Group	✓
Rachel Jones	Herefordshire Council	
Joe Kendrick	Herefordshire Museum Service	✓
Stephen Kerry	Hereford City Council	
Mathew Knight	Herefordshire Council	
Janusz Kozinski	NMiTE	
David Marshall	Cider Museum	
Michael McBratney	Rural Media – Great Place	
Althea McKenzie	Herefordshire Museum Service	✓
Hannah McSherry	Herefordshire Council	✓
Fleur Messer	Herefordshire Museum Service Support Group	✓
Nic Millington	Rural Media	
Roger Morgan	The Courtyard	
Ben Moule	Herefordshire Museum Service	✓
Jan Nesaratnam	Herefordshire Council	✓
CLlr Roger Phillips	Herefordshire Council	
Julia Radburn	Herefordshire Museum Service	✓
Scott Rolfe	Halo	
Kate Seekings	Herefordshire Museum Service Support Group and the 31 Broad Street Development Group	✓
Natalia Silver	Herefordshire Council	
Nick Simon	Herefordshire Museum Service	
Richard Smith	Friends of Herefordshire Archives	
Judy Stevenson	Herefordshire Museum Service	✓
Tom Taysom	Herefordshire Museum Service	
David Whitehead	Woolhope Club	
Catherine Willson	Herefordshire Museum Service	✓

✓ Indicates those present at the Planning and Development Workshop managed by P+P and held at the MRLC on Wednesday, 18 October 2017.