

# **The Impacts of Austerity on Local Authority Museums in England**

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**Thesis Submitted for the Degree of Doctor of  
Philosophy**

**UCL Institute of Archaeology**

**September 2017**

## **Declaration**

I, Nadia Meredith Marks, confirm that the work presented in this thesis is my own. Where information has been derived from other sources, I confirm that this has been indicated in the thesis.

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# Impact Statement

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This thesis is about the ongoing real-world challenge of managing museums in a climate of fiscal austerity. In evaluating responses to the situation it has clear value outside of academia as a resource for a sector enduring change. It demonstrates strategies in use and their impact, giving museum managers options to consider. It suggests directions for grant and training programmes through which sectoral bodies can support museums. Further, it provides evidence for lobbying policy makers: demonstrating the impact of policy on the state of the sector, estimating the sector's future outlook based on the continuation of current policy, and proposing alternative policy.

These impacts can be realised by sharing the findings with the sector through participating in sectoral conferences and networks. The thesis identified formal and informal forums through which museums support each other and share experiences, and these would be ideal settings to share practical examples from the findings. There are publications that bridge the academic and professional divide, such as the *Museums Journal*, and publishing findings in these would provide broad and accessible distribution. Finally, supporting bodies such as ACE and HLF should be provided with a report of the findings with focus on their role.

Within academia, this thesis provides a rigorous analysis of a period in time, providing a starting point for and enabling comparison with future scholarship. It contributes to a gap in the literature: prior to this thesis there was limited literature on the relationship between museum funding and museum behaviour, making it difficult to predict the impact of changes in museum funding on museum activities and values. This thesis provides a rare practical exploration of museum economics theory. These impacts should be addressed through publishing articles in academic journals and presenting at conferences.

# Abstract

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This project studies the impacts of the ongoing government policy of austerity on Local Authority Museums in England. I undertook a comprehensive and systematic survey of the impact of austerity on LAMs in order to understand the nature and scale of the situation, and to evaluate different strategies for responding to it.

Ongoing fiscal austerity in the public sector is causing budget cuts for LAMs and while they have continually struggled financially the situation may exacerbate the issue. Existing sectoral studies of the situation lack depth and there is limited academic literature to help build an expectation of the impact of changes in museum funding on museum values and activities. This study clarifies how LAMs are reacting to funding cuts in terms of income diversification, governance and management, and considers the impact of any developments on museum values and activities. It therefore provides enhanced understanding of the relationship between museum funding and museum operations and practical exploration of museum economics theory. Further, by analysing the consequences of this economic fall-out, this study learns from the ongoing public finance situation to provide strategies for future resilience, establishing an evaluative resource of enduring value to the sector.

Key findings of this thesis include a clear difference between LAMs that engaged within their LAs and those that are geographically, hierarchically or culturally distant from the LA. While both received budget cuts, the former showed greater understanding of the situation and their contribution to it, and demonstrated a more active response. A further finding is that LAMs must act opportunistically, but due to risk-averse LA bureaucracy and budget paucity lack the organisational agility to do so. However, I argue that the current wealth of HLF funding is creating a relatively benign environment for LAMs that hides the need for innovative, sustained change.

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# Abbreviations

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ACE - Arts Council England  
AMC - Area Museum Council  
CCT - Compulsory Competitive Tendering  
CIMS - Colchester and Ipswich Museums Service  
CV - Contingent Valuation  
DCMS - Department for Culture, Media and Sport  
EIA - Economic Impact Assessment  
FOI - Freedom of Information  
GDP - Gross Domestic Product  
GLLAM - Group for Large Local Authority Museums  
HLF - Heritage Lottery Fund  
IMF - International Monetary Fund  
LA - Local Authority  
LAM - Local Authority Museum  
MA - Museums Association  
MGC - Museums and Galleries Commission  
MLA - Museums Libraries and Archives Council  
NAO - National Audit Office  
NMDC - National Museums Directors Council  
ONS - Office for National Statistics  
TWAM - Tyne and Wear Archives and Museums  
V&A - Victoria and Albert Museum

# 1 Introduction

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This thesis examines the impacts of the ongoing government policy of fiscal austerity on Local Authority Museums (LAMs) in England. It presents a comprehensive and systematic survey of how LAMs are reacting to reductions in public funding, using quantitative analysis, organisational documentation, and staff interviews. It aims to understand the nature and scale of the situation, and to evaluate different strategies for responding to it, ultimately proposing strategies for future resilience

A key finding of this thesis is that there is a clear difference in response to austerity between LAMs that are engaged within their Local Authority (LA) and those that are geographically, hierarchically or culturally distant from the LA. While both received budget cuts, the former showed greater understanding of the LA's situation and their contribution to it, and demonstrated a more active response to austerity. The latter lacked connection to the LA's aims and objectives, felt misunderstood, and lacked support to make changes. As such, while being engaged within the LA does not mean that LA subsidy is secure, it is associated with increased activity leading to grants and self-generated income, and therefore helps keep the museum operational.

A further finding is that LAMs must take all opportunities for external funding and earned income and offer prominent public programmes, temporary exhibitions, and high profile developments, in order to maintain public support and visibility within the LA. In doing so, they risk creating incoherent services and neglecting core functions, jeopardising ongoing resilience. The strategy must be to exploit their popular and commercial offer in order to maintain the aspects of museums that are valued for existing but not actively used, namely collections.

## 1.1 Scope and Research Aims

The Oxford English Dictionary defines austerity as:

Difficult economic conditions created by government measures to reduce public expenditure (Oxford Dictionaries, 2018)

This provides a working definition: since 2010, the UK government has pursued a policy of reducing public spending year by year in order to reduce their budget deficit. They have reduced their grants to LAs who have had to reduce their expenditure on their services, including LAMs. It is the impact of this situation that is investigated in this thesis.

However, the ideological nature of austerity warrants closer interrogation. Fiscal austerity has been considered the answer to different problems in different countries (Mitchell 2013, 454). In the UK it was based on the global financial crisis that was recognised in 2007. The crisis was in the private sector and the issue for the public sector was economic: how should the banks and markets be stabilised? Austerity represents a transformation of this economic problem into a political opportunity, whereby politicians fought to apportion blame for the crisis (Clark and Newman 2012, 300; Gamble 2015, 43). The Conservatives blamed the excesses of the public sector and the welfare state.

Their version of austerity can be termed 'expansionary fiscal contraction', in that it is based on contraction of the public sector to allow expansion of the private sector (Mitchell 2013, 454). It was presented as a 'virtuous necessity': a necessity as it was economically unavoidable, that public services were in excess of what could be afforded; virtuous as it was morally right for everyone to do their part and be responsible for bettering society (Clarke and Newman 2012, 312). It is this rhetoric in particular that is relevant in this thesis as LAMs are tasked with doing their part to reduce public spending and increase both their relationships with public sector and responsible individuals.

This thesis examines LAMs between January 2008, at the onset of the economic crisis but before the initiation of austerity, and December 2016. The terminal date was dictated by the length of a PhD and therefore does not represent the end of austerity. As such, this thesis presents an in-depth analysis of the initial period of austerity and can be usefully compared with studies of what comes next, or the onset of a subsequent period of reduced public funding.

Included in this study are museums that in January 2008 were governed and managed by LAs, whether alone or in partnership. As such, museums that were run by LAs in 2008 but had been devolved by 2016 are included. Museums that are provided jointly by more than one LA are included. It does not include museums where the LA provides financial support, support services, or has a role in governance, but where management is undertaken by another body: the staff of the museum must be employed by an LA.

The impacts of interest in this study are broad. Initially of interest are changes in LA spending on LAMs, representing the direct impact of the government policy of austerity. Secondly, indirect financial impacts are sought, as changes in expenditure across the public, private, and third sectors may affect LAMs. Together, these describe the

financial environment within which LAMs are operating and provide a foundation for the study. Interest, then, turns to coping strategies, starting with structural changes in management and governance and continuing to daily operations. Critically, this will be compared to valuations of the museums, from both the perspectives of the LAs and the LAMs: in terms of proposing strategies for the future resilience of LAMs, this study is important because museums have value to society, and therefore we must consider whether their value is eroded or otherwise changes due to responses to austerity.

The rationale for this focus is discussed in Chapter Four: existing literature shows that theory and practice about the impact of different funding sources on museum behaviour has not been adequately explored. There is limited literature with which to build an expectation of the impact of changes in museum funding on museum activities and values. The project's main original contribution to knowledge will be enhanced understanding of the relationship between museum funding and museum operations and practical exploration of museum economics theory.

Not included in this study are the visitor and community perspectives. These perspectives of the value of museums are important, but to understand them would require additional research methods to those appropriate for investigating the LA and LAM perspectives. This would be more appropriately investigated in a separate study, as to include it here would dilute the depth of the analysis feasible within the constraints of a PhD thesis. This is proposed as further research that would complement this study.

### ***1.1.1 Research Questions***

My research questions are:

1. How has government austerity affected local authority museums in England? How does it continue to affect them?
2. How have these museums reacted, or plan on reacting, to these effects? What strategies have they adopted?
3. How effective have these strategies proved to be so far?

The first two questions consider the nature and scale of the impact of austerity on LAMs. I show in Chapter Three that existing studies report that LAMs are weathering cuts in their LA funding, are making changes to their activities in order to spend less, and are working to generate income from other sources. In Chapter Four I explore the theoretical requirement for a museum to receive subsidy. I then consider museum economics and organisational behaviour theory and find that funding sources and

governance arrangements have an impact on the activities and values of a museum. Answering these two questions provides more detail on the situation for LAMs and sheds light on the relationships between stakeholders, funding, functions and values.

Question three is evaluative. It explores museums as organisations, using the evidence generated to assess how funding sources, stakeholders, functions and values contribute to organisational sustainability and resilience. It also considers what this means in terms of the theoretical constructions of what museums should be, what they should do and what values they should hold.

### ***1.1.2 Research Methods***

To answer these questions I undertook research at different levels of detail, starting with publicly available financial data and working towards detailed quantitative and qualitative evaluations of the situation in case study museums. Data sought included the museums' income sources and spending over time, organisational documentation on objectives, management plans, governance arrangements and activities. At case study museums, this was supplemented by semi-structured interviews with staff at all levels to provide context and rationale, and explore how austerity measures have been implemented and received in practice.

## **1.2 Background**

### ***1.2.1 The Financial Crisis and Fiscal Austerity in the UK***

The economic crisis under investigation became apparent in 2007 and spread to affect most of the major economic powers of the world. Banks such as Northern Rock announced major losses that have been attributed to excessive risk-taking in the sector (Gamble, 2014: 53; Hindmoor and McConnell, 2015: 69–70; Kingsley, 2012: 3; Lybeck, 2011: 29–94; United Nations and United Nations Conference on Trade and Development, 2008: iii). However, banks had become 'too big to fail' and received government rescue packages to prevent the collapse of the financial system (Gamble, 2014: 54–59; Hindmoor and McConnell 2015: 69-70; Lybeck, 2011: 16, 29; Mullard, 2011: 50).

Following the financial crisis came recession: In the UK, the economy contracted by 6.4% between the first quarter of 2008 and the second quarter of 2009, compared to 5.9% on average across the European Union, with further effects including higher unemployment, lower private consumption and falling living standards (Clark and



Heath, 2014: 71–80; Gamble, 2014: 61; Hülsman, 2011: 23–26; Joyce and Sibieta, 2012: 2–9, 24; OECD, 2018). Further, the rescue packages dramatically increased sovereign debt and concerned by uncertainty over how much debt a government can feasibly take on, government focus moved from stabilising the financial sector to dealing with sovereign debt (Gamble, 2014: 61; Kickert, 2012: 300; Langley, 2015: 147; Mullard, 2011: 45; Rhodes, 2010: 24).

For the UK government, the recession led to the largest peacetime budget deficit in history (HM Treasury, 2010: 5). Tax revenues decreased while welfare payments increased, which in combination with the costs of bank bailouts and the deficit spending by the Labour government, made public spending and sovereign debt appear a problem (Bailey et al., 2015: 572; Langley, 2015: 146). Coming to power as part of the Coalition government in 2010, the Conservative leadership undertook a spending review which was published in October of that year. The spending review outlined their plans for fiscal austerity; reducing government spending to reduce the budget deficit as a strategy for sustained economic growth (HM Treasury, 2010: 5).

As a result of the initial comprehensive spending review LAs faced an estimated 37% real-terms cut, and this policy continued after the 2015 election with a further 56% reduction in central government grant funding announced (Lowndes and Gardner, 2016: 358; National Audit Office, 2014b: 4, 2016: 5). With less income, LAs have had to cut their spending. As discretionary services, LAMs are especially at risk as LAs try to budget to preserve statutory services. As a result, LAMs have been weathering cuts in public funding (Evans, 2012: 7; Newman and Tourle, 2011: 7).

### ***1.2.2 Museums, Subsidy and Austerity***

Traditionally, museums in the UK have received subsidy to support their operations and this is needed because they have characteristics that cause market failure. Firstly, they have benefits beyond those derived directly by visitors, meaning that they are enjoyed by individuals who are not paying for them through the market. Advocates argue that museums are intrinsically beneficial to society and therefore should be supplied beyond the amount that can be supported by paying visitors (Frey and Meier, 2006b: 1022). They also have high fixed costs, those that must be paid independent of the level of activity. For example, a museum must continue to pay to store and care for its collection even if the number of visitors goes down.

This theory suggests that the current landscape of LAMs will not be sustainable with reduced public funding. Some museums may be able to operate in the market as a niche product, covering high fixed costs through high entry fees to a small number of

visitors (Frey, 2000: 11; Frey and Meier, 2006b: 1034). Further, there are other sources of subsidy including private benefactors, charitable organisations, and corporate sponsors, that LAMs may be able to utilise.

However, finances have been a constant concern for LAMs, and they have been under pressure since the 1980s to diversify their income sources beyond public subsidy. The literature suggests that changes in the sector have been slow (e.g Darnell et al., 1998: 78). Some commentators argue that the climate in which publicly funded cultural organisations, such as LAMs, operate has been fairly benign, and that museum managers feel that museums will always be rescued if they have financial difficulties, meaning that they have lacked incentive to diversify their funding streams (Andreoni and Payne, 2003: 793; Babbidge, 2006: 1–3; Bakhshi and Throsby, 2010: 10; Méndez-Carbajo and Stanzola, 2008: 168; Stanzola, 2011: 114–119). Certainly, while LAMs have closed due to financial difficulties and complaints about funding have continued throughout their history, the sector has survived overall.

The ongoing fiscal situation has the potential to exacerbate the issue of public funding for LAMs. Pratley argues that arts organisations are now aware that there is no public safety net if they get into financial difficulties (Pratley, 2015: 67). One would therefore expect an increased rate of change as LAMs make arrangements to cope with reduced public funding. However, organisational change is particularly difficult for LAMs. As part of local government they have limited independence and are bound by bureaucracy that makes decision making slow and avoids risks (Thompson, 2003: 230; van der Voet, 2014: 376; Weinberg and Lewis, 2009: 262). As part of the wider museums sector they are bound by professional standards and norms that hinder change (Hatton, 2012: 142; Stanzola and Méndez-Carbajo, 2011: 245; Thompson, 2003: 236–237). Austerity demands that LAMs seek efficiency and therefore precludes the maintenance of the slack associated with agile organisations able to respond to challenges in their environment (Teece et al., 2016: 24).

Where LAMs do manage to change, there is limited literature available to allow for prediction of the impacts. For example, academic literature claims that that public museums are able to design activities to appeal to niche demographics and have little incentive to consider public preferences (Camarero et al., 2011: 255; Frey and Meier, 2006b: 1030–1031; Towse, 2002: 13). In contrast, policies directed at LAMs have been dominated by quantitative performance measures, suggesting that they have to attract as many visitors as possible and therefore have to appeal to a wide audience and consider public preferences. In this regard, existing literature about the organisational behaviour of museums is lacking, tending to distinguish between publicly funded

museums, charitable museums, and commercial enterprises, when few museums operate solely in one of these categories. They tend to be 'multi-product' firms and 'hybrid' organisations: they have public and philanthropic aspects, offer intangible products and have intrinsic value, but they also have commercial aspects, offering facilities and services for which a fee can be charged (Hatton, 2012: 138–139; Rosenstein, 2010: 451). This study works to address this gap in the literature.

### **1.3 Existing Studies of Local Authority Museums in Austerity**

There are existing studies of the impact of austerity on LAMs. They will be discussed in more detail in Chapter Three. The Museums Association (MA) have completed a survey each year since 2011 that asks museums to report their level of cuts, the effect on staffing and changes in activities. They show a trend for budget cuts and reduced LAM services (Evans, 2012, 2013, Museums Association, 2014, 2015; Newman and Tourle, 2011). The reports of these surveys are mostly quantitative with some qualitative commentary. However, not all data are reported separately for the subset of LAMs and the reporting does not enable analysis of cumulative cuts across the years of the survey.

The Local Government Association carried out a survey of LAMs in September 2016 in order to submit evidence for the Department for Culture, Media and Sport's (DCMS) review of Museums. They contacted heads of cultural services and had 83 responses to an online survey (Local Government Association, 2016). Their results are similar to the MA, finding reduced budgets leading to reduced staffing and opening hours (Local Government Association, 2016: 8). As with the MA survey, this study lacks detail.

Arts Council England (ACE) commissioned a more in-depth study that comprised a literature review, analysis of Department for Communities and Local Government data, and consultation with 20 LAMs (TBR et al., 2015). The report found that while LAMs were largely surviving and often increasing their income from other sources, services had been 'hollowed out' (TBR et al., 2015: 9). The report made a number of recommendations for managers and decision-makers, and the findings should be compared with those of this study.

### **1.4 Structure of the Thesis**

This thesis is structured so that each chapter builds on the previous producing a comprehensive account of LAMs through history and through austerity. Following this introductory chapter, the next three chapters comprise the findings of a thorough

literature review. Chapter Five covers the methods and methodology used to gather and analyse data, and is followed by the analysis results. The final chapter contains a discussion of the results and final conclusions.

**Chapter Two** covers the development of LAMs in England, chronologically tracing significant policy and legislation to identify the factors that influenced the development of the organisational structures LAMs operated under as they began to deal with fiscal austerity in 2010. It highlights the themes that emerge, showing aspects of both consistency and change for LAMs, providing context within which to analyse the response to austerity and themes that will be key in later chapters.

**Chapter Three** describes the economic situation in England to provide further context for my research. It briefly summarises the events that lead to the economic crisis, and explains the theory behind the policy of fiscal austerity. This introduces the concepts in order to understand the political and economic climate that LAMs are operating in. This chapter then explores how this policy has affected local authorities before introducing the existing research on how LAMs have been affected.

Traditionally, museums in the UK have received some sort of subsidy to support their operations. **Chapter Four** explores the rationale for subsidy through cultural economic theory both in terms of why it is desired and why it is required, and finds that the current level of museum provision cannot be sustained without subsidy. It therefore theorises the impacts of austerity in terms of organisational change, covering the barriers to change and challenges faced by LAMs, and considers how different forms of subsidy influence the behaviour and values of museums.

While the earlier chapters comprised a thorough review of existing literature, the majority of the thesis was informed by organisational documentation and original interviews. **Chapter Five**, then, describes and defends the comprehensive data collection and analysis methods used.

**Chapter Six** presents the results of Phase One: a quantitative national overview of LAMs. It comprises a statistical analysis of data collected for all LAs in England to define the population of LAMs and create an overview of the structural features of the impact of austerity upon them. It begins by looking at LAMs prior to the financial crisis in order to understand the starting point for the study and then quantifies the impacts of austerity on LAM finances and governance.

**Chapter Seven** presents initial findings of the data collected in Phases Two and Three of the study through organisational documentation and interviews. It establishes a foundation for the analysis in the following chapters by introducing 19 case studies and

summarising key points about the nature and impact of austerity for them. It provides a starting point for evaluating methods for coping with cuts. Also using the findings of Phases Two and Three, **Chapter Eight** explores the nature of museums within local authorities, drawing out benefits and drawbacks of being part of local government and the influence of policy on museum operations. This enables understanding of how being an LAM shapes the response to fiscal austerity.

Chapters Nine and Ten focus on exploring and evaluating the methods used to cope with cuts by the case studies. **Chapter Nine** looks at the governance, management and operations of the sampled LAMs, analysing organisational structure, strategy, and activities in terms of the sampled LAMs' response to austerity. It considers the impact and efficacy of the strategies utilised by the case studies. **Chapter Ten** explores the sources of income being utilised by LAMs and their relative importance in the sampled cases. It discusses the potential of different sources in comparison to their current use, and the implications and obstacles associated with them.

**Chapter Eleven** returns to the original research questions of the project. It collates and summarises the findings detailed in previous chapters to identify key themes and generate conclusions. This chapter also explores possibilities for further work.

## 2 History of Local Authority Museums in England

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This chapter covers the development of LAMs in England. I chronologically trace the policy and legislation that shaped them to identify the factors that influenced the development of various organisational structures LAMs operated under as they began to deal with fiscal austerity in 2010. By providing this context, I will be better able to analyse the response to austerity as I investigate it in later chapters.

I begin with the establishment of the first LAMs in the mid-19<sup>th</sup> century and follow successive governments and developments in public policy, as directed towards LAs, until I reach the 1997-2010 Labour government. I finish by highlighting key themes that emerge through the discussion. In later chapters, the impact of austerity on these themes will be analysed.

I show in this chapter that since the end of the Second World War, the central government has been generally prescriptive about what LAs do, how they do it and how much they spend. This has been achieved directly, for example, by setting targets; or indirectly, by imposing spending controls. Between 1979 and 1996 there were 140 major Acts of Parliament passed that affected LA structure, responsibilities and finances (Byrne, 1996: 15; Chandler, 2009: 189; John, 2014: 697; Leach and Percy-Smith, 2001: 65; Newman, 2014: 3293; Pipe, 2013: 4; Richards, 1983: 127; Stevenson et al., 2010: 161).

Despite the overall level of regulation, museum provision has always been a discretionary service for local government. The central government has continually taken the view that museum provision is entirely at the discretion of LAs (e.g. Department of National Heritage, 1996: 5–6). Debates in both the House of Commons and the House of Lords over time show continuity of this policy, with the common line being:

Local authorities are not required by statute to fund museum services. It is therefore not for government to tell elected local representatives how to take detailed local decisions. (Hansard, 1998).

This means that LAMs have, through ‘historical accident and tradition’ developed a variety of operational, financial and governance structures (Boylan, 2006: 211). Nonetheless, policy and legislation for LAs has impacted LAMs indirectly due to changes in priorities and in ideology over time. This is explored throughout the chapter.

## **2.1 The Origins of Modern Local Authorities and Local Authority Museums**

In the early 19<sup>th</sup> century, local government was minimal and ideologically unpopular, with charities and the private sector carrying the weight of local service provision instead (Leach and Percy-Smith, 2001: 47; McLaughlin and Osborne, 2002: 7). However, industrialisation and urbanisation generated social change and a series of public crises, such as cholera epidemics in 1831 and 1847, fuelled the recognition that the state had a role in delivering some public services, like housing and healthcare (Clarke, 1955: 46–50; Millward and Sheard, 1995: 501; Wollmann, 2000: 34). Responses to such crises contributed to the growth of local authorities in an ad hoc manner throughout this century, before rationalisation in the 1880s and 1890s brought a degree of uniformity to the system (Clarke, 1955: 49–50).

Local Authorities were first legislatively empowered to operate museums in 1845. The earliest museums taken over by LAs include those in Sunderland in 1846, Leicester in 1849, Ipswich in the 1850s and Birmingham in the 1860s (Standing Commission on Museums and Galleries, 1963: 3). Many were created from private collections founded by scientific and historic societies that were transferred to local government control. The rationale for public provision of museums was related to their educational value and 'civilising effect' (Boylan, 1986: 3; Kawashima, 1997: 17; Miers, 1928: 7–8).

### ***2.1.1 Local Authority Museums in the Early 20<sup>th</sup> Century***

Museum provision was not mandatory for LAs and development tended to depend upon private benefactors. As such, despite approximately 20 new museums opening each year in the 1930s, the process was uncoordinated and the distribution of museums across the country was haphazard and without correlation to population (Bailey, 1922: 90–91; Markham, 1938: 15; Miers, 1928: 14; Nature, 1922: 761).

Finance was an issue for early LAMs: private benefactors tended to provide capital to open or develop a museum, but the funds needed to operate were often not adequately taken into consideration. Markham reports that around 50 museums closed in the 1930s in the run-up to his 1938 survey of public museums (Markham, 1938: 5).

Quality was also variable and often depended on the involvement of a committed individual. LAMs were usually governed by a museum committee or joint museum and library committee, but these had low status within LAs meaning that they often lacked expertise and enthusiasm from their members (Standing Commission on Museums and Galleries, 1963: 36–38). Curators were often librarians, or it was an honorary role,

meaning that individual enthusiasm and skill varied and greatly impacted the quality of displays and services (Markham, 1938: 22, 55; Miers, 1928: 16, 20). Due to the collections often originating as private assemblages of curios they tended to be 'heterogeneous jumbles', and collections tended to grow through donations that museums did not feel they could politely refuse even if the items were inappropriate. As such, LAMs tended to be generalist museums, lacking connection to their localities. (Haward, 1922: 10; Maltby, 1932: 5–6; Markham, 1938: 48; Miers, 1928: 24, 38–41).

The culmination of these factors meant that while there were successful and inspiring museums, there were more that were poorly staffed and apathetically governed (Nature, 1922: 761). Overall, the picture was of inequality of museum provision across the country despite rapid growth in the sector.

### *The Royal Commission on National Museums and Galleries*

Commentary in the journal Nature showed discontent about the uncoordinated nature of provincial museums, (Nature, 1922: 761). Nature saw the situation as causing a:

[...] waste of material, waste of money, and waste of effort that are consequences of overlapping, competition, lack of co-ordination, inappropriate administration, unequal distribution of funds, and all the other evils inherent in this disorder. (Nature, 1922: 761).

In his report commissioned by the Carnegie United Kingdom Trust, Miers called for external stimulus in order to develop a similar level of access and service across the country (Miers, 1928: 55). Markham came to a similar conclusion 10 years later (Markham, 1938).

A number of small-scale ventures developed during the period that aimed to address the issues. There were regional museums federations, including a skill-sharing and discussion forum for curators in the North West. The Victoria and Albert Museum (V&A) established a circulation department in 1908 that provided art for educational purposes outside of London. A small grant scheme was administered by the Carnegie United Kingdom Trust. All were considered valuable by sectoral commentators and government reports; the latter due to there being so few other options for capital grants (Davison, 1933: 379–385; Miers, 1928: 27, 55; Royal Commission on National Museums & Galleries, 1929: 25–29; Standing Commission on Museums and Galleries, 1970: 26).

The Royal Commission on National Museums and Galleries was established in 1927 with a primary focus on national museums (Babbidge, 2005: 15). The Commission's



remit involved calculating the current costs of the institutions, predicting future costs and considering how costs could be limited while maintaining educational value, appropriate governance and management (Royal Commission on National Museums and Galleries, 1928: 3–5). However, the recommendations of the Commission did not reflect the economy requested in their terms: they argued that there were greater benefits to the national collections than were realised at time and that additional expenditure should be provided to extend their reach across the country (Royal Commission on National Museums and Galleries, 1928: 29). The Commission reported that co-operation between museums was lacking and that this stifled the exchange of ideas. They recommended closer relationships between the national museums and provincial museums and advised that this required a coordinating body (Royal Commission on National Museums & Galleries, 1929: 12–16, 24).

The nature of the body, however, was up for debate. A central government ministry suggested that all public museums should be subject to the Board of Education due to calls for central recognition and support based on the educational potential of regional museums. However, this arrangement was rejected by the sector, with the MA wanting recognition of the broader benefits of museums and the Commission wanting something less bureaucratic (Markham, 1938: 15, 17, 23; Miers, 1928: 34; Nature, 1922: 761–762; Royal Commission on National Museums & Galleries, 1929: 15). The Commission's eventual recommendation was for the creation of a Standing Commission on Museums and Galleries (Babbidge, 2005: 15–16; Royal Commission on National Museums & Galleries, 1929: 24). This was established in 1931, tasked with advising on museum issues, encouraging development and promoting co-operation between national and provincial museums (Feist and Hutchison, 1989: 68; Standing Commission on Museums and Galleries, 1948: 4)

## **2.2 The Welfare State**

In the aftermath of the Second World War there was pressing need for infrastructure to be reconstructed and for civic confidence to be renewed. With the public having grown used to a high level of government activity and spending due to years of war, government provision of services was more acceptable than it had been previously perceived. Some politicians argued that the prevailing mixture of public, private and third sector service provision was not sufficient due to being fragmented and uncoordinated (Leach, 2015: 115; Leach and Percy-Smith, 2001: 57; McLaughlin and Osborne, 2002: 8). The Labour government aimed for access to the same basic services for all, and thought that local government was best placed to ensure this in

some areas, with central provision better in others. As a result LAs become more involved in the provision of social and educational services and less in utilities and healthcare as these were nationalised to achieve economies of scale (Byrne, 1996: 14–15; Wollmann, 2000: 36). Overall, local government grew, with a 23% increase in expenditure between 1950 and 1970 (Byrne, 1996: 21).

### ***2.2.1 Local Authority Museums in the Welfare State***

While many museums necessarily closed during the World Wars, others found a role to play, providing educational services to children displaced from their schools and hosting exhibitions on topics related to the war effort (e.g. Haward, 1922; Museums Association, 1940; Stevens, 1940)). In the aftermath, museums gained in political prominence, seen as having a role in the revitalisation of civic pride. Related to the increasing importance of social and educational services in LAs, many local museums opened or grew, struggling to keep up with demand (Babbidge, 2005: 17; Davies and Selwood, 1998: 69; Lawley, 2003: 75–76; Standing Commission on Museums and Galleries, 1963: 5–6). Some large LAMs became a department of their own within the LA and were governed by a discrete committee with the senior museum officer holding a director level position (Boylan, 1986: 43; Standing Commission on Museums and Galleries, 1963: 36).

However, development was haphazard and financially fragile, meaning that regional inequality remained. Only a third of provincial museums had full-time curatorial or technical staff by 1973 and capital for development and acquisitions was lacking (Department of Education and Science, 1973: 2; Standing Commission on Museums and Galleries, 1963: 6, 47–48, 56–57). Museum committees continued to have low status within LAs and many LAMs were still managed jointly with library services (Boylan, 1986: 43; Museums Association, 1945; Standing Commission on Museums and Galleries, 1963: 36, 39). Boylan argued that these joint arrangements produced the worst performing museums and stifled their development (Boylan, 1986: 43).

### ***2.2.2 The Standing Commission on Museums and Galleries and Area Museum Councils***

Though tasked with promoting co-operation between national and provincial museums, post-war the Standing Commission on Museums and Galleries focused their efforts on the national museums, reporting on their state and needs every 5 years (Standing Commission on Museums and Galleries, 1948, 1954, 1959). They did not address the

issue of regional museums in earnest until the 1963 Rosse Report (Babbidge, 2005: 4; Standing Commission on Museums and Galleries, 1963).

Alongside their work, there was increasing pressure on the Treasury to provide funds for regional museums, including from the MA and Carnegie United Kingdom Trust. The MA bemoaned the lack of interest in provincial museums from the central government, which it said caused the inadequate supply outside London (Museums Association, 1945: 4). They called for additional funds to extend services equitably across the country and applied pressure on the government to support local museums throughout the 1950s, requesting regional museum boards (Locke, 1983: 31). The MA firmed up their ideas and presented them in 1957, spurring debate that in 1959 established the Area Museum Council (AMC) for the South West supported by grants from the Calouste Gulbenkian Foundation and two other Trusts (Locke, 1983: 31). A three year trial project, the council was intended to encourage co-operation between museums in the region and initially focused on improving standards within the sector (Boylan, 1986: 22).

Alongside the trial, the Standing Commission on Museums and Galleries ordered a survey of local museums. It was hoped that this would show AMCs to be a good way for the Treasury to support local museums. The resultant report produced in 1963, the Rosse Report, concluded that more money was needed for provincial museums and while this was primarily the responsibility of LAs themselves, that central government had a role to play and that a financial contribution was the best means of showing support (Standing Commission on Museums and Galleries, 1963, 1965: 19). Their recommendation was for the creation of AMCs in all regions, financially supported by the Treasury (Babbidge, 2005: 20; Boylan, 1986: 23; Feist and Hutchison, 1989: 68; Locke, 1983).

The report also called for central co-ordination of loans and training, and for the national museums to be open to requests for support from provincial museums. However, it rejected the formally co-ordinated system in operation in Wales as being inappropriate due to larger scale of the sector in England, and did not recommend an alternative (Standing Commission on Museums and Galleries, 1963).<sup>1</sup>

All AMCs developed differently; by the 1980s some primarily managed a grant scheme while others delivered services that individual museums found too expensive to maintain, such as conservation labs (Boylan, 1986: 23; Department of Education and

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<sup>1</sup> By this time, local museums in Wales were affiliated with the national museums so that they could benefit from the facilities, resources and expertise of the larger institutions (Standing Commission on Museums and Galleries, 1948: 45).

Science, 1973: 3). The main constraint of the AMCs was financial: their central government grant was minimal, with it reported that they could distribute 25 times more capital funds than they had available (Museums and Galleries Commission, 1984: 73–74; Standing Commission on Museums and Galleries, 1967: 13). Nonetheless, while AMCs had low expenditure in comparison to the museum sector as a whole, they were often the only source of funding and support for improvements meaning that they influenced the development of the sector with an emphasis on the improvement of standards throughout their lifespan (Boylan, 1986: 25–26; Feist and Hutchison, 1989: 70). A 1997 review of the AMCs concluded that they should be retained as they were both valued by museums and of use to the Department of National Heritage in disseminating central policy (Pender, 1997: 5–8). AMCs were only abolished in 2001 in the face of strong opposition as the central supporting body for museums merged with that for libraries and archives, resulting in merged regional support as well (See Section 2.4.2) (Babbidge, 2005).

Other developments recommended by the Standing Commission on Museums and Galleries included repeating earlier calls from the Royal Commission on National Museums and Galleries for the extension of the circulation scheme at the V&A to other national museums, and for an increase of the purchase grant scheme, also administered by the V&A (Standing Commission on Museums and Galleries, 1959: 8–9). The purchase grant scheme for provincial museums, which provided grants to cover around half of the purchase cost, rose from £250k in 1962 to £1.6m in 1981 (Babbidge, 2005: 27; Standing Commission on Museums and Galleries, 1959: 3, 1965: 21, 1967: 14). Though the circulation scheme looked to be expanded, with the beginnings of the similar scheme at the Science Museum, the V&A department was disbanded in 1978 due to staffing cuts (Standing Commission on Museums and Galleries, 1965: 20, 1978: 27). Other recommendations appeared to go unheeded, such as their 20-year call for a ‘housing the museums fund’ similar to a scheme administered by the Arts Council (House of Commons Education, Science and Arts Committee, 1980: 414). The body was intended to be advisory only with no executive power, which limited its utility as commented by Lord Northfield:

It has no power at all and it certainly has no teeth. (Hansard, 1977)

### **2.2.3 Local Government Act 1972**

By the late 1960s there was a general consensus in central government that the system of LAs needed to change. The existing structure was thought to be outdated due to having been inherited from the 1800s, and public participation was low (Royal

Commission on Local Government in England, 1969: 1; Secretary of State for the Environment, 1971: 5). The Labour government appointed the Redcliffe Maud Commission to review the situation and their final report was published in 1969. Arguing that the current arrangement of LAs left services fragmented and responsibilities unclear, and that there were many LAs that were too small to exercise their duties robustly, the commission advocated a complete reorganisation. They called for unitary authorities in all areas providing all services, except for certain metropolitan areas where a single authority would be cumbersome large. This, they said, would enable efficient planning of services and would facilitate engagement with residents due to clear lines of responsibility (Royal Commission on Local Government in England, 1968: 1–3, 1969: 1–3).

However, the Labour government under which the report had been commissioned was dissolved before the recommendations could be enacted and the new Conservative government produced their own White Paper about the issue in which they instead called for two tiers of local government with county councils and district councils (Secretary of State for the Environment, 1971). Their argument was that there had to be balance between large authorities needed for efficiency of scale and small authorities needed to understand local nuances (Secretary of State for the Environment, 1971: 7). Though the eventual Local Government Act 1972 differed from the White Paper, it followed the principle by abolishing all existing borough and county councils in 1974 and establishing a new two-tier system (Keith-Lucas, 1977: 5).

Within the sector there had been hope that the reorganisation would help address inequality in museum provision. Following the Redcliffe-Maud report the MA called for museum services to become the responsibility of the unitary authorities, rather than the small local councils as the commission had proposed (Royal Commission on Local Government in England, 1969: 100; Scrutton, 1970: 107). With the regard to the eventual act, along with the Standing Commission on Museums and Galleries, they argued that only the top tier of local government should have responsibility for LAMs. They claimed that only the new county councils would have sufficient finances to sustain museums while also having a broader geographical reach that was appropriate for collections with more than local interest (Babbidge, 2005: 23; Boylan, 1986: 27; Scrutton, 1970: 107). They also hoped that museums services would be made statutory in the new system (Scrutton, 1970: 107). However, the resultant legislation allowed all tiers of LA to run museums, but did not oblige any to do so. Further, district councils lobbied for more powers and the museums managed by abolished LAs usually

passed to new district councils rather than the top-tier county councils (Boylan, 1986: 27; Paine, 1986: 5).

While the government argued that the system allowed LAs flexibility to make decisions about how to run their services, the result was that lines of responsibility were confusing and provision of services was often duplicated between tiers or lacking in both (Keith-Lucas and Richards, 1978: 237; Wood, 1976: 150, 157). For LAMs, this contributed to the variety of governance models that developed.

The MA hoped that county councils could be encouraged to voluntarily develop county-wide services in partnership with lower tier district councils with some success: by 1974, Leicester County Council had taken control of the museums in Leicester City as the new city council considered itself too small to finance them, and Norfolk Museums Service had been developed to cover the whole county (Cheetham, 1974: 27–28; White, 2014: 41). However, by the mid-1980s, LAs of a similar size and remit had completely different levels of museum expenditure. Some areas had services jointly governed by county and districts, others had a lower level of co-operation such as through sharing expensive services, while in others the tiers of LAs had completely separate services despite geographical overlap (Boylan, 1986: 28, 51; Paine, 1986: 5).

In advance of the act being finalised, the Conservative government commissioned the Bains Report to consider the internal structure of the new LAs. The report called for a corporate approach within local government but also flexibility for LAs to design their governance to suit them and flexibility for LAs to change to respond to changing priorities (Department of the Environment, 1972: 21, 32). One of the goals of the reorganisation had been to achieve economies of scale and as such the units within LAs became larger. The idea was that larger centralised units could be more efficient by providing services in an integrated and co-ordinated way, therefore reducing duplication of effort (Keith-Lucas and Richards, 1978: 239; Leach and Percy-Smith, 2001: 57–58). Bains also called for committees to be based on objectives rather than services (Department of the Environment, 1972: 124). For LAMs this often meant that they were downgraded in the hierarchy. LAMs that had previously been governed by a discrete museums committee were commonly positioned within a new leisure department and the senior museum officer placed at the third or fourth tier of hierarchy within the department. Though there was an increase in LAM staff, they had less access to elected officials and decision making than they had been used to (Babbidge, 2005: 24; Boylan, 1986: 44; Kawashima, 1999: 159; Lawley, 2003: 77–78; Museums and Galleries Commission, 1991: 17; Robertson, 1985: 126; The Arts Council of Great Britain, 1977: x). There was also concern that placement within a department may

skew the function of the LAM towards the focus of the department, so those that became part of a leisure department may prioritise the leisure components of their service to the detriment of other areas (Boylan, 1986: 3). For example, Robertson describes the situation of the Commandery in Worcester where the curator describes the museum as having lost its status due to some of the space being taken over by displays 'on the intellectual plane of a seaside fairground' and by local manufacturers producing reproductions (Robertson, 1985: 126).

Two reports reviewed the provincial museum sector in the 1970s. The Wright report, from the Department of Education and Science, had many similarities to the early surveys from Miers and Markham: provincial museums lacked appropriate staffing, often being managed by a librarian, there was geographic inequality and a lack of funding (Department of Education and Science, 1973). Wright recommended that regional centres of excellence and a central advisory body were established, a strategy supported by the MA (Babbidge, 2005: 23; Department of Education and Science, 1973: 48–49). In response, increased funds for the AMCs were promised but the report came too late to have an impact on the LA reorganisation (Babbidge, 2005: 24). The Drew Report, from the Standing Commission on Museums and Galleries, argued that AMCs should support most museums outside of London, but that the central government should directly support a few large regional museums based on their ability to serve an area greater than that served by their LA (Standing Commission on Museums and Galleries, 1979). However, in 1984, the Museums and Galleries Commission (MGC) reported that AMCs had 'somewhat neglected' their co-ordination and planning role, conceding that it was outside the scope of their original remit (Museums and Galleries Commission, 1984: 5).

## **2.3 Conservative Government 1979 to 1997**

The Conservative Thatcher government elected in 1979 introduced a new ideological foundation for LAs. In opposition to the premise that gave rise to the Welfare State, the Conservatives argued that the private sector was superior to the public sector due to the latter being controlled by those with a vested interest in growing their domain. Thatcher saw LAs as inherently inefficient and wasteful due to lack of competition (Chandler, 2009: 135; Leach, 2015: 72; Wilson and Game, 2002: 60).

Resultant policies over the nearly two decades of Conservative rule reduced LA discretion by tightening spending controls through the introduction of penalties for overspending, and by capping rates to limit what LAs could raise themselves (Byrne, 1996: 2–3; Chandler, 2009: 189; Leach and Percy-Smith, 2001: 65; Richards, 1983:

127; Stoker, 2004: 31; Wilson and Game, 2002: 17–19). The latter can be seen in income figures: in 1981-82, approximately 44% of LA income came from central government grants and by 1995-96, 83% did, with overall income having decreased (Byrne, 1996: 104)

A mixed economy of organisations delivering public services was promoted in order to encourage competition and therefore efficiency. It was theorised that efficient and effective local government was an enabler of services rather than a provider, with the argument that setting standards and monitoring performance were best undertaken when separated from the day to day service provision (Department of the Environment, 1991: 4). Finally, there was emphasis on LA services having clear statements of purpose and service standards designed through market testing so that services suited users rather than the LA (Conservative Party, 1991: 1; Department of National Heritage, 1996: 2; Department of the Environment, 1991: 4).

This was achieved through the introduction of Compulsory Competitive Tendering (CCT), whereby LAs were required to put certain services out to tender and award the contract to the bidder that fulfilled the requirements of the service in the cheapest way (Chandler, 2009: 135–138; Dorey, 2014: 196; McLaughlin and Osborne, 2002: 8–10). Further, the emphasis on economy of public expenditure and preference for the private sector manifested as New Public Management, with LAMs advised to supplement their income using private sector practices (Kawashima, 1999: 158; McLaughlin and Osborne, 2002: 8–10).

### ***2.3.1 Local Authority Museums under the Conservative Government***

The Thatcher administration is considered a decisive juncture in the history of LAMs by some academic and sectoral commentators as the Conservative emphasis on market forces meant that their right to public funding was questioned seriously (Davies and Selwood, 1998: 69; Selwood, 2002: 19; Stevenson et al., 2010: 160–161). LAs were criticised for providing leisure services, including museums, that did not have clear objectives and did not have performance measures in place. As a result LAMs had to work harder to justify their right to funding (Davies and Selwood, 1998: 69; Kawashima, 1999: 162). It was felt that arguments related to educational value were having less impact due to this focus on value for money, and when Myerscough introduced the concept of the economic importance of the Arts, studies of economic impact became common in justifying museum provision (Belfiore, 2012: 105; Gibson, 2008: 248–249; Kent County Museums Service, 1984: 14–15; Myerscough, 1988; Selwood, 2010:



7574). Holden describes the Conservatives as making culture '[...] the handmaiden of the economy' (Holden, 2004: 15).

LAMs were advised that they should supplement their income using private sector practices (Kawashima, 1999: 158; McLaughlin and Osborne, 2002: 8–10). For example, the Audit Commission told LAs to carefully review their museums services to identify why they were being supported and whether they represented value for money. They advocated a 'marketing approach', along with performance measurement, business planning and earned income (Audit Commission for Local Authorities and the National Health Service in England and Wales, 1991: 5–7). This was pragmatically welcomed in one review of the sector as a 'healthy move' away from naivety, due to the critical need for commercial acumen in the prevailing economic and political climate (Cultural Trends, 1992: 60).

### ***2.3.2 Change in Central Bodies***

The Standing Commission on Museums and Galleries was restructured and rebranded as the MGC in 1981. The MGC's role remained to provide advice and guidance to museums (Babbidge, 2005: 23). The first Minister for Arts was Labour MP Jennie Lee in 1964, but in 1992, the Department of National Heritage was established and this was the first time that the Arts were represented at cabinet level (Eckstein, 1992: 4; Selwood, 2002: 20). This suggests increased recognition of arts and culture in the central government.

The market driven politics of the era can be seen reflected in both bodies, as they pushed to standardise, professionalise and commercialise the sector. The MGC recommended that museums develop corporate plans, develop their facilities to be more competitive with other leisure options and market their services to non-users (Museums and Galleries Commission, 1992: 33–35, 50; Museums and Galleries Commission, 1990: 114). They introduced a museum registration scheme in 1988 to encourage improved standards in areas such as collections care, an aim it was considered to have accomplished (Department of National Heritage, 1996: 8). The scheme was voluntary, but was a requirement of eligibility for many grants meaning that it was a desirable achievement for museums (Kawashima, 1997: 26). At the end of the Conservative administration, the Department of National Heritage set out multiple instrumental functions and objectives for museums, asking them to widen their audiences, develop their educational role, diversify their funding sources through corporate ventures and sponsorship, aid economic regeneration and undertake research (Department of National Heritage, 1996: 3, 10, 20–22).

A significant change in the situation for capital funding came with the advent of the National Lottery and the HLF in the mid-1990s (Selwood and Davies, 2005: 429; Shaw, 1989: 3). Much needed investment was made in museum buildings and displays, which had been described as ‘tired and tatty’ in comparison to museums in North America and other European countries (Renaissance Review Advisory Group, 2009: 9; Selwood and Davies, 2005: 429). The HLF was criticised by academic and sectoral commentators for largely funding ‘bricks and mortar’ projects and spawning new and bigger buildings with higher operating costs, but was also seen as enforcing high standards and encouraging new skills, such as business planning in the sector (Babbidge, 2000: 27; Davies, 2005: 72; Selwood, 2001b: 154).

The original National Lottery white paper anticipated concern that lottery funds would enable the withdrawal of public funding and stipulated that the proceeds of the National Lottery should not enable reduction in conventional government expenditure, that funds must be additional (Home Office, 1992: 8). However, this principle was not clearly defined in the National Lottery etc. Act 1993 (*National Lottery etc. Act*, 1993). As a result, whether the principle was upheld was disputed (Selwood, 2001b: 161). The updated National Lottery Act 2006 does state that the bodies distributing the funds should describe in their annual reports their policies and practice in relation to the ‘additionality principle’, but still does not legislate any responsibility for the government in this area (*National Lottery Act*, 2006).

### **2.3.3 Further Local Authority Reorganisation**

Six metropolitan local authorities and the Greater London Council were abolished in 1985 and the overall structure of LAs was reviewed again in the early 1990s by the Local Government Commission (Byrne, 1996: 29, 81). Their recommendation was similar to that of the Redcliffe Maud Commission’s 1969 report, as they again called for single tier local government in the form of unitary authorities (see 2.2.3). They claimed that the two-tier system was confusing, overly bureaucratic and led to duplication of effort (Chandler, 2009: 21; Department of the Environment, 1991: 5–6; Stoker, 2004: 29). Unlike the Redcliffe Maud report, on this occasion the recommendation was acted upon, with one in seven local authorities abolished between 1994 and 1998 and replaced with Unitary Authorities (Chandler, 2009: 190; Wilson and Game, 2002: 14). For LAMs, this brought uncertainty over their future governance at a time when budgets were declining, and uncertainty continued for a number of years as final deals were negotiated (Boylan, 1992: 17–18; Conybeare, 1995: 9). Some museums services were divided by the new authority’s boundaries leaving individual museums outside of

the area controlled by the LA they belonged to (Conybeare, 1994: 7). For example, the Yorkshire Museum fell within the boundaries of the new York Unitary Authority but had previously been part of a county-wide museums service. They campaigned to become part of North Yorkshire County Council in order to retain this reach, but ultimately moved to the unitary authority (Murdin, 1995c: 7, 1995b: 11). Leicester Museums Service faced being divided between unitary and county authorities, as the new unitary council wanted to take control of museums that had previously belonged to the old city council (see 2.2.3) (Murdin, 1995a: 13). The museums service argued that a joint board to enable continued co-ordination between all museums was a reasonable compromise (Murdin, 1995a: 13, 1996: 7; White, 2014: 127–137).

## **2.4 New Labour 1997 to 2010**

A major criticism of the Conservative direction was that the focus on economy came at the expense of effectiveness. Coming to power in 1997, New Labour criticised CCT for neglecting service quality (Department of the Environment Transport and the Regions, 1998: 16; McLaughlin and Osborne, 2002: 9; Wilson and Game, 2002: 17). The Local Government Act 1999 replaced CCT with 'Best Value' whereby LAs were required to continually try and improve quality, efficiency and effectiveness (Lawley, 2003: 78; Martin, 2002: 131). This was supposed to improve the balance between quality and economy.

Despite this criticism, New Labour's initial evaluation of local government, published in the 1998 White Paper 'Modern Local Government: In Touch with the People', continued several of the themes from the previous administration. Firstly, they maintained the view that local government tends to grow and spend more as this suits them as a service provider. As a result they continued to promote a mixed economy for public service provision, and by 2006 were looking at reining in expenditure (Chandler, 2009; Department for Communities and Local Government, 2006: 12; Department of the Environment, Transport and the Regions, 1998: 12; Martin, 2002: 131–132; Middleton, 1998: 9). Secondly, they maintained the view that local government was too confusing for local people leading to poor participation and accountability. To address this, they focused on reforming internal decision-making transparency (Brooks, 1999: 43). They argued that public participation should be used in designing service provision so that the public being served is put first (Department of the Environment Transport and the Regions, 1998: 12).

Overall, New Labour added a layer of bureaucracy and created an administrative burden for LAs. Best Value was applied to all LA functions, an expansion on the limited

reach of CCT, and has been described as 'the cult of the measurable' due to its emphasis on performance indicators and audit (Belfiore, 2012: 107; Martin, 2002: 131; Wilson and Game, 2002: 17). While the Conservative administration had constrained local government indirectly through spending controls, New Labour were more interventionist with their comprehensive system of target setting (Chandler, 2009: 137–140; Stevenson et al., 2010: 161). Later in the New Labour period, discontent about the heavy-handedness of the target setting saw rhetoric around the concept of localism emerge. In the 2006 Department for Communities and Local Government white paper 'Strong and Prosperous Communities' they pledged to simplify performance measurement by reducing the number of indicators required and customising them according to locally agreed plans (Department for Communities and Local Government, 2006: 11).

#### ***2.4.1 Local Authority Museums under New Labour***

In promoting a mixed economy for public service provision, New Labour recommended the consideration of Trusts as the best form of governance for LAMs, over the traditional LA committees (Chandler, 2009; Department of the Environment Transport and the Regions, 1998: 12; Martin, 2002: 131–132; Middleton, 1998: 9). Best Value was applied to all services and there was a performance indicator for culture in the framework (Selwood, 2002: 45). The newly established DCMS, encouraged museums to take on board the messages of Best Value by improving their services, benchmarking, conducting market research and improving management skills (Middleton, 1998: 2). As such, there was no apparent reversal of the efficiency, commercialisation and market awareness demanded by the Conservative government, and performance measurement became an added burden.

A change brought about by the New Labour government was the focus on strategic outcomes rather than the delivery of specific services, through which museums were commissioned as a tool for achieving social regeneration and inclusion (Davies and Selwood, 1998: 69, 93; Department for Culture, Media and Sport, 1998: 3; Jancovich, 2011: 271; Stevenson et al., 2010: 160–161; Tlili et al., 2007: 273, 281). In 'A New Cultural Framework', published in 1998, extra funding was pledged to the cultural sector with a focus on arts and museums and an emphasis on provincial culture. In exchange museums were expected to demonstrate their value by contributing to these wider government objectives (Davies and Selwood, 1998: 78; Department for Culture, Media and Sport, 1998: 1, 4, 5, 17–18; Selwood, 2002: 42–44).

There was opposition to this instrumental use of museums (Heal, 2013: 163). Concern was raised by sectoral commentators about the impact of the policy on other aspects of museums: that public participation may hinder professional standards, such as collections care; that centralised performance measures threatened local agendas; and that performance indicators prioritised quantity over quality of engagement (Goodison, 2004: 7; Harris, 2007: 18; Museums Association, 2012: 20). In the mid-2000s, then Secretary of State for Culture, Media and Sport Tessa Jowell asserted her belief in the intrinsic benefits of the Arts (Jowell, 2004, 2005). She welcomed the association of the Arts with social outcomes but espoused that this was because it showed that they were not an optional part of life:

[...] the Arts are an integral part of the public realm, integral to our personal and national life. (Jowell, 2005: 4).

Jowell acknowledged the need to justify government expenditure on the Arts to tax payers, but appeared uncomfortable with doing so, asking stakeholders to think about how the value of culture can be conveyed without targets and measurements (Jowell, 2004: 4–5, 2005: 5).

The debate culminated in the McMaster report, published in 2008. Arguing that the value of culture was too profound to be constrained by quantitative targets and therefore opposing top-down target setting, McMaster also seemed to disregard the voice of the public by calling for self-assessment and peer review of cultural organisations and funding bodies (McMaster, 2008). McMaster called for focus on 'excellence' in the Arts that would come from experts making the decisions, arguing that accessibility could be fostered through increasing free admission rather than through public engagement (McMaster, 2008: 17).

### **2.4.2 Re:Source and Renaissance**

New Labour's 'A New Cultural Framework' saw the merger of the MGC with the Libraries and Information Commission in 2000 to form Re:Source, the Council for Museums, Archives and Libraries, later rebranded as the Museums, Libraries and Archives Council (MLA) (Babbidge, 2005: 21). The government argued that the museums sector as a whole lacked strategic leadership as DCMS focused on the national museums and MGC on the rest (Museums Association, 1998: 3). The new organisation was intended to enable strategic co-ordination due to the commonalities between the three sectors it represented, to provide advice to the government, and to provide leadership to the sectors (Davies, 2005: 73; Museums Association, 1999: 1). However, the MLA was intended to have fewer executive responsibilities than the

MGC, and was encouraged to contract out operations in order to focus on standard setting and strategy (Museums Association, 1999: 1).

The flagship programme of the MLA for museums was Renaissance in the Regions. Initiated in 2000, a task force found that the museums sector was fragmented and recommended regional museum 'hubs' based at major regional museums. They argued that by concentrating funding in these hubs they could exemplify 'best practice' and support its spread through the region (Museums Association, 2001: 1–2; Re:source, 2001: 10–11). It was at this point that AMCs were abolished: even though they were considered to do good work, it was felt that the regional structures could be strengthened (Museums Association, 1998: 3).

The Renaissance programme represented an unprecedented level of central funding to regional museums, and the funds were in the form of annual grant-in-aid, rather than one-off capital payments (Babbidge, 2005: 44–45; Davies, 2005: 75). The caveat was the imposition of targets: to increase the number of visits by children, people from lower socioeconomic groups (C2DE), and BAME people. Data collection was embedded in the hub museums through quarterly quantitative reporting in which the same measures were reported as the national museums (Everitt, 2009: 92). The MLA reported that this emphasis on data collection was to enable the sector to evidence its contribution to the government's social agenda (MLA, 2007: 3).

The programme was appraised in 2008 and the review published in 2009. While then Secretary of State for Culture, Media and Sport Andy Burnham said that it had provided stability for the sector (Burnham, 2009: 250), the review found that the programme had been inconsistently funded and poorly supported, even from within the Council for Museums, Archives and Libraries (Renaissance Review Advisory Group, 2009: 11). The appraisal found that museums in the regions had a higher profile and were better at raising income, but that the programme had lacked leadership and coordination (Hewison, 2011: 238; Renaissance Review Advisory Group, 2009: 9–11). Despite the focus on data collection, the advisory group reported that their review had been hampered by poor evidence (Renaissance Review Advisory Group, 2009: 8).

## **2.5 Summary: Key Themes**

The developments discussed in this chapter provide an overview of change in political thinking and its impact on LAMs over time. However, in selecting relevant events and policy variations for inclusion and covering them concisely, it is difficult to avoid generalising. For example, New Labour are characterised as increasing expenditure on

arts and culture, but by the mid-2000s they were making cuts to public spending and reports were emerging about the impact on LA cultural provision (Holden, 2006: 6). Further, requiring social outcomes from museums is associated with New Labour, and while New Labour escalated this policy, the Department of National Heritage also encouraged cultural organisations to contribute to social issues (Selwood, 2002: 29).

The divisions between stages of political thinking are less distinct than can be presented in an overview. Nonetheless, the discussion in this chapter covers the significant developments as identified through a substantial literature review and therefore provides a valuable, broad picture of the political pressures on LAMs over time. It highlights a number of themes showing both aspects of consistency and change for LAMs, and these are summarised below. These themes will be key in later chapters.

### *Increasing Expectations*

While there has never been a specific national policy for museums, they have been affected by wider policy initiatives and responsibilities, expectations and controls have been added over time. First valued for their perceived 'civilising effect' on the general public, museums have been recruited to play their part in the war effort, to contribute to formal education, to develop civic pride, to contribute to local economic development, to contribute to regeneration, and to encourage social inclusion (Department for Culture, Media and Sport, 1998; Haward, 1922: 35; Kawashima, 1997: 17; Myerscough, 1988; Standing Commission on Museums and Galleries, 1963). In addition, LAMs have increasingly been expected to justify their existence and to increase earned income from a range of sources, requiring fundraising, marketing and commercial activities (Davies and Selwood, 1998: 69; Kawashima, 1999: 158; McLaughlin and Osborne, 2002: 8–10). This further complicates the management of a museum:

The cultural aims and practices of organisations have been subverted. Energies have been directed at funding and collecting evidence rather than achieving cultural purposes. (Holden, 2004: 20).

All these requirements add to the complexity of museum management. Re:source argued that regional museums try to fulfil too many roles and therefore do none of them well (Re:source, 2001: 10).

### *Weak Supporting Bodies*

Central government intervention in regional museums was requested by multiple reviews of the sector, though the rationale for support and nature of support requested has varied. Rosse in 1963 and Drew in 1979 argued that there were regional collections of national importance that should be financially supported centrally (House of Commons Education, Science and Arts Committee, 1980: 419; Standing Commission on Museums and Galleries, 1963: 47). In 1990, the MGC argued that central government should at least prescribe a broad definition of an adequate local authority museums service, citing the existence of weak museums that were not worthy of public funds (Museums and Galleries Commission, 1990: 8).

In practice, central government support for LAMs has followed an 'arms-length' principle, either consisting of advisory bodies or small-scale and indirect financial support that can encourage the museums sector but not interfere (Kawashima, 1997: 26). These supporting bodies have suffered from lack of authority, lack of longevity, or lack of financial resources. The Royal Commission on National Museums and Galleries had little power. The Standing Commission on Museums and Galleries had longevity but little funding. The MGC, Re:Source and the MLA reflected wider government priorities - market-driven politics for the MGC and social inclusion rhetoric for the MLA.

Not unique to museums, political analysts argue that since the 1970s the frequency of restructurings and changes in fashion regarding management approaches in government has led to the loss of institutional memory and therefore the ability to learn from experience (Hood and Dixon, 2015: 4). Quangos are often abolished, reformed, merged and relabelled following the election of the new government due to election campaign promises, and this has created particular 'administrative confusion and uncertainty' in the UK (van Thiel, 2012: 399–400).

### *Inequality of Provision*

There is unequal provision of LAMs across the country in terms of geographic distribution, levels of funding and quality. This is due to 'historical accident' and the discretionary nature of museums as an LA service (Boylan, 2006: 2011; Kawashima, 1997: 18). Any type of LA can run a museum but none are obliged to do so and there is no guidance about how much an LA should spend on museums and what the offer should look like.

A common argument throughout the reviews of regional museum provision is that they should collaborate and co-operate more, both with each other and with national



museums, with the rationale that this would improve standards across the board (Audit Commission for Local Authorities and the National Health Service in England and Wales, 1991: 7; Babbidge, 2005: 16, 25; DCMS, 2016: 34; Department of Education and Science, 1973: 10; Department of National Heritage, 1996: 19–20; Great Britain, 1970: 5; Goodison, 2004: 2; Hill, 1932: 303; Miers, 1928: 27, 55; Museums and Galleries Commission, 1991: 18, 113; Paine, 1986: 5; Re:source, 2001: 10–11). We can question why this perceived failing of the sector has persisted.

### *Financial Concerns*

Finances have been a constant concern for LAMs. Often established with enthusiasm, revenue funds were not always adequately considered. Further, while museums are seen as having long-term value, they are politically difficult to prioritise in the short term due to their status as a discretionary service (Davies, 1994b: 82; Lawley, 2003: 76). Until the establishment of the HLF in the mid-1990s, capital funds for developments were hard to come by. HLF has brought investment to LAMs on an unprecedented scale (Selwood and Davies, 2005: 429; Shaw, 1989: 3). However, HLF investment has been criticised for creating bigger museums with higher operating costs which are hard to maintain (Babbidge, 2000: 27; Selwood, 2001b: 154).

Since the election of the Conservative Thatcher government in 1979, LAMs have been encouraged to find alternative sources of income using private sector practices, and New Labour continued this trend. The initial success of LAMs in finding alternative sources of funding can be questioned: in 1998 approximately 86% of LAM funding still came from public sources, suggesting that despite the financial pressure on LAMs they were still largely dependent on their LAs (Darnell et al., 1998: 78). I will analyse recent progress in this area in later chapters.

### *Conclusions*

By chronologically tracing policy and legislation that has had an impact on LAMs up until the onset of fiscal austerity in 2010, I have compiled an understanding of the status of LAMs as they began to deal with austerity. In the next chapter, the economic crisis and the political response to it will be introduced. Current work on the impact of austerity on LAs and on LAMs will then be discussed in order to construct the foundations on which this study will build.

## 3 The Economic Crisis and Austerity in England

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In this chapter I describe the economic situation in England to provide context for my research. I briefly summarise the events that lead to the economic crisis, and explain the theory behind the policy of fiscal austerity and the arguments of those that oppose it. It is not the purpose of this study to debate whether fiscal austerity is the right policy, but it is essential to introduce the concepts in order to understand the political and economic climate that LAMs operate in. I then explore how this policy has affected local authorities before introducing the existing research on how LAMs have been affected.

### 3.1 The Economic Crisis

The economic crisis under examination became apparent in 2007. The first casualty was the US investment bank Bear Stearns, which announced major losses in July of that year, swiftly followed by Northern Rock in the UK in September. Panic rose across the sector and the crisis spread to hit most of the major economic powers of the world (Gamble, 2014: 53; Hindmoor and McConnell, 2015: 69–70; Kingsley, 2012: 3; Lybeck, 2011: 29–94; United Nations and United Nations Conference on Trade and Development, 2008: iii).

Both academic and regulatory commentators attribute the crisis to excessive risk-taking in the financial sector enabled by poor regulation (Farlow, 2013; Gamble, 2014; Hindmoor and McConnell, 2015; Lybeck, 2011; United Nations and United Nations Conference on Trade and Development, 2008: iii). In retrospect, there was clear evidence that the financial sector had been engaging in high-risk activities for many years before the crisis but little evidence that policy makers, regulators and academic commentators were aware of, or at least concerned about it (Hindmoor and McConnell, 2015: 65). Explained as simply as possible, banks had been borrowing money from other banks and lending it again on higher but still attractive rates using a high risk strategy. The operation of this system depended on confidence as it meant that the banks were maintaining liabilities far greater than their assets:

The ability of the banks to trade and increase credit was a confidence trick in the true sense. It worked wondrously well so long as everyone suspended their disbelief and acted as though the banks really could create new wealth and were therefore content to leave their deposits

with the bank and not demand their money back all at the same time.  
(Gamble, 2014: 57).

By mid-2007, banks were no longer willing to lend to each other as they were not confident that they would get their money back. They also called in existing loans. From a situation where credit was free-flowing, it was suddenly severely limited and this caused a cash-flow problem (Gamble, 2014: 53; Hindmoor and McConnell, 2015: 69). To continue operating, more and more banks requested bail-outs from the government. In the UK, Northern Rock was nationalised in March 2008, and Lloyds TSB, Bradford and Bingley, HBOS and RBS were all effectively nationalised through a £37bn recapitalisation scheme (Gamble, 2014: 54–55; Hindmoor and McConnell, 2015: 69–70; Lybeck, 2011: 29–94).

Though a stringent approach was considered, as evidenced by the US government's refusal to bailout Lehman Brothers, governments around the world did not feel that they could leave this failure of confidence to play out because the political economy had become structurally dependant on the banks - banks had become 'too big to fail' (Gamble, 2014: 58–59; Lybeck, 2011: 16; Mullard, 2011: 50). Rescue packages included reducing interest rates to nearly zero to ease the burden of debt, nationalising and bailing out failing banks, and increasing the supply of money to prevent deflation (quantitative easing) (Gamble, 2014: 2; Kickert, 2012: 301). These measures were designed to prevent collapse of the financial system but were not a long-term solution (Gamble, 2014: 2).

Following the financial crisis came recession, which was the most severe since the Second World War. In the UK, the economy contracted by 6.1% between the first quarter of 2008 and the second quarter of 2009, compared to 5.9% on average across the European Union, higher than was predicted by the International Monetary Fund (IMF) (Gamble, 2014: 2, 60; OECD, 2018). Further effects included higher unemployment, lower private consumption and falling living standards (Clark and Heath, 2014: 71–80; Gamble, 2014: 61; Hülsman, 2011: 23–26; Joyce and Sibieta, 2012: 2–9, 24).

Finally, the bailouts dramatically increased sovereign debt with the IMF, estimating in 2011 that the global cost was \$16 trillion. Concerned by uncertainty over how much debt a government can feasibly take on, focus moved from stabilising the financial sector to dealing with sovereign debt (Gamble, 2014: 61; Kickert, 2012: 300; Langley, 2015: 147; Mullard, 2011: 45; Rhodes, 2010: 24).

## 3.2 Fiscal Austerity in the UK

For the UK government, the recession led to the largest peacetime budget deficit in history (HM Treasury, 2010: 5). Tax revenues decreased while welfare payments increased, which in combination with the cost of bank bailouts and the deficit spending by the Labour government, made public spending and sovereign debt appear a problem (Bailey et al., 2015: 572; Langley, 2015: 146). Campaigning for the 2010 general election, the Conservative party blamed the crisis partly on lax regulation of the financial sector but also on excessive spending by Labour (Gamble, 2014: 73). Coming to power as part of the coalition government in 2010, they promptly undertook a spending review which was published in October of that year. The spending review confirmed plans for fiscal austerity; reducing government spending to reduce the budget deficit as a strategy for sustained economic growth (HM Treasury, 2010: 5).

There are three main theoretical constructs behind the Conservative policy. First, they follow the economic theory that market expenditure is better than government expenditure; that government spending stifles the private market by using resources that could be used more productively in the private sector and that government spending should be kept to a minimum to allow private growth (Gamble, 2014: 62, 165–168; Langley, 2015: 153; Mullard, 2011: 5; Raberto et al., 2014: 163). Second, they believe that the private sector is best left to self-regulation, meaning that limited government oversight is recommended to provide freedom for entrepreneurs (Mullard, 2011: 8, 58–59). Finally, they think that businesses are less likely to invest in a country with high sovereign debt because it appears that the country is irresponsible. High sovereign debt is also hypothesised to increase borrowing costs and interest due to the country not appearing 'credit worthy' (Bailey et al., 2015: 572; Langley, 2015: 154).

Alternatives to the Conservative strategy have been proposed. For example, austerity measures can include increased taxes but as this decreases disposable household income, causing a decrease in consumer spending, it could stall economic growth (IMF, 2010: 93; Rhodes, 2010: 23, 39–40). Another argument is that governments need to take a lead role during crisis, as cutting spending at the same time as private activity is reduced makes an overall slump more likely (Gamble, 2014: 168). Farlow argues that private debt is more of an issue in the UK than sovereign debt as it means that the private sector is unable to fill the gaps left by the policy of fiscal austerity, noting that recovery has been the slowest since the 1930s, with further cuts still to come (Farlow, 2013: 248–249). Fiscal stimulus, then, may have encouraged private expansion by increasing confidence in private debt and providing infrastructure for

business (Anderson and Minneman, 2014: 119; Mullard, 2011: 44; Raberto et al., 2014: 164). The idea of market self-regulation can thus be challenged, with the private market instead associated with individual self-interest and neglect of societal responsibility. The contemporary crisis is evidence of this, with risk-taking a commonly argued cause as described above (Mullard, 2011: 60; Rhodes, 2010: 37).

Evidence of the impact of sovereign debt and of fiscal austerity from previous periods is mixed. An IMF report used in the emergency budget of June 2010 argued that for every 10% increase in sovereign debt as a proportion of Gross Domestic Product (GDP) there would be a reduction of 0.25% long term economic growth, and an influential study from Harvard University concluded that sovereign debt of 90% of GDP or over has a negative effect on economic growth (Langley, 2015: 154; Reinhart and Rogoff, 2010: 2). The latter study has since been discredited, with a replication of the study finding that data had been selectively excluded, that there had been coding errors, and that statistical methods had been used inappropriately (Canterbury, 2015: 1–3; Herndon et al., 2014: 257). Nonetheless, these studies have been used by politicians in favour of fiscal austerity as suggesting that all sovereign debt is problematic (Canterbury, 2015: 1–3). A study of policies aiming to reduce deficits over the past 30 years found a small negative impact on GDP and employment in the initial two years but potential for positive effects in the longer term (IMF, 2010: 93). Conflictingly, another study found that spending cuts may increase growth in the short term, whereas tax increases may stifle growth (Anderson and Minneman, 2014: 114–115). In practice, political commentators have noted that economic growth has been sluggish in Europe and attribute this to the severity of the fiscal austerity applied in combination with the conservative approach taken by the private sector (Oxford Economics, 2013: 15–17).

The issue with predicting the impact of a fiscal austerity policy from past events lies in differing factors such as tax and spending levels beforehand, scale and type of austerity measures put in place and strength of economy beforehand (Anderson and Minneman, 2014: 116–117). For example, Oxford Economics estimate that if fiscal austerity had been half as severe in the Eurozone periphery, there would be 1.2m fewer unemployed with only a 1-2% increase in the deficit due to the improvement in economic activity (Oxford Economics, 2013: 15). This study, by a university-associated but commercial research organisation, appears to advocate austerity, but notes the importance of considering the appropriate level. Further, the impact varies by the outcomes measured, timeframe considered and targeted community. For example, younger people may suffer more from the present crisis through taking on proportionally more financial burden, such as through student debt or through

measures to shore up the current pension system, and this may have a longer term impact on economic growth as this generation will have reduced ability to invest in economic productivity (Anderson and Minneman, 2014: 118–119).

What this suggests is that direct comparison with other periods of fiscal austerity is not appropriate as there is not enough evidence to predict the impact of fiscal austerity in a particular situation based on another. Due to this lack of consensus in economic studies, one can see that the Conservative policy is one of political ideology rather than absolute necessity as claimed (Bailey et al., 2015: 572; Mullard, 2011: 173). The Conservative strategy has been largely about maintaining the financial system, apparently seeking to restore:

[...] the uncertain circulations of the markets and banking, thereby securing the apparently productive force of those circulations for wealth and well-being in a valued form of liberal life. (Langley, 2015: 153).

While crisis can encourage new ideas, academic commentators have noted that those in power have sought to patch existing systems rather than strive for radical change. For example, financial regulations have been tightened somewhat, but the overall political and economic structure has remained in place (Gamble, 2014: 11–12). Lack of change to the system leaves concern that the crisis has been postponed rather than solved. Banks may have seen the bailout packages as evidence that they would always be rescued, meaning that they did not take action to lower their risk. While the financial market was stabilised, the inherent risk in the system was accepted and re-enforced meaning that one would expect the issue to re-emerge (Hindmoor and McConnell, 2015: 65; Lybeck, 2011: 16; Mullard, 2011: 46):

The 2008 crisis was merely the latest and most severe expression of the systemic tensions and contradictions in a loosely regulated global system of financialised capitalism. (Kennett et al., 2015: 623).

### **3.3 Fiscal Austerity for Local Authorities**

#### ***3.3.1 Local Authorities on the Eve of Fiscal Austerity***

When the Conservative government was formed in 2010 there were 353 Local Authorities in England with some areas having one tier of local government (London Boroughs, Unitary Authorities or Metropolitan Borough Councils) and others two (County Councils as the first tier and District Councils the second). There are regional differences in LA organisation, with the North East comprising solely Metropolitan

Districts and Unitary Authorities, London having its own structure, and other areas more mixed (Table 1).

The functions of LAs include social care, transport, planning, housing, waste collection, and leisure (National Audit Office, 2016). Shire Counties and Districts share these responsibilities, and can agree to perform those belonging to each other (Sandford, 2018).

**Table 1: Local Authorities in England in 2010 by class and region**

	<b>London Borough</b>	<b>Metropolitan District</b>	<b>Unitary Authority</b>	<b>Shire County</b>	<b>Shire District</b>
<b>East</b>			6	5	41
<b>East Midlands</b>			4	5	36
<b>London</b>	33				
<b>North East</b>		5	7		
<b>North West</b>		15	6	2	18
<b>South East</b>			12	7	55
<b>South West</b>			12	4	25
<b>West Midlands</b>		7	4	3	19
<b>Yorkshire and Humber</b>		9	5	1	7
<b>Total</b>	33	36	56	27	201

*ONS; Not included in this study are Fire and Rescue Authorities, Police Authorities, National Parks, and Town and Parish Councils*

### **3.3.2 Change in Local Authority Funding**

As shown in Table 2, LA funding comes from a variety of sources. In the year prior to the formation of the Conservative government (the 2009-2010 financial year), 63% of funding came in the form of grants from the central government, 30% was raised locally, with the remainder from other sources (Local Government Financial Statistics).

As a result of the initial comprehensive spending review in 2010 LAs faced an estimated 37% real-terms cut in central government grants, and this policy continued after the 2015 election with a further 56% reduction in central government grant funding

announced (Lowndes and Gardner, 2016: 358; National Audit Office, 2014b: 4, 2016: 5).

For locally-raised income, LAs were initially subject to a freeze in council tax income, with the government announcing in 2010 that LAs that increased their council tax rate in 2011-2012 would receive less grant funding in return so that they would not have additional net income (Crawford and Phillips, 2012: 125). The National Audit office estimated that the drop in spending power<sup>2</sup> experienced by LAs by March 2013 varied between 1.1% and 8.8%, but other studies found more dramatic figures (Department for Communities and Local Government, 2014b; Fitzgerald et al., 2013: 2; Hastings et al., 2013: 3, 7; National Audit Office, 2013: 6).

However, since 2016-2017 LAs have been able to add additional charges to council tax (National Audit Office, 2016: 5). For example, LAs with responsibility for adult social care will be able to add 2% to council tax (National Audit Office, 2016: 6). The government is also piloting business rates retention. Until 2013, business rates were collected centrally and distributed to LAs alongside other grants (Department for Communities and Local Government, 2013c). Since then, 50% of business rates have been retained locally and the remainder redistributed, and LAs will eventually be able to retain 100% of the business rates they raise (Department for Communities and Local Government, 2017c: 6). A number of LAs began piloting this full retention scheme in 2016-2017, and as part of it they will have more control over the rates they charge, for example being allowed to reduce them to encourage private sector growth (National Audit Office, 2016: 5). Despite these allowances, the National Audit Office (NAO) estimates that the deal represents a 7.8% cut in spending power between 2016-2017 and 2019-2020 (National Audit Office, 2016: 6). In 2016-2017, the result of these changes was that 52% of LA funding came from grants and 37% was raised locally (Local Government Financial Statistics).

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<sup>2</sup> Spending Power is the combination of central government funding and the money that the councils raise themselves through council tax (Hastings *et al.* 2013, p. 2)



**Table 2: Summary of Local Authority Income from 2007 to 2017 (£ million)**

	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
<b>Grant income</b>										
Revenue Support Grant	3,105	2,854	4,501	3,122	5,873	448	15,175	12,675	9,520	7,188
Redistributed Non-Domestic Rates	18,506	20,506	19,515	21,517	19,017	23,129				
Police Grant	4,028	4,136	4,253	4,374	4,546	4,224	7,565	7,784	7,423	7,387
Specific and Special Grants Inside Aggregate External Finance	44,485	42,926	45,639	45,750	45,502	41,820	41,760	40,805	40,119	39,218
Local Services Support Grant					253	223	77	48	29	19
General GLA Grant			48	48	63	50				
Area Based Grant		3,051	3,314	4,363						
Other Grants Inside Aggregate External Finance	38	48								

Grants Outside Aggregate External Finance	14,112	14,991	17,064	19,069	18,614	18,850	18,417	18,655	18,296	21,608
Housing subsidy	11	-235	-134	-494	-704	-791	-795	-692	-734	-767
Grants Towards Capital Expenditure	9,027	7,711	8,760	9,592	8,637	9,739	8,782	9,996	10,863	9,610
<b>Total Grant Income</b>	<b>93,312</b>	<b>95,988</b>	<b>102,961</b>	<b>107,341</b>	<b>101,800</b>	<b>97,692</b>	<b>90,982</b>	<b>89,271</b>	<b>85,516</b>	<b>84,263</b>
<b>Locally-Funded Income</b>										
Council Tax	23,608	24,759	25,633	26,254	26,451	26,715	23,371	23,964	24,734	26,083
Retained Income from Rate Retention Scheme							10,719	11,331	11,855	11,735
External Interest Receipts	1,862	1,926	778	663	860	815	839	865	1,047	1,088
Capital Receipts	3,992	1,353	1,427	1,498	2,014	2,124	2,481	2,996	2,196	2,327
Sales, Fees and Charges	11,884	12,549	12,852	12,597	11,992	12,201	12,695	11,741	11,666	12,103
Council Rents	6,265	6,219	6,326	6,317	6,583	6,916	7,215	7,439	7,468	7,110
<b>Total locally-funded income</b>	<b>47,612</b>	<b>46,806</b>	<b>47,017</b>	<b>47,328</b>	<b>47,900</b>	<b>48,771</b>	<b>57,319</b>	<b>58,335</b>	<b>58,966</b>	<b>60,445</b>

Other income and adjustments (g)	10,932	11,079	12,272	12,800	11,932	8,842	9,253	18,469	19,390	18,305
<b>Total income</b>	<b>151,857</b>	<b>153,872</b>	<b>162,250</b>	<b>167,469</b>	<b>161,632</b>	<b>155,306</b>	<b>157,554</b>	<b>166,075</b>	<b>163,871</b>	<b>163,014</b>
Grants as a percentage of total income	61%	62%	63%	64%	63%	63%	58%	54%	52%	52%
Locally-funded income as a percentage of total income	31%	30%	29%	28%	30%	31%	36%	35%	36%	37%

*(Local Government Financial Statistics)*

### **3.3.3 The Distribution of Cuts**

Impact differs between LAs with high expenditure and high reliance on government funding, and LAs with low expenditure and lower reliance on government funds. Disadvantaged areas receive less income per person from council tax as they have a greater proportion of households with exemptions, and have the highest burden of costs for social care as they have more people in need. As such their self-generated income is lower but their expenditure is higher meaning that they are more reliant on government funding. In London, excluding education, LAs spent on average £1868 per person in 2009-2010 compared to £976 per person on average for LAs in the South East (Crawford and Phillips, 2012: 124). In contrast in the same year council tax funded 17.5% of revenue expenditure in London, compared to 33.1% in the South East (Crawford and Phillips, 2012: 128). In addition to greater impact due to reliance, London Boroughs and Metropolitan Districts have faced slightly greater cuts in funding, one reason being the rundown of area-based grants that were aimed at enabling LAs in deprived areas to undertake additional community activities. As a result, LAs in poor, urban areas have more commonly made large cuts, whereas LAs in affluent areas are more likely to have increased spending (Crawford and Phillips, 2012: 133; Fitzgerald and Lupton, 2015: 584; Kennett et al., 2015: 626–629). Similarly, a concern for the business rates retention scheme is that it will leave behind worse-off areas: LAs in well-off areas will generate more income through business rates due their strong economy than less well-off areas, the latter will then suffer as redistribution ends (Harvey, 2016: 8).

The Local Government Association initially estimated that even if authorities are able to make savings of 1-2% per year, the funding gap will be £8.9bn by 2019-2020 (Local Government Association, 2013b: 25). Two years later, they updated their prediction to a gap of £9.5bn (Local Government Association, 2015). As LAs are required to agree a balanced budget each year, this risks some being unable to afford to deliver statutory services (Local Government Association, 2014: 3; National Audit Office, 2016: 4). The NAO report concerns that 56% of Metropolitan Districts and Unitary Authorities will not meet their medium-term savings targets, with 22% of Metropolitan Districts having had difficulty delivering their 2013-2014 budget (National Audit Office, 2014b: 4, 9).

### **3.3.4 Confounding Issues**

Wider impacts of the financial crisis include squeeze on jobs in 'the middle', with both the number of top level and poorly paid jobs increasing to the detriment of better paid working class jobs (Clark and Heath, 2014: 71; Hastings et al., 2015: 602; Joyce and

Sibieta, 2012: 1). As a result, more people are earning less for longer, staying in minimum wage jobs with fewer opportunities to progress. Further, the value of the minimum wage went down 6% in real terms between 2009 and 2012. Cumulatively this means that there are more people classed as poor while working (Clark and Heath, 2014: 73). There has also been an increase in precarious employment, such as temporary and zero hours contracts, and part-time work (Hülsman, 2011: 23; Joyce and Sibieta, 2012: 2). As a result, costs for certain statutory services such as unemployment support have risen, meaning that there is even less left over for other services (Asenova et al., 2015: 6; Hastings et al., 2013: 3, 2015: 602; Jones and Morris, 2010: 4; Local Government Association, 2013b: 16). Further, population aging leads the Local Government Association to estimate that adult social care will account for 90% of LA expenditure by 2020, leaving little for other statutory services and likely none for discretionary services (Lowndes and McCaughie, 2013: 534).

Other government policies have been presented as giving LAs and communities more power to act and focus on local needs, such as the Localism Act 2011 (Bridge et al., 2013: 306). This is something that LAs have been requesting for many years but others see it as an continuation of a long-running shift of risk from corporations and central government to local government and individuals (Bailey et al., 2015: 571; Hastings et al., 2015: 615; Kennett et al., 2015: 622). Either way, this can be seen as problematic as such change can be particularly difficult to implement when also dealing with fewer resources than were previously available (Asenova et al., 2015: 6; Hastings et al., 2015: 602; John, 2014: 697). Further, the NAO found that despite the policy of enabling LAs to address local priorities, central demands about how they spend grants remained in different forms and created difficulty for LAs (National Audit Office, 2014a: 10). In comparison to private sector organisations, LAs have a great number of constraints both in their ability to generate resources and their ability to control goals and stakeholders. These make dealing with cuts more difficult as they cannot change direction in the same way as a private company (Ashman, 2015: 110).

### *Devolution and Big Society*

The new government formed in 2010 promoted the idea of the 'Big Society'. Big Society called for a shift of responsibility and therefore resources, away from the government and towards individuals (Pharoah, 2012: 116). While largely a rhetorical construct, this meant replacing public spending with charitable service provision through more individual members of society contributing their time and money, therefore using voluntary action as the primary means of addressing social issues

(Clifford et al., 2013: 960; Szreter, 2012: 30). LAs were key in this agenda and were encouraged to consider alternative methods of delivering services, such as through mutuals and co-operatives (Fitzgerald et al., 2013: 2; Helm, 2013: 3; Lowndes and McCaughie, 2013: 534; National Audit Office, 2014b: 8; House of Commons and Communities and Local Government Committee, 2012: 3).

To foster innovative delivery methods and encourage local participation along these lines, the government passed the Localism Act 2011. Localism is the devolution of power from central to local governments, the market and society with the rationale that it makes the apparatus of the state more directly accountable to the people (Davoudi and Madanipour, 2015: 1–2). Localism is intended to stimulate local economic growth by enabling autonomy and encouraging competition between localities (Lowndes and Gardner, 2016: 358; Newman, 2014). Through this legislation, the Conservative-Liberal Democrat Coalition Government nominally gave LAs discretion to develop services according to local needs by cutting targets and audits. However, they were criticised for reducing funding and attaching 'strings' to grants that stifled local ambition in practice (Asenova et al., 2015: 6; Department for Communities and Local Government, 2011a: 1; John, 2014: 697; Pipe, 2013: 4). Greater Manchester was the first area to pilot regional devolution, with the Greater Manchester Combined Authority established in 2009 and given devolved powers, such as the ability to earn back business rates in 2014 (Lowndes and Gardner, 2016: 362).

Devolution was furthered in May 2017, with mayors elected in 6 regions creating combined authorities of the region's councils (Department for Communities and Local Government, 2017b: 3). Mayors are allowed to add an additional charge to council tax to pay for their work, and can raise additional funds from businesses for infrastructure projects (Department for Communities and Local Government, 2017b: 6). A similar deal was established in Cornwall, but without a combined authority, meaning that the existing authorities must manage the new responsibilities through their existing structure and relationships (Department for Communities and Local Government, 2017a: 3). Further, the additional council tax and business rates were not authorised, with the area instead taking part in piloting the business rates retention scheme (Department for Communities and Local Government, 2017a: 6).

There are many criticisms of the Big Society concept. Both academic and sectoral commentators have noted that charitable activity can only function effectively when local government is strong enough to take a co-ordinating role; that affluent communities have larger pools of volunteers, meaning that it is difficult to redistribute services to where they are needed; that the nature of individual charitable activity has

fundamentally changed from active to passive, with large-scale professionally run charities being the sectoral norm, meaning that the type of responsive, local participation called for in Big Society has been lost (Hilton, 2012: 82; Jones et al., 2016: 2067; Ockenden et al., 2012: 157; Szreter, 2012: 41). Liverpool was originally a pilot area for Big Society, but withdrew having found that the scale of cuts meant that the voluntary organisations central to the policy could not be supported (Lowndes and Pratchett, 2012: 30). Rees argues that Big Society was vague and simply an excuse to shrink the 'state' (Rees, 2014: 50). While the 2011 Localism Act meant that LAs could in theory do anything that they thought would benefit the area, in practice they remain funded largely through the central government and are required to delivery statutory services in austere conditions meaning that they have little scope for local innovation (Ferry and Eckersley, 2015: 204). Further, it means that responsibility for making challenging cuts in spending is deferred to local councils, thus shifting blame from the central government to local government (Lowndes and Gardner, 2016: 358).

The Coalition government lessened the audit requirements of New Labour, meaning that LA performance is assessed in terms of delivering a balanced budget rather than delivering outputs and outcomes (Ferry and Eckersley, 2015: 204). In combination with regional devolution and increased regional variation, this means that the outcomes of funding cuts will be obscured particularly as they relate to comparison between areas (Ferry and Eckersley, 2015: 207; Lowndes and Gardner, 2016: 364; Lowndes and Pratchett, 2012: 36). Localities will therefore be blamed for their failures, but the failures will be hidden from public view (Lowndes and Pratchett, 2012: 36).

### ***3.3.5 Reported Impacts and Expectations***

In the first two years of fiscal austerity, cuts targeted discretionary services and protected statutory services, but more recent cuts have come from adult social care suggesting that formerly protected services are beginning to feel the impact of the situation (Fitzgerald et al., 2013: 2; National Audit Office, 2014b: 8). For example, adult social care spending decreased by 8.6% nationally between 2010-2011 and 2015-2016 (National Audit Office, 2016: 7). Initially, planning and development services, particularly economic and community development programmes, received the largest cuts, with spending being on average 43% lower in 2011-2012 than in 2009-2010 (Crawford and Phillips, 2012: 124, 135; Fitzgerald et al., 2013: 2; National Audit Office, 2014b: 8). Culture and leisure services, which includes museums, has also been badly affected, with expenditure in real terms lower in 2011-2012 than it had been in 2001-2 (Crawford and Phillips, 2012: 124; Fitzgerald et al., 2013: 2). By 2016, cultural services

had suffered lesser cuts than planning and development services, but still saw a drop of 36% between 2010-2011 and 2015-2016, well above that of statutory services (National Audit Office, 2016: 7).

Variation in different aspects of service areas has been noted. For example within environmental and regulatory services, community safety expenditure fell 47.1% compared to only 11.7% for waste services. This means that analysis of the cuts needs to be done at a sub-service level (Crawford and Phillips, 2012: 9).

The impacts of fiscal austerity are thought to have had the greatest effect on those that relied most heavily on public resources, with the distributions of impacts across the UK reported to be related to social class (Langley, 2015: 148; Lowndes and McCaughie, 2013: 534). Though some report that 'pro-rich' services have seen more cuts they agree that vulnerable and disadvantaged groups feel the impact of service reductions more as they are more reliant on them to begin with (Asenova et al., 2015: 7; Department for Communities and Local Government, 2013a: 7). A 2014 study found that by 2015-2016 the average person will have seen £1126 per year in cuts to the services they use, whereas those on a low income will have suffered £2744, the disabled £4660, and those using social care £6049 (Duffy, 2014: 16).

The success of dealing with the cuts is difficult to ascertain. While one can see whether budget reductions have been met, the impact of quantity and quality of service is difficult to assess (Ashman, 2015: 111). Though studies of specific authorities have found efficiency savings to be the key strategy for LAs so far, the NAO found very little data on LA activities on a national comparable level and therefore report that it is not possible to see how successfully savings have come from efficiencies rather than service reductions (Fitzgerald and Lupton, 2015: 583; National Audit Office, 2014b: 9). A survey of London Councillors in 2013 found that most thought that services had been affected, but both an Ipsos MORI study and a PwC survey found that two-thirds of residents had not noticed a change to services (Fitzgerald and Lupton, 2015: 583; Gardner, 2017: 150).

The NAO report that plans for making further savings are patchy with some LAs not knowing what they will do and others planning to implement untested structures and delivery models (National Audit Office, 2014b: 10). The Local Government Association expects that LAs will draw up to 5% of their reserves each year to cover the gap in funding (Local Government Association, 2013b: 10, 25). While many have made an effort to increase their reserves, The Department for Communities and Local Government reported in 2013 that the amount in reserves actually only represented 2



months' worth of operating costs (Department for Communities and Local Government, 2013a: 4).

### **3.4 Reported Impact on Local Authority Museums**

#### ***3.4.1 Local Authority Museums under the Coalition Government***

The Coalition stated that they would have a 'light touch' on the direction of the Arts, perhaps in opposition to the strategy and target-heavy New Labour approach. However, debates surrounding cuts to local government funding suggested that the Arts were seen as unimportant by central government (Heal, 2013: 164). In addressing spending cuts, then Culture Secretary Jeremy Hunt reduced staffing within DCMS and moved the department into the office space of another department. Gordon et al. argue that this can be seen as either a policy of reduced interventionism, or marginalisation of culture within government (2015: 51).

Parliament acknowledged that the cuts would have a major impact on cultural organisations, but argued that better financial management would help, and encouraged museums to look for funding from other areas, such as through engaging in commercial activities and fundraising (House of Commons and Culture, Media and Sport Committee, 2011: 3–5). Advice was produced for cultural organisations about how they could win contracts to deliver elements of public health and social care services (Bagwell et al., 2014; Kelly and Bond, 2010). Parliament acknowledged that it was easier for organisations in London and other metropolitan areas to raise commercial and philanthropic funds, and that philanthropic culture was lacking in the UK compared to the USA (House of Commons and Culture, Media and Sport Committee, 2011: 5). National Museums Liverpool, in piloting a Big Society scheme, found that the voluntary organisations they needed to collaborate with were weakened by public spending cuts as well (Heal, 2013: 165).

A further major development was the policy of 'quangocide', in which the coalition reduced the number of non-departmental public bodies by around 200 (Dommatt and Flinders, 2015: 13–14; Gordon et al., 2015: 51). The MLA was abolished and its remit for museums passed to ACE. This move was questioned in Parliament due to the cuts that ACE was enduring itself at the time (House of Commons and Culture, Media and Sport Committee, 2011: 4). Further, questions were raised in the sector about the compatibility of ACE with museums given the differences between museums and the wider arts sector (Heal, 2013: 168). For example, Babbidge feels that ACE is unsuited

for supporting museum standards and values due to its primary function being grant giving (2015: 24).

Taking over responsibility for museums in 2011, ACE stated goals related to quality, accessibility and economic sustainability in museums (Arts Council England, 2011: 7–8). Reflecting the fiscal situation, their focus was on economic pressures and they presented a two-pronged approach to sustainability. Firstly, arguing that museums must shore up their public value and relevance through innovation and service development, such as improving their use of digital media, and exploring roles such as in lifelong learning for older people. Secondly, sustainability in terms of business model would involve diversified income streams and more private giving, with more effective use of volunteers to reduce costs or increase services, while investigating potential for economies of scale (Arts Council England, 2011: 10–12).

Then Chancellor George Osborne preserved funding to DCMS as far as possible (Bull, 2015: 47). In turn, ACE was required to focus cuts on administration and preserve its grants to funded organisations. However, Bull argues that by cutting administration, the organisation was less able to be effective in its support role (2015: 47).

Fiscal austerity and related changes to LA funding continued under the Conservative government elected in May 2015. The DCMS White Paper on culture published in March 2016 retained focus on the place-making role of culture in both social and economic terms (DCMS, 2016: 6). It positioned national agencies in a role of encouraging local initiatives while pursuing a ‘soft power’ agenda on a national scale (DCMS, 2016: 9–10). Local initiative with government encouragement continued in relation to funding, with the paper agreeing with the principle of mixed funding streams while acknowledging that there are ways that the government could make this more viable with tax relief for donors and VAT refunds for cultural organisations (DCMS, 2016: 11).

### ***3.4.2 The Impacts of Austerity on Local Authority Museums***

Three organisations have undertaken specific studies of the impacts of public spending cuts on LAMs. The MA have completed a survey each year since 2011, that asks museums to report their level of cuts, the effect on staffing and changes in activities (Evans, 2012, 2013, Museums Association, 2014, 2015; Newman and Tourle, 2011). The reports of these surveys are mostly quantitative with some qualitative commentary. The Local Government Association carried out a survey of LAMs in September 2016 in order to submit evidence for DCMS’s review of Museums. They contacted heads of cultural services and had 83 responses to an online survey (Local Government

Association, 2016). ACE commissioned a more in-depth study that comprised a literature review, analysis of Department for Communities and Local Government data, and consultation with 20 LAMs (TBR et al., 2015).

As anticipated, the MA survey has found a trend for budget cuts, with 72.5% of responding LAMs reporting them in 2011, in comparison to their 2010 budget, 60% in 2012 and 55% in 2014 (Evans, 2012: 7; Museums Association, 2014: 6; Newman and Tourle, 2011: 7). While cuts appeared to be slowing in 2013, they increased in severity again in 2014 (Evans, 2013; Museums Association, 2014). Unfortunately, not all data are reported separately for the subset of LAMs, making it difficult to understand whether the impacts are different for this type of museum compared to others. Further, the reporting does not enable analysis of cumulative cuts across the years of the survey as it is not noted where respondents have contributed year on year, meaning that it is unclear whether museums have faced ongoing cuts, or if it is a different set each year.

The MA surveys do appear to show that some services have been reduced due to cuts, with opening hours, events and outreach commonly reported as areas affected. However, a larger proportion of museums report that their activities will remain the same (Evans, 2013: 12; Museums Association, 2014: 9, 2015: 9–10). In comparison, income generation is reported as an area that museums are increasingly focusing on (Evans, 2012: 12, 2013: 16, Museums Association, 2014: 16, 2015: 11). The percentage that reported that they had successfully increased their earned income, however, is lower than the percentage that reported that they would be focusing on doing so in earlier years, suggesting that some had been unsuccessful. For example, in 2013, nearly 70% of respondents said that they would focus on fundraising and generating income but, in 2014, only 35% reported that their self-generated income had increased (Evans, 2013: 16; Museums Association, 2014: 8). Further, for LAMs, between 2014 and 2015, overall income fell 2% on average, with any increase in self-generated income not matching the decline in public funding (Museums Association, 2015: 7).

The findings of the Local Government Association are similar. The majority of the respondents reported that the museum services of their LA had been reviewed, with the outcome for around 40% being reduced staffing and/or reduced opening hours (Local Government Association, 2016: 8).

The ACE report found that LAMs had initially suffered lower cuts than other LA cultural services but that they were beginning to catch up (TBR et al., 2015: 13). Whether this

is due to LA desire to preserve museum services is something I will consider in later sections, but one alternative possibility is that other services in this category have greater potential for self-generated income, such as leisure centres where an entry fee is usually charged, meaning that it has been possible to apply cuts in these areas more easily without reducing service provision. The ACE report found that while LAMs were largely surviving so far and often increasing their income from other sources, that they often had fewer staff and reduced opening hours (TBR et al., 2015: 9). They find that expenditure on museums and galleries in 2013-2014 was 7% lower in real terms than in 2003-2004, and conclude that pressure to reduce budgets will increase (TBR et al., 2015: 13–14). As such the ACE report focused on factors that influenced the resilience of LAMs and the conclusions of this work will be considered in later sections.

In a scenario-based exercise reported by professional services firm PwC (formerly known as PricewaterhouseCoopers) in which two teams of councillors debated how they would cut costs for a theoretical LA, both teams set up Trust models for cultural services (Manning, 2013: 5, 20). However, they found it likely that if the cuts continue as planned, LA funding for leisure, recreation and cultural services will stop completely meaning that these Trusts would not receive LA funding as is common for independent museums at present (Manning, 2013: 5, 20).

In the previous chapter it was clear that LAMs have continually struggled financially. The current economic situation may exacerbate the issue. If LAMs have been slow to take on the message that they should diversify their funding, it may be that current government policy will force the issue and change to the sector will quicken. Indeed, the ACE commissioned study found that LAMs are now successfully increasing their income from other sources, but were cutting services as well (TBR et al., 2015: 9). My analysis will clarify how LAMs are reacting to funding cuts in terms of income diversification and will consider the impact of any developments.

### **3.5 Summary**

In this section I have summarised the political and economic context of this research. I first introduced the causes and consequences of the financial crisis, looking at how loss of confidence in the high-risk activities of the banking sector resulted in a dramatic reduction in the availability of credit and therefore a cash-flow issue for the institutions. With the impact of the failure of the banking sector deemed too big, many banks received bail-outs from the government, but this increased sovereign debt and drew attention to national budget deficits. In the UK, the Conservative party campaigned and won the 2010 general election on a policy of fiscal austerity, which in practice meant

reducing public expenditure in order to reduce the budget deficit. Considering the private sector more efficient, they hoped that resultant gaps in public provision would be filled by private provision. Elected for a second term in 2015, the Conservatives continued along this path.

Whether fiscal austerity is considered the right response to the economic crisis or not, it is having a clear effect on LA finances with reduced funding from central government combined with changes to budgetary regulations and local tax mechanisms leading to reduced spending power. Though LAs have reportedly been successful in finding efficiency savings so far, concern is growing that they are running out of options. Government policy is for LAs to be entirely self-funded by 2020 meaning that LAs must find innovative ways to increase their income and reduce their spending.

Being discretionary services, many LAMs have received substantial cuts to their public funding due to this situation. As reported by the MA, changes to services have included reduced staffing, opening hours and outreach activities, and focus has turned to generating income from alternative sources. While LAMs appear to have suffered less than other LA cultural services so far, LAs are expected to continue to cut their spending and there has been consideration of a drastic scenario in which there is no local government provision of cultural services at all. Despite this, current research on LAMs is scarce with the annual MA survey providing a snapshot but not enabling a more comprehensive analysis of trends. Due to the continuation of cuts, this study is important in analysing the impact on LAMs, providing much greater depth than the ACE-commissioned study.

Having understood the political and economic context and introduced existing work on the topic, the next chapter will explore the theoretical basis of the study. I will look at the economics of museums to understand why they require subsidy before considering organisational behaviour and organisational change within museums. In combination, these chapters form a solid background to analyse new data on the impact of the ongoing economic situation on LAMs.

# 4 The Value, Economics and Behaviour of Museums

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Traditionally, museums in the UK have received some sort of subsidy to support their operations. This subsidy has taken the form of both annual revenue grants to support day to day operations and one-off capital grants to enable development. Subsidy has come from local government, the national government, private benefactors, charitable organisations, and corporate sponsors. In this chapter, I explore the rationale for subsidy through cultural economic theory both in terms of why it is desired and why it is required. I cover both supply and demand for museums and consider the impact of valuing museums. I then begin to explore organisational change, first looking at how local authorities in England are responding to cuts in public funding and then theorising how LAMs are likely to respond to the cuts passed on to them. In particular, I cover the barriers to change and challenges faced by LAMs and consider how different forms of subsidy influence the behaviour of museums. I conclude by discussing the impact of valuation on behaviour and change in museums.

## 4.1 Demand for Museums

### 4.1.1 *Private Demand*

Private demand comes from individuals or groups choosing to visit a museum for recreational or educational purposes. Museums are an acquired taste, meaning that one must experience them in order to develop a taste for them (Peacock and Rizzo, 2008: 23). In fact, the utility that an individual derives from consuming cultural goods is thought to increase with experience, so the more you visit museums the more you derive benefits, such as enjoyment, from doing so (Heilbrun and Gray, 2001: 102; van der Ploeg, 2006: 1197–1198). As such, if an individual grew up visiting museums, they are likely to want to continue to do so, whereas an individual who did not is unlikely to choose to visit of their own accord.

In market theory, consumers have to be fully informed about the options available to them to make optimal choices for the market to function. Due to this lack of experience from non-users they are considered uninformed and unable to make optimal decisions. As a result, the market fails to support museums as many potential consumers do not know that they wish to consume (Creigh-Tyte and Stiven, 2001: 176; Heilbrun and Gray, 2001: 236–237). This market failure is one justification for subsidy: it enables

museums to offer free or low cost access and thus is supposed to facilitate access for those that do not yet have the taste for museums (Baumol, 2003: 21; Towse, 2002: 5).

#### **4.1.2 Social Demand - Valuing Museums**

The use of public funds positions museums as public services:

The existence of public services reflects a social consensus that certain services are valued, provide identifiable benefits for end-users and should be equally available to all members of a population. (Scott, 2010: 723).

So, the use of public funds to subsidise museums leads one to assume that they are valued and provide benefits. In this section I consider these values and benefits, which can roughly be divided into intrinsic and instrumental categories.

##### *Intrinsic Value*

Advocates argue that museums are intrinsically good and can therefore be categorised as 'merit goods'. A merit good is one that:

[...] society has decided would be desirable to purchase in quantities greater than consumers would wish to purchase at market prices. (Heilbrun and Gray, 2001: 242).

The benefits of merit goods may be their educational value or because they promote a sense of wellbeing (Frey and Meier, 2006b: 1027). The use of public subsidy to enable access to uninformed consumers is therefore justified, as it is not just that they do not yet know that they would like to consume the good, but also that they do not yet know that it is good for them.

Social demand is also based on the idea that museums create value beyond that gained by individuals who choose to visit. In cultural economics these values are called non-use or passive-use values, and have been categorised as:

- Option value: people value the possibility that they could visit the museum at the some point in the future.
- Existence value: people value knowing that the museum exists, even if they do not ever plan on visiting it themselves.
- Bequest value: people value knowing that their descendants will have the option of visiting the museum. Clearly, future generations cannot express a preference in the present and therefore bequest value is the value that

people now put on knowing that their descendants will have access to museums (Johnson and Thomas, 1998: 76; Peacock, 2006: 1133). Baumol argues that people do not want future generations to see them as a 'society of philistines' and therefore feel obliged to care for the Arts in order to protect their reputation (Baumol, 2003: 22).

- Prestige value: people value knowing that the museum is also valued by people from outside of their community, as this gives a sense of pride
- Education value: people value knowing that the museum enables others to learn about their culture

(Frey and Meier, 2006b: 1022–1023; Throsby and Rizzo, 2006: 996)

A museum cannot be financially compensated for these values through a market mechanism, as they are often held by non-users and there is no way to force non-users to directly pay (Frey and Meier, 2006b: 1022). In this sense, museums are said to have some 'public good' characteristics. Public goods are:

- Non-rival - use by an individual does not reduce availability of the good for anyone else
- Non-excludable - you cannot exclude anyone from using the good

(Creigh-Tyte and Stiven, 2001: 175).

Street lighting is an example of a public good. Everyone can use it because it is in a public space, and disregarding congestion, an individual benefiting from street lighting does not stop another individual from benefiting from it (Peacock and Rizzo, 2008: 18). You cannot make individuals pay for street lighting through a market as there is no way to force those that do not want to pay to do so as it is in a public setting. As such, it is theorised that the market under-provides public goods due to the 'free-riders' that do not wish to pay. This is one argument for public subsidy: it forces free-riders to pay through taxes.

### *Instrumental Value*

Governments can justify subsidy where it produces outcomes that contribute to a broader agenda. This is instrumental value: created when assets are used to achieve something else. Museums have been associated with a wide range of instrumental outcomes.

Museums have an economic role. They provide jobs themselves and through attracting visitors to a locale they encourage spending in complementary industries, such as



hotels and restaurants, which in turn spend in other industries and pay taxes (Frey and Meier, 2006b: 1023, 2006a: 403). They make localities attractive, which attracts businesses and workers (Archibald, 2006: 270). Politicians and advocacy groups commonly cite economic benefits in justifying the subsidy of museums (e.g. DCMS, 2011; Heritage Lottery Fund, 2010; Local Government Association, 2013a; Oxford Economics, 2013).

Cultural assets are used politically to build international relationships by encouraging mutual understanding and to build power by demonstrating supposed cultural superiority (Nisbett, 2013: 557–8; NMDC, 2010). Soft Power, as this is called, is thought to build international reputation that amongst other things can encourage international businesses to locate in the country (British Academy, 2014: 26)

Matarasso's 'Use or Ornament' documented social benefits of the Arts and argued that it was not a 'soft option' but rather that public investment in arts programmes was a powerful and cost effective social policy (Matarasso, 1997: vi). The report pointed to individual growth, such as growth in confidence, skills and educational attainment, and community growth, in terms of creating networks and encouraging mutual understanding, from participation in the Arts, which contribute to community cohesion and capacity (Matarasso, 1997: vi).

### ***4.1.3 The Impact of Valuation***

As described above, the value of museums is used to justify the use of public funds to sustain them. However, there has long been debate about the appropriate way to value them, particularly about how their values are presented in public policy. The way in which museums are valued impacts their ability to win public funding, but also impacts their activities, which in turn impacts the value they create. Intrinsic arguments can be elitist and esoteric. While they allow museums to focus on producing cultural value, as they uniquely can, they can be uncompetitive in public policy. Instrumental arguments can be more easily communicated and more appropriate in in public policy. They may undermine cultural value, but may also be used pragmatically by the sector to enable the creation of intrinsic value. Further, they assume that museums are the best option for delivery of the instrumental outcomes, which may not be the case.

#### *Intrinsic Value*

Using intrinsic value to categorise museums as a merit good, and therefore worthy of subsidy is based on the premise that it facilitates access to non-users so that they can benefit. However, if an individual does not have a taste for visiting museums they are

unlikely to do so even if it is offered for free due to public subsidy (Heilbrun and Gray, 2001: 102). The individuals are not choosing not to visit because the museum is too expensive; they are not visiting because they do not have the desire to do so. Subsidy for museums can therefore be seen as a reverse 'robin hood' practice, where everyone is taxed to pay for the tastes of a small, usually privileged portion of society (Baumol, 2003: 21; Frey and Steiner, 2012: 225; Heilbrun and Gray, 2001: 240). Though, it is also the case that those with a higher income pay more tax (Heilbrun and Gray, 2001: 240).

Subsidy for the Arts based on intrinsic value necessitates decision making about what is and is not worthy of subsidy. The distribution of subsidy is decided upon by politicians and public managers, meaning that their opinion of what is worthy is imposed on the public (Peacock and Rizzo, 2008: 10–11; Towse, 2002: 5). Jowell and McMaster, for example, argued that 'good' or 'excellent' culture is superior to popular culture and that a government should invest in the former and then work to make it accessible to all (Street, 2011: 385–6). What counts as 'good' culture is difficult to define. They consider it to be complex; not simply entertaining but making demands on the audience (Street, 2011: 382). In McMaster's 'Supporting Excellence in the Arts' he states:

The best definition of excellence I have heard is that excellence in culture occurs when an experience affects and changes an individual. An excellent cultural experience goes to the root of living. (McMaster, 2008: 9)

This is meant to discount popular culture – that which has mass appeal and commercial success (Chandler et al., 2011) - though surely experiencing popular culture can affect and change an individual, may have educational value or promote a sense of well-being.

For a government, this creates conflict between doing what 'the people' want - what is popular - and doing what they believe is right for 'the people' (Street, 2011: 383). The latter is justified by the idea that people do not always know what is good for them. It has been argued that the government and public managers have an important role in shaping public preferences (Blaug et al., 2006: 7).

However, this is a paternalistic practice, where the interests of a small subset of people are imposed on everyone else with the argument that it is for their own good (van der Ploeg, 2006: 1198). It can also be an elitist practice that reinforces social inequality by favouring the tastes of a small, wealthy portion of society (Snowball, 2008: 8). Though

touted in instrumental arguments for their potential to break down inequality and social exclusion, if museums reproduce social divisions they can reinforce them (Newman, 2013: 122). McMaster's idea was that performance in the Arts sector should be judged by experts, artists and professionals in the industry. This was not universally accepted in the sector, with Tyne and Wear Archives and Museums (TWAM) arguing that they saw their role as working to satisfy stakeholders rather than peers (Graham, 2009: 327).

Justifying the subsidy of museums due to their intrinsic goodness, then, can be discredited as paternalistic and of benefit to the elite over the majority of society. The difficulty of utilising intrinsic value is compounded by the difficulty of defining and talking about the intrinsic goodness of museums. This is a topic that Holden grappled with in 'Capturing Cultural Value', arguing that the issue is that we lack the appropriate language to discuss intrinsic value (Holden, 2004):

But they have a further problem: they have lost the vocabulary to make their case. The postmodern questioning of concepts such as beauty, truth, delight, transcendence and the like, coupled with the insight that these ideas are temporally and geographically specific, have made using them in debate an embarrassment at best, contemptible at worst.

(Holden, 2004: 23)

Intrinsic value is intangible and personal, it can be aesthetic or spiritual, and it is thought to enrich life (Holden, 2004: 22–23; Snowball, 2008: 14). Attempts to talk about why these things are important often make connections to instrumental values. For example in *Government and the Value of Culture*, Tessa Jowell both argues against the instrumentalisation of the Arts and describes the potential of the Arts to help disadvantaged people (Belfiore, 2009: 350; Jowell, 2004). A RAND report on intrinsic values describes them as 'satisfying in themselves' but continues to describe how they lead to community benefits (McCarthy, 2004: xv). For example, they categorise expanded capacity for empathy as an intrinsic benefit of the Arts, but then explain that this can make people more receptive to different cultures and attitudes in society (McCarthy, 2004: xvi). Other commentators explicitly connect intrinsic value to instrumental outcomes:

If intrinsic impact is at the root of the system of arts benefits... then policy-makers need a stronger understanding of how intrinsic benefits translate into instrumental outcomes. (Brown and Novak-Leonard, 2013: 231).

This represents the difficulty of expressing this value in a way that connects with policy making. However, I argue that, in practice, intrinsic value is only important in public policy if it is connected with instrumental outcomes. To fund the Arts based on intrinsic goodness would be to apply different rules to the sector than to every other part of the public sector where instrumental outcomes are expected (Belfiore, 2009: 351). For example, while individual wellbeing may be an accepted intrinsic value, a government may only be interested in providing it for their citizens if it influences health or employment. Further, some intrinsic values are long term, such as the non-use bequest value described above, which makes them difficult to prioritise in comparison to immediate concerns (Davies, 1994a: 33). Lacking short-term evidence means that the impact of spending will not be tangibly visible to budget decision-makers, making museums easier targets for cuts (Hugh-Jones, 2014: 219).

### *Instrumental Value*

Instrumental arguments provide a more tangible picture of the value of museums than intrinsic value, particularly to those from outside the museum field. When competing against other sectors for subsidy, being able to provide instrumental evidence of value can provide a compelling argument for support to politicians and public managers (Bluestone et al., 1999: 19). The use of economic arguments, for example, originated in the 1980s, with the Arts Council increasingly using them through the decade as intrinsic arguments began to have less impact in the face of the government focus on efficient and effective public spending (Selwood, 2010: 74–75). Myerscough's seminal work in the mid-1980s set the trend for Economic Impact Assessments (EIAs) of the Arts, as he stated that 'cultural goods and services' represented 5% of consumer spending and 2% of employment in the UK (Myerscough, 1988: 148; Selwood, 2010: 75).

However, instrumentalism is thought to have harmful effects on cultural sector such as loss of artistic quality, intellectual integrity and increased bureaucracy with those allocated funding being those that can 'play the game' (Holden, 2004: 14; Nisbett, 2013: 558–9; Silverman, 2010: 3). Justifying subsidy based on instrumental value means that what is provided is influenced by social and economic agendas (Holden, 2006: 21). Cultural organisations are perceived as neglecting their intrinsic values by contributing to these agendas in order to receive public funds (Bunting, 2008: 323). Frey and Meier argue that museums are supposed to provide cultural services, not stimulate the economy. They believe that museums should focus on producing the

cultural values that no other industry can (Frey and Meier, 2006b: 1024, 2006a: 403–404).

On the other hand, in Chapter Two I showed that many values have been ascribed to museums over time and found many that are instrumental. There is not a clear transition from an intrinsic to an instrumental role for museums, with civic and educational roles being early justifications for their establishment (Graham, 2009: 326; Silverman, 2010: 5, 8–9). Can a museum be neglecting its intrinsic value if it was founded for an instrumental purpose?

Cultural organisations can also be seen as exploiting instrumentalism for their own gain (Bunting, 2008: 323–324). Nisbett reports on professionals in the cultural sector matching government policy to their existing activities and persuading government of the connection thereby leveraging funding and support (Nisbett, 2013: 568). Davies argues that local authority museums receiving a small grant for their intrinsic value can pragmatically lobby for more funds for instrumental values, such as contribution to education or social service. The additional funds could benefit the core functions and strengthen the position of the museum in the long term due to apparent willingness to make a broader contribution (Davies, 2008: 260). Belfiore finds government ministers complicit in this exploitation, reporting a confession from former Secretary of State for Culture, Chris Smith, that he used data strategically to connect the Arts to wider government priorities, thus boosting their profile and therefore funding (2009: 349). Instrumentalism, then, could be a pragmatic strategy adopted by the sector to bolster the core functions that reflect their intrinsic value, rather than a strategy that subverts intrinsic value, or solely a top-down strategy. However, an ACE survey from 2006 found a decrease in core functions such as acquisitions and collections research and an increase in outreach and marketing (Mirza, 2011: 71). Even if instrumentalism is a bottom-up strategy, then, it still appears to have an impact on intrinsic value creation.

Another issue with using instrumental value as a justification for public subsidy is that museums are not necessarily competitive in terms of outcomes. From an economic point of view, for example, there are likely to be other industries that would provide greater return on investment (Frey and Meier, 2006b: 1024, 2006a: 403). It is possible that a museum is the best option in some cases, but relying on instrumental value could lead to geographical inequality of provision. Further, the question of whether a museum is the most competitive use of public funding should be advanced: claiming funds for the museum sector diverts it away from other vital areas. In terms of its social impact it has been criticised as being a 'displacement activity' rather than tackling the root cause of the social issues (Mirza, 2011: 70; Silverman, 2010: 3).

#### **4.1.4 Capturing Value**

Public policy demands evidence on the museums sector to confirm that it does indeed hold value and to enable comparison against other sectors when distributing public funds. There has been much debate over how the value of museums can be captured, if it can at all.

##### *Intrinsic Value*

I have shown that intrinsic value is intangible and personal. Individuals may unconsciously value museums, meaning that they could not articulate the value if asked (Stanziola, 2008: 319). It has been argued that intrinsic value cannot and should not be quantified, that it is distasteful to put monetary value on it (Snowball, 2008: 3). However:

There is a contradiction between the plea that the intrinsic value of the Arts should be accounted for, and the idea that it is beyond accounting. (Bakhshi et al., 2009: 15).

Stanziola argues that one can capture proxies to provide a partial picture of the unconscious valuation. For example, one can find out how far a person travelled to visit the museum, or how long they stayed (Stanziola, 2008: 319). Further, cultural economists argue that non-use value can be quantified in monetary terms using economic techniques such as Contingent Valuation (CV). CV techniques include Willingness-To-Pay and Willingness-To-Accept studies whereby members of the public are asked hypothetical questions about their preferences (Frey, 1997: 235; Frey and Meier, 2006b: 1023; Throsby and Rizzo, 2006: 997; Towse, 2002: 14). They may be asked, for example, how much they are willing to pay in taxes to ensure a museum stays open, or conversely whether they would be willing to accept the closure of a museum if it meant that their taxes were reduced. There have been CV studies undertaken that have come to the conclusion that non-users do derive value from the existence of the Arts and that they are willing to pay for them out of their taxes (Bakhshi et al., 2009: 9; Frey, 2000: 103–104; van der Ploeg, 2006: 1198). By undertaking economic studies and providing a financial figure for the value of the Arts, comparison with other sectors is enabled that is accountable to the public rather than the political elite, and an assessment is provided of the loss to society if the Arts are not funded (Bakhshi et al., 2009: 3–4).

However, Hewison maintains that intrinsic values require qualitative judgements, describing work to generate financial figures as fruitless (Hewison, 2012: 209–2010). A

major criticism of contingent valuation studies is that they are hypothetical and that people tend to be more generous in hypothetical situations (Heilbrun and Gray, 2001: 233; Klamer and Zuidhof, 1999: 34). Frey and Meier, then, suggest looking at evidence from relevant referenda as these show real situations where the public were asked to vote for subsidy (Frey and Meier, 2006b: 1023, 2006a: 403). They note the Swiss 'direct democracy' system, in which enabling citizens to decide how much to give to the Arts and how to distribute the subsidy has not decreased the amount of public assistance and has incentivised an increase in audience-focused services (Frey and Meier, 2006a: 411).

### *Instrumental Value*

Capturing instrumental value is equally complex and controversial. This section shows that qualitative studies are often dismissed for being anecdotal, and quantitative work is challenged for being reductive and failing to demonstrate causality.

Reports on the value of cultural organisations often state that the sector brings many benefits but then admit that the data to evidence these benefits does not exist. For example Ander et al. state that museums contribute to individual and community well-being, but then qualify this contribution as being idiosyncratic and 'potentially significant' due to the difficulty of actually measuring it (2011: 237). The National Museums Directors' Council (NMDC) state that learning in museums contributes to confidence and attainment but to evidence this provide visitor numbers, without explaining how visitor numbers demonstrate increased confidence and attainment (NMDC, 2010). A report from RAND reviewed empirical studies and found cognitive, behavioural and health benefits of the Arts, but also found that weak methods as a characteristic of studies in the area, in that they failed to show that the Arts caused the effects and how different types of arts differ (McCarthy, 2004: xiii–xiv). Within the same year, a DCMS team produced reports stating that the evidence of the benefits of the Arts was lacking and another praising their contribution (Belfiore, 2009: 348). In practice the relationship between individual benefit and societal benefit is assumed, having been neither explored nor explained (Clark and Maeer, 2008: 47; Newman, 2013: 120; Sara Selwood Associates, 2010: 20). As such, reports on the topic tend to be easily dismissible for using anecdotes, such as in the Group for Large Local Authority Museums (GLLAM) report on museums and social inclusion (GLLAM, 2000). Despite a multitude of studies and reports there remains a lack of evidence that satisfies all stakeholders (Bakhshi, 2012: 213).

British models of cultural value are highly utilitarian in comparison to American frameworks (Sara Selwood Associates, 2010: 5). This may reflect the greater proportion of public funding that British museums rely on, in comparison to American museums which largely rely on private funding, and the relative ease of utilising instrumental values in public policy. Certainly, the mid-2000s crusade against instrumentalisation, including contributions from McMaster, Holden and Jowell, did not take hold as DCMS defaulted to quantitative performance measurements, such as visitor numbers and financial performance (Sara Selwood Associates, 2010: 20).

A concern about the British model is that it means that things that can easily be measured become targets whereas less tangible things are ignored (Holden, 2004: 17). A review in the UK found that the outcomes reported as resulting from the Arts were those that most closely fit in to the current framework, suggesting that other outcomes were left unreported (Sara Selwood Associates, 2010: 5). Further, data collection frameworks have resulted in generalised advocacy for the Arts, as a generic framework cannot differentiate between different cultural activities (Sara Selwood Associates, 2010: 5). In practice, value will vary over time, between communities and by activity (Weinberg and Leeman, 2013: 17).

Economic benefits appear easier to evidence than other areas. Compared to their weak association between increased attainment and visitor numbers, when looking at economic benefit the NMDC are able to report that museums have higher proportions of overseas visitors than other attractions and then provide figures showing the economic contribution of overseas visitors (NMDC, 2010). However, EIAs provide only a partial picture of the economic benefits. Museums may contribute to social benefits that result in savings in other areas of public expenditure (Matarasso, 1997: x). For example, hypothetically, visiting museums could encourage attainment that may contribute to employment and therefore reduce reliance on unemployment services, but I have shown above how difficult evidencing this type of benefit has proved to be. Another area neglected by EIAs is opportunity cost: the benefits claimed of the Arts can likely be delivered in different ways that may be cheaper or more effective (McCarthy, 2004: xiv). Evidence can easily be challenged by other sectors.

One reason why capturing the relationship between museums and instrumental benefits is difficult is because they do not deliver the benefits alone; they contribute towards a wider agenda that is delivered by various government departments and non-profit organisations (Holden, 2004: 18; Weinberg and Leeman, 2013: 18). Arguably, an adequate research programme would need to be complex, longitudinal and interdisciplinary, and consider the entire 'ecosystem' of organisations involved



(Stanziola, 2008: 319; Weinberg and Leeman, 2013: 18). Where research is required to provide justification for public subsidy, however, time is in short supply to keep up with changing political priorities (Holden, 2004: 18).

### *Public Value*

In the mid-2000s, the concept of 'Public Value' became popular in the cultural sector. Public Value is a framework for targeting investment in public services and for demonstrating their value (Scott, 2010: 274). The utilisation of the concept in the UK focused on the idea that public sector organisations are there to add or create value for the public and therefore to measure their success one must consider what the public values (Clark and Maeer, 2008: 25).

Public Value is described by Lee et al. as a 'denial of politics' due to its concept that the public knows what they value and managers are the best to deliver it, taking democratically elected politicians out of decision making (Lee et al., 2011: 295–96). In this respect it is an extension of New Public Management, which promoted public consultation but ultimately favoured technical efficiency over publicly authorised targets (Blaug et al., 2006: 6–7; Gray, 2008: 211; O'Brien, 2013: 146). This is appealing to arms-length bodies, such as ACE, as it supports the rationale for their existence, that funding of the Arts should be depoliticised (Lee et al., 2011: 295–96). A criticism of the concept is that it is subject to change in fashion and liable to favour short-term gains over the bigger picture (Lee et al., 2011: 297).

A public value study undertaken by ACE in which focus groups discussed the public funding of the Arts found that the participants recognised the intrinsic value of the Arts, whether they participated in them themselves or not. However, when it came to allocating public funding the participants reverted to instrumental values suggesting that they considered them the appropriate way to spend public money (Bunting, 2008: 326–7). The former finding is similar to CV studies, which have suggested that people who do not participate in the arts value them nonetheless (Bakhshi et al., 2009: 9). Further, public value studies have found that participants value social benefits over the economic contribution of museums (Munley, 2013: 47).

## **4.2 Supply of Museums**

### ***4.2.1 Fixed vs. Marginal Costs***

Museums have high fixed costs and sunk costs (Frey and Meier, 2006b: 1024, 2006a: 399). Sunk costs can be equated to set-up costs; those that have already been

incurred and that cannot be recovered. For a museum these costs recur as the museum must cover them each time they develop a new exhibition, for example (Baumol, 2003: 24).

Fixed costs are also called overheads and are those that do not change in relation to the level of activity in the organisation. For example, a museum must continue to pay to store and care for its collection even if the number of visitors to the museum goes down. Buildings, staff and insurance are other examples of fixed costs (Frey and Meier, 2006b: 1024, 2006a: 399).

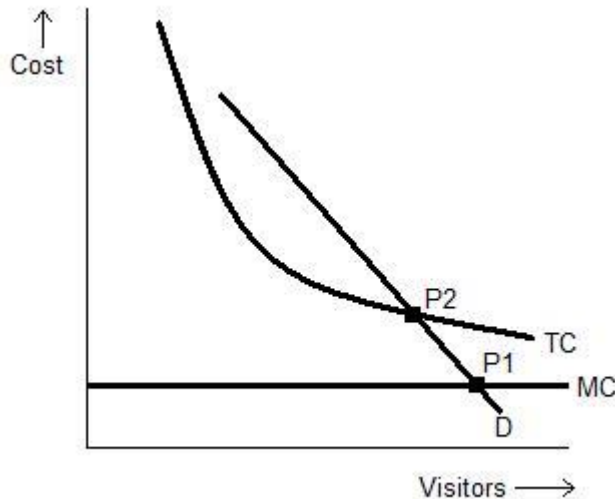
Museums tend to hold far more in their collections than are displayed to the public and stocks grow over time and new items are added (Towse, 2002: 4). As a result, from a cultural point of view, the optimal spending on heritage is 'illimitable', but in reality decisions have to be made about the distribution of limited resources and no organisation will receive as much subsidy as they would like (Peacock and Rizzo, 2008: 4). From an economic efficiency point of view, a business should endeavour to manage its stock to keep costs as low as possible while meeting demand, and therefore the 'inventory' of items in a collection is entirely inefficient (Peacock and Rizzo, 2008: 97). Economists, therefore, often comment on the size of museum collections that are rarely, or never, exhibited (Frey and Meier, 2006b: 1025, 2006a: 405–406; Heilbrun and Gray, 2001: 201–204). From an economic point of view these collections have an 'opportunity cost' due to them having a market value: by retaining the unused items you are missing the opportunity to gain income through selling or finding an alternative use for them (Frey, 1994: 327; Frey and Meier, 2006b: 1025). However, the intrinsic value of collections means that finding a market use for them is unethical.

Museums are considered to have low marginal costs (Frey and Meier, 2006b: 1024, 2006a: 399). These are costs that depend on level of activity. The cost of opening the museum to the public on any particular day is somewhat independent of the number of visitors as most of the costs of opening the museum are fixed costs. As such the marginal cost of each visitor to the museum is close to zero: an additional visitor does not cost the museum much additional expense as they have already spent the money necessary to open (Frey and Meier, 2006b: 1024, 2006a: 399).

Figure 1 illustrates the situation. Line TC represents the average total cost of operating the museum per visitor. This figure includes the fixed costs, such as maintaining the collection, and the marginal cost of admitting each visitor. As fixed costs make up the majority, as the number of visitors goes up the average total cost goes down. Line MC

represents just the marginal cost per visitor. As the marginal cost is close to zero, this line is more or less horizontal with any number of visitors. Line D represents demand for the museum at different prices. As the price goes down the number of visitors goes up as more people are willing to pay the price.

**Figure 1: Representation of Museum Economics**



*Adapted from (Heilbrun and Gray, 2001: 196)*

As illustrated, if a museum charges the marginal cost, P1, they will not cover the total costs and therefore will operate at a deficit. This is because the marginal cost per visitor is close to zero and therefore always lower than the average total cost of operating the museum. If the museum charges a price that covers the total cost, P2, they will have fewer visitors. This is considered a social loss: a portion of potential consumers who would be willing to pay the marginal cost are excluded due to the high price. This is called the Welfare Gap and is one reason that museums are subsidised: to enable them to charge a price that enables access for those that are unwilling, or unable, to pay for the full cost (Baumol, 2003: 24; Heilbrun and Gray, 2001: 235).

Demand for the Arts is considered to be fairly price-inelastic, meaning that demand remains similar as prices increase or decrease, because a small subset have acquired a taste for it and continue to demand it even as the price increases, and the majority of people do not have the taste for it and will not go even if the price is reduced (Frey and Meier, 2006b: 1021, 2006a: 401; Heilbrun and Gray, 2001: 102). As a result it can be argued that prices should be raised so that costs can be covered (Heilbrun and Gray, 2001: 103). However, though Frey had asserted in 2000 that museum could operate in a market on a small scale with a level of supply that would meet demand as a niche product, writing with Meier in 2006 he conceded that there may not be a 'P2' that will

attract enough visitors to cover costs due to the high fixed costs (Frey, 2000: 11; Frey and Meier, 2006b: 1034).

### **4.2.2 Productivity Lag**

Another concern is that museums are considered to suffer from what is known as 'Baumol's Cost Disease' (Camarero et al., 2011: 251). In other areas of the economy, technological advances enable increased productivity in terms of output per hour worked. However, in museums there is less scope for increasing productivity through technology and therefore they are said to suffer from 'productivity lag'. The consequence of technological advances elsewhere in the economy is a rise in wages, and the museums sector must continue to increase wages as well in line with the rest of the economy. This is not to suggest that museum wages will not remain lower than other sectors, just that they will have to rise at a similar rate. As such, costs for museums increase continually (Baumol, 2006: 347; Frey and Meier, 2006a: 400; Heilbrun and Gray, 2001: 137–138).

It has been noted that the increase in productivity elsewhere in the economy leads to a growth in output per capita as production grows faster than population. This leads to a rise in real wages and per capita income. This rise in income creates an increase in living standards and an increase in demand for goods such as the Arts. So, while the price of the Arts does increase according to the cost disease model, society remains able to afford it (Baumol, 2006: 347; Frey and Meier, 2006a: 402; Heilbrun, 2003: 99; Heilbrun and Gray, 2001: 137). Further, an increase in demand for the Arts may make it possible to reduce average costs due to economies of scale: if there is higher demand the costs are spread over more consumers (Heilbrun and Gray, 2001: 147)

Nonetheless, museum costs are theorised to increase faster than other industries due to productivity lag and if they were to raise their prices to match, people with a lower income will be excluded. Museums continually feel under financial pressure to keep their prices low for welfare reasons. Where a museum receives public subsidy, this means that the required level of subsidy will constantly increase. Alternatively, a museum may look for ways to cut costs which could lead to a reduction in quality (Heilbrun and Gray, 2001: 145, 159).

However, in 2006, Frey and Meier reported that there had been no empirical studies of productivity lag in museums and noted that there are many areas that a museum may utilise technological advances. For example, electronic security can be used to reduce the number of security guards required. Other opportunities to cut costs include increasing the use of volunteers and outsourcing (Frey and Meier, 2006b: 1025).

## **4.3 Local Authority Museums, Organisational Behaviour and Change**

### ***4.3.1 Change in Local Authorities***

Academic commentators have speculated whether austerity in LAs will drive innovation or decay in public services, with arguments for both being made (Hastings et al., 2015: 602–603). John sees LAs as adaptive and resilient, pointing to evidence that there have been frequent reports of decline since the 1980s that have not come to fruition, with the central operating system remaining largely intact (John, 2014: 688, 698). However, it is also notable that the cuts have been deeper and quicker than in previous instances, and are paralleled by increasing demand for services particularly in relation to the aging population (Bailey et al., 2015: 571).

In dealing with their reduced funding, LAs have employed a number of strategies. Firstly they have looked for efficiency savings, which is how previous cuts have largely been handled (Lowndes and McCaughie, 2013: 536). These are not supposed to directly affect the front-line service that residents receive but rather change the way services are run to reduce the costs (Fitzgerald et al., 2013: 3; Fitzgerald and Lupton, 2015: 590; Jones and Morris, 2010: 33). For example, some services can be ‘joined up’ with others to deliver economies of scale and scope (Asenova et al., 2015: 7; Bovaird, 2014: 1068–1070).

Though this strategy has been successful in reducing costs so far, both academic and sectoral commentators argue that the majority of efficiency savings have now been made meaning that additional cuts will have to impact the level of service offered, and express concern that changes may not be sustainable due to staff workload increases and low morale (Fitzgerald et al., 2013: 4; Hastings et al., 2013: 3, 22, 25, 2015: 610; Jones and Morris, 2010: 38; Marr and Creelman, 2014: 5). Striving for efficiency savings can be stressful for staff in dealing with the uncertainty of the unfolding situation, they may find that the changes weaken the values that they are working towards, undermining their trust and commitment to the organisation (Ashman, 2015: 110–111). Further, reducing staff can mean the loss of knowledge from long-term staff, which can undermine efficiency (Boedker et al., 2017: 31; Hastings et al., 2015: 610).

Investment as a strategy for stimulating the local economy has been less popular so far (Fitzgerald and Lupton, 2015: 592). The strategy aims to create jobs and to create a desirable environment for other investors, meaning that demand decreases for services such as unemployment benefits and LA income increases from business rates.

Unfortunately, investment is considered to be a long-term strategy and LAs have been

required to find immediate savings (Hastings et al., 2013: 22). Further, austerity exposes local government to increased risk in relation to investment: policy such as business rates retention is intended to encourage individual authorities to find innovative ways to develop their local economy. Such activities are risky, and failure means loss of income to the LA as the loss of business rates redistribution means the loss of a safety net (Bailey et al., 2015: 576). This policy may therefore be a disincentive to investment (Bailey et al., 2015: 576; Department for Communities and Local Government, 2013a: 2). In addition, LAs are bound by legal accountability and transparency requirements, which deter innovation due to the requirement to demonstrate that decisions have been made in a sensible and informed way (van der Voet, 2014: 374). Nonetheless, commercial commentators have advised that investment is essential for LAs as a means of generating income (Grant Thornton, 2013: 7).

Many LAs are now resorting to retrenchment strategies where they reduce services or reduce their role in providing services (Fitzgerald et al., 2013: 3; Fitzgerald and Lupton, 2015: 591; Hastings et al., 2013: 22). Retrenchment can include targeting the most needy by increasing the threshold for inclusion and therefore reducing service users, increasing charges to move the burden from the LA to the user, passing responsibility for services to other organisations, or withdrawing services entirely (Hastings et al., 2015: 611; Lowndes and McCaughie, 2013: 537). It is thought that some LA services could be run more effectively by businesses, charities and social enterprises and that this strategy could avoid duplication between the public, private, and charitable sector, but that some services are better provided in-house (Asenova et al., 2015: 7; Bovaird, 2014: 1069; Grant Thornton, 2013: 7; Jones and Morris, 2010: 34). The Joseph Rowntree Foundation studied three case-study authorities around England and found that in all three there was evidence of retrenchment. This included transferring assets such as leisure centres to community Trusts (Hastings et al., 2013: 30). As museums are discretionary services they are at risk of retrenchment.

A final strategy has been to focus on providing prevention services, those that aim to avoid at-risk citizens from becoming more disadvantaged in order to manage demand for costly services (Fitzgerald et al., 2013: 3; Fitzgerald and Lupton, 2015: 591; Hastings et al., 2013: 4). Case studies show that preventative strategies can be effective in tackling social problems, but they are difficult to prioritise politically because they produce outcomes in the long term rather than within a politician's term in office, or even a public service managers career (Reeder, 2014: 71). In fact, Lowndes and Pratchett have concluded that the general public prioritise short term gain over long

term benefits as well, with referenda resulting in low budget options chosen over community investment (Lowndes and Pratchett, 2012: 28). While there are reports of such initiatives (e.g. Taylor et al., 2013: 23–24), prevention services tend to be discretionary which makes them difficult to prioritise when making cuts (Asenova et al., 2015: 6).

People are not obligated to use cultural resources in the same way as they are obligated to send their children to school; they choose to use cultural and other recreational resources (Holden, 2006: 18). Therefore, cultural services do not respond to a direct need, but indirectly contribute to society in a way that may impact need for other resources. I have shown in this chapter that the way in which museums are advocated for and envisioned in public policy means that they sit in the categories of investment and prevention strategies. For example, investing in museums may make a locale more attractive to businesses, therefore encouraging economic development. Alternatively, aiming museum programmes at vulnerable groups may increase their confidence and well-being, reducing the chance that they will become more disadvantaged and rely more heavily on social services. The combination of focus on efficiency savings and retrenchment alongside lack of investment and prevention strategies is ominous for the LA funding of LAMs.

### ***4.3.2 Organisational Behaviour and Change in Local Authority Museums***

In reviewing the history of LAMs I saw change in the political environment and in funding but also a certain level of passivity from the sector as change was apparently slow. Change is often resisted by stakeholders, particularly employees. It feels threatening and insecure and can be seen as a threat to existing power relations, expertise and resource allocation. Even if the present situation is not satisfactory, change is an unknown and therefore can be viewed with suspicion (Pettinger, 2010: 37–38; Rollinson, 2008: 638). While forced rapid change in the sector is predicted by Manning, there are a barriers and challenges that I will discuss presently (Manning, 2013: 5, 20).

#### ***Control and Decision Making and Agility***

At the most basic level, an organisation can be modelled as the transformation of inputs by processes into outputs that are valued by stakeholders (Rollinson, 2008: 18). The processes and outputs are guided by organisational goals that are in turn guided by the resources available, the demands of the external environment and the

requirements of stakeholders (Hatch, 1997: 103; Pettinger, 2010: 16; Rollinson, 2008: 474–478). Stakeholders put pressure on the organisation to meet their requirements, both explicitly and implicitly. Different aspects of museums are subject to different stakeholders, from major funding decisions coming from national and local government to technical decisions about conservation techniques from practitioners (Gray, 2011: 52). While this is true for most of the public sector, Gray notes that the unique quality of museums is a temporal form of accountability: museums are responsible towards the past, the present, and the future (bequest value) (Gray, 2011: 54). In this chapter I have demonstrated that neither setting nor measuring goals for museums is straight forward. While public funding is based on the perceived value of museums, and therefore should encourage this mission, the debate over appropriate valuation means that it is not possible to specify a simple set of responsibilities and activities. This complexity leads to conflict between stakeholders and difficulty with decision making (Hatton, 2012: 139; Weinberg and Leeman, 2013: 20–21).

Publicly funded museum activities are directed by public policy, but its influence varies depending on the form of governance (Frey and Steiner, 2012: 224). National museums, for example, are managed at arms-length from the government by a board of trustees and have a degree of budgetary autonomy (e.g. may use income they generate themselves). In the UK, arms-length bodies such as ACE are supposed to ‘insulate arts from the whims of individual politicians’ and therefore enable the support of the broad range of cultural activities (Heilbrun and Gray, 2001: 272). However, I demonstrated in Chapter Two that the arms-length bodies with responsibility for museums have been influenced by political priorities. Further, unlike national museums LAMs are integrated into their LA, limiting their independence. They are subject to changing political priorities and Bradburne argues that this means they will always be structurally weak due to lacking a singular, coherent strategy (Bradburne, 2010: 151; Koster, 2013: 209). A concern is that public funding will decline but they will still be subject to the same level of public control, limiting their ability to change and cope with the decrease (Anderson, 2013: 195).

Burnard and Bhamra argue that the ability to adapt to new levels and types of risk is essential in organisational resilience, while a ‘rigid’ response is limiting (Burnard and Bhamra, 2011: 5583–5588). Due to the hierarchical structure of local government, individual managers have limited autonomy for decision making and LA processes and standards for accountability must be followed (Thompson, 2003: 230). This makes the organisations less responsive when change is required to address challenges in the external environment (van der Voet, 2014: 376; Weinberg and Lewis, 2009: 262).



Gardner argues that change in the public sector is usually gradual due to these restrictive characteristics, but there are instances of major change: when there are external pressures, friction builds up until major change is inevitable (Gardner, 2017: 152). As such, the longer that innovative change to address austerity is stifled, the more likely it is that it will occur.

Other forms of governance may be preferable in dealing with external pressures. Koster favours independent museums as they have greater control over their mission and strategy and can get government funding on their own terms in the form of grants (Koster, 2013: 209). Rizzo and Throsby argue that, while direct government subsidy controls the size and form of the museum through policy, indirect subsidy through policies such as tax relief for non-profits enables decisions to be privately made (Throsby and Rizzo, 2006: 999).

However, change in museums is further compounded by professionalisation and standards, creating a sectoral culture that resists change. Organisations, and communities of organisations, are bound by values, norms, rules and assumptions that cause them to resemble each other and resist change (Hatton, 2012: 142; Stanziola and Méndez-Carbajo, 2011: 245). Public funding in England has been based on the delivery of performance measures, therefore encouraging standardisation of practice in museums (Thompson, 2003: 236–237). Initiatives such as accreditation, therefore, while having improved standards in the sector, may have also inhibited the ability of individual museums to change.

A 2007 (pre-austerity) report on alternative financial models for arts and cultural organisations noted a trend towards increased spending on programming and reduced spending on overheads (Bolton and Carrington, 2007: 5). They argue that this risks organisations without the leadership or systems to operate effectively (Bolton and Carrington, 2007: 5). An ACE report from 2010 argued that organisational capacity for adaptation was a key characteristic of resilient organisations (Robinson, 2010: 27). However, this is an expensive characteristic to maintain, coming at the cost of efficiency (Teece et al., 2016: 13). For example, maintaining ‘slack’ in the form of excess staff or resources enables an organisation to respond to changing demand (Teece et al., 2016: 24). This poses a particular challenge for LAMs operating in austerity, then, as LAs are expected to increase their efficiency. This was acknowledged in the BOP Consulting report for English Heritage and the HLF: that efficient organisations often do not have the capacity to respond to new challenges (BOP Consulting, 2012: 8).

### *Income Diversification*

As LA funding to museums declines due to austerity, LAMs are recommended to find income from other sources (Babbidge, 2006: 3; Stanziola, 2011: 115). For LAMs, income raised from other sources may be returned to the LA's central funds, meaning that they do not benefit from the effort taken to raise it and therefore do not have an incentive to do so (Camarero et al., 2011: 255). In addition, studies have shown that an increase in commercial revenue leads to a decrease in public subsidy, perhaps due to the funder assuming that the organisation can make up the difference themselves (Camarero et al., 2011: 255; Frey and Meier, 2006a: 405; Frey and Steiner, 2012: 227; Selwood, 2002: 15). A study in the USA found that public subsidy is desirable for museums, with a mind-set within the sector that once a museum has achieved government funding for their operations they are secure (Rosenstein, 2010: 457). As such, activity that may lead to a reduction of public funding is likely to be avoided, making direct government subsidy a disincentive to a museum increasing its revenue (Stanziola and Méndez-Carbajo, 2011: 245).

Some commentators argue that the climate in which publicly funded cultural organisations, such as LAMs, operate has always been fairly benign and stable, meaning that they have lacked incentive to diversify their funding streams (Andreoni and Payne, 2003: 793; Babbidge, 2006: 3; Bakhshi and Throsby, 2010: 10; Méndez-Carbajo and Stanziola, 2008: 168; Stanziola, 2011: 119). Surveys found that museum managers feel that they deserve public money and that museums will always be rescued if they have financial difficulties (Babbidge, 2002: 1; Stanziola, 2011: 114). Certainly, while LAMs have closed due to financial difficulties and complaints about funding have continued throughout their history, the sector has survived overall. However, in the current economic climate, Pratley argues that arts organisations are now aware that there is no public safety net if they get into financial difficulties (Pratley, 2015: 67).

A concern with regard to income diversification is that there is conflict between the requirements of the different sources. For example, the receipt of charitable donations is dependent on the perceived worthiness of an organisation. High prices are thought to sully this perception, making the museum less desirable to donors (Frey and Steiner, 2012: 225; Heilbrun and Gray, 2001: 103; Johnson and Thomas, 1998: 79). A museum that depends on private donations is therefore likely to emphasise its social value by avoiding profits and charging 'social' prices in order to appear to be a worthy cause for donors (Frey, 1994: 332; Frey and Meier, 2006b: 1031). A museum seeking diverse

income sources, including both private donations and income generated from fees and charges will have to consider the balance between a social price and a profitable price.

LeRoux finds that non-profit organisations that rely on corporate sponsorship are more likely to have instrumental aims, whereas those reliant on Trust grants are less likely to (2009: 177–178). Again, seeking income from both sources may result in conflict between the demands of different stakeholders. In a case study of a failed museum, Burton identified conflict between corporate sponsors, who wished to show their industry in the best light possible, and museum staff who felt that they should present a more nuanced and multifaceted picture (Burton, 2007: 114). Corporate sponsorship, then, may result in conflict with museum professionals as well as other funders. Stylianou-Lambert et al. note the need for compromise and balance when considering the management of cultural institutions due to conflict between ideals and needs. They urge that all parameters are considered (Stylianou-Lambert et al., 2014: 571).

There is limited literature to help us build an expectation of the impact of changes in museum funding. For example, some empirical research suggests that government expenditure encourages risk taking and innovation, but other studies find that public museums invest less in innovation (Camarero et al., 2011: 249; Stanziola and Méndez-Carbajo, 2011: 252; Vicente et al., 2012: 669).

Frey and Meier claim that public museums are able to design activities to appeal to niche demographics (Frey and Meier, 2006b: 1030–1031), and other academics suggest that public museums have little incentive to consider public preferences because they do not have to generate income from visitors and because of the dominance in the 'expert' in informing decision making (Camarero et al., 2011: 255; Towse, 2002: 13). They may underprovide commercial enterprises such as gift shops and cafes due the argument that they detract from the intrinsic benefits even though they can help attract visitors (Frey, 1994: 332; Towse, 2002: 13). This conflicts with the findings from Chapter Two about the dominance of quantitative performance measures, as this suggests that public museums have to attract as many visitors as possible and therefore have to appeal to a wide audience and consider public preferences.

In this regard, existing literature about the organisational behaviour of museums is lacking, tending to distinguish between publicly funded museums, charitable museums, and commercial enterprises, when few museums operate solely in one of these categories. They tend to be 'multi-product' firms and 'hybrid' organisations: they have public and philanthropic aspects, offer intangible products and have intrinsic value, but

they also have commercial aspects, offering facilities and services for which a fee can be charged (Hatton, 2012: 138–139; Rosenstein, 2010: 451).

Nonetheless, if the balance of funding swings towards private sources, LAMs will need to be more competitive in order to secure income. Museums compete with each other and with the wider leisure industry, which has grown over time and in some areas offers recreational activities that reflect popular culture (Camarero et al., 2011: 248; Frey and Meier, 2006a: 404, 411, 2006b: 1029; van der Ploeg, 2006: 1196). As a result, museums looking to compete in a market must focus more on visitor needs, services and products (Vicente et al., 2012: 650). The amenities available to visitors have been recognised as a determinant of demand (Camarero et al., 2011: 248–249; Frey and Meier, 2006a: 402). In theory, a museum incentivised to generate its own income is concerned with attracting as high a number of visitors as possible, which means that they will design their exhibits as ‘blockbusters’ to appeal to a larger crowd (Frey and Meier, 2006b: 1030–1031). Focus on increasing visitor numbers is thought to favour popular culture and entertainment at the expense of ‘good’ culture and educational value (Archibald, 2006: 269; Tufts and Milne, 1999: 621).

With a greater emphasis on earned income and philanthropy, one can expect a greater proportion of arts activity to be ‘pop-up’ - seasonal or one-off, and dependant on opportunity (Crooke, 2007: 8–9). This is a significant risk to organisations like museums that have high fixed costs. Holden maintains that public funding is required for the ‘bedrock’ of cultural provision - keeping buildings open, and in the case of museums maintaining the collection – and these high fixed costs are not expected to be possible to cover with philanthropy (Holden, 2006: 24; Pratley, 2015: 67–68).

## 4.4 Discussion

Given the challenges of funding museums and the constraints of fiscal austerity, Bradburne argues that it is time to rationalise the sector:

Many cities were caught up in the museum building frenzy of the 1980s and 90s [...] In the lean years of the early 20<sup>th</sup> century, perhaps some of these museums can be consolidated, their collections joined with the consequence of greater rotation and greater perceived change. In the museum market, surely some museums should be allowed to swallow others, while still others become extinct? (Bradburne, 2010: 151)

Certainly, the current level of museum provision cannot be sustained without subsidy. The market fails to provide museums as they are an acquired taste and have public

good characteristics. Further, they have high fixed costs and may suffer from productivity lag, making it particularly difficult to cover costs from income. These characteristics mean that, beyond a small scale market appealing to a niche audience, museums require subsidy.

However, museums have intrinsic and instrumental values that public and private funders find desirable and therefore choose to fund to ensure that they are available to all. Nonetheless, even in times of plentiful public spending, there are limited public resources and multiple worthy public services with which museums compete for their share. As with all organisations, museums must work within the constraints of the wider environment and in order to successfully compete for funding they must deliver what funders want. Funders either want to give the public:

- What they want
- What they need but do not realise they need

Though the latter has remained part of museum advocacy (e.g. Jowell, 2005; McMaster, 2008), I found in Chapter Two that the trend in British politics has been towards the former with consultation and public accountability key themes over the past 30 years. Studies suggest that the public value the Arts intrinsically but expect instrumental outcomes from them in return for public funding.

The question, then, is whether a museum undermines its integrity by utilising instrumental value to win funding. As organisations, museums may have no choice as to be successful they must manage the economic and political environment in which they operate (Falk and Dierking, 2008: 234). While public funding is required for core museum functions that may be unconsciously valued (intrinsic value), public policy discourse does not focus on this valuation due to the need to show something tangible in return for investment. Presenting an image of creating instrumental benefits is pragmatic and being funded for instrumental reasons is one way of ensuring that intrinsic benefits, such as collections remain funded. Studies of instrumental value are often tokenistic, suggesting that instrumental valuation may not be changing what museums do, but rather encouraging the presentation of data in a way that suits advocacy. Further, I have shown in this chapter that the value of museums can be conceived in multiple ways with no clear right or wrong answer.

Nonetheless, I argue that the economics of museums in combination with the development of public policy in the UK leaves museums in a position that they cannot wholly achieve any of their many values. The apparent necessity of public funding to cover the high fixed costs of museums mean that museums cannot avoid the impact of

public policy. They must position themselves as part of the amorphous 'bigger picture' of policy making, where expectations are added and subtracted through vague (non-statutory) policy initiatives as trends evolve. With governments changing frequently, museums find themselves in a constant state of flux, but as they are not legislatively defined, government expectations are vague and indirect (Davies, 2008: 259):

After decades of debate, museums in the Western world remain confused over their proper role(s) with the result that museum managers operate in the midst of poorly articulated expectations. (Davies et al., 2013: 345).

In addition, museums are not solely dependent on governments. This is in part due to political pressure and in part due to divergence between social needs, as identified by society and as identified by government (Creaco, 2002: 89). As hybrid, multi-product organisations museums are subject to many stakeholders with differing expectations, meaning that the management of a museum is ultimately not guided by principles of intrinsic value creation but a juggling act of appeasement to all who have a stake in keeping the museum funded. Even the influence of one stakeholder group can be contradictory: the government has both told the sector to increase earned income, which makes it available only to those who can pay, and given it a social mission with an emphasis on access for all (Munley, 2013: 45; Tufts and Milne, 1999: 614).

Mixed funding may theoretically result in a balanced museum: with public funding enabling the 'public good' characteristics to be maintained and private funding enabling visitor focus. Hypothetically, the activities required to secure funding from donors requires museums to adopt a social welfare image, but earning income through the sale of goods and services requires business-like organisational structures and management approaches (Camarero et al., 2011: 253; Frey and Steiner, 2012: 225; Heilbrun and Gray, 2001: 103; Johnson and Thomas, 1998: 79).

Organisational change is particularly difficult for LAMs. As part of local government they are bound by bureaucracy that makes decision making slow and avoid risks. As part of the wider museums sector they are bound by professional standards and norms that hinder change. Austerity demands that LAMs seek efficiency and therefore precludes the maintenance of the slack associated with agile organisations able to respond to challenges in their environment.

Beyond rigorous debate on value, I have found that existing academic literature does not adequately explain the complexity of museums. This thesis provides an opportunity to explore these themes. The unfolding situation might force unprecedented change

and I will explore whether LAMs resist or exploit it. Further, I will explore how this effects the perception, expression and utilisation of value.

## 5 Methodology and Methods

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### 5.1 Overview

This project studies the impacts of the current government policy of austerity on LAMs in England. I undertook a comprehensive and systematic survey of the impact of austerity on LAMs in order to understand the nature and scale of the situation, and to evaluate different strategies for responding to it.

This study is important due to the changing landscape of LAM funding that is a consequence of the recent recession and government policy of austerity. While some work has been done on quantifying the impact of austerity on the cultural sector via survey (e.g. Arts Development UK, 2011; Evans, 2012, 2013; Newman and Tourle, 2011), to date no studies have looked in depth at management strategies and their implementation in LAMs. By analysing the impact of fiscal austerity on LAMs and evaluating their responses to it, I aim to learn from the current situation and provide strategies for future resilience. In addition, a review of the literature presented in Chapter Four suggests that the impact of different funding sources and stakeholders on museums has not been adequately explored. The current situation, then, gives us the potential to critically evaluate the theories of museum economics and museum behaviour in practice.

#### 5.1.1 Research Questions

As described in Chapter One, the research questions for my project are:

4. How has government austerity affected local authority museums in England? How does it continue to affect them?
5. How have these museums reacted, or plan on reacting, to these effects? What strategies have they adopted?
6. How effective have these strategies proved to be so far?

### 5.2 Theoretical Approach

Positivist and post-positivist approaches to research assert that empirical observation and measurement can find social facts that predict behaviour; that there is an objective and observable social reality (Creswell and Plano Clark, 2011: 40; May, 2011: 9; Punch, 2005: 47; Tracy, 2013: 39). This approach works towards theory verification with the belief that the social world can be analysed independently of individuals'



interpretations of it, meaning that the researcher should be objective and detached from the topic under investigation. This approach focuses on quantitative methods and analysis to provide measurable facts and generalisations (Blaxter et al., 2010: 61; Creswell and Plano Clark, 2011: 40; May, 2011: 10–11; Punch, 2005: 235; Wilmot, 2005: 1).

The constructivist viewpoint, on the other hand, is that social reality is constructed and contextually situated by individuals based on their knowledge and experience (Blaxter et al., 2010: 61; Creswell and Plano Clark, 2011: 40). This approach works towards theory generation, promotes the importance of context and allows flexibility and exploration, using qualitative research methods that enable the perspective of the participants to come to the fore (Barr, 2004: 166–168; Braun and Clarke, 2013: 4; Bryman, 1989: 124; Punch, 2005: 238).

These two opposing theoretical approaches to research, and therefore the types of data they collect, have been seen as incompatible due to their contrasting epistemological positions. However, Deacon and Punch assert that few researchers believe that quantitative methods are free of researcher bias anymore, meaning that there are few 'pure' positivists (Deacon, 2008: 94; Punch, 2005: 55). Further, quantitative researchers tend to try and ascribe meaning to their findings in a constructivist way (May, 2011: 132). Equally, qualitative researchers find it difficult to ignore the urge to make generalisations from their findings (Gray, 2013: 192). Quasi-quantitative terms are extremely difficult to avoid: using descriptors such as 'many', 'frequently', 'the majority', or 'fewer' assigns quantity to qualitative results even if the use of numbers is avoided (Bryman, 2006a: 148; Deacon, 2008: 95). Deacon argues that when qualitative researchers use the quasi-quantitative terms described above, it would simplify the analysis to use numbers (Deacon, 2008: 99).

Taking the middle ground, critical realism believes that there is an ultimate truth, but that we are not able to see the full picture, and that the actions of individuals are constrained by structure and process. It acknowledges that the researcher is biased by their individual worldview, but believes that there is an objective truth that should be striven for through aiming for comprehensiveness in research methods (Braun and Clarke, 2013: 27; Robson, 2002: 32–34; Saunders et al., 2009: 119).

Pragmatism, on the other hand, states that there are no absolute truths as actions are rooted in situations, leaving social reality subjective and multiple (Ruwhiu and Cone, 2010: 108, 112; Saunders et al., 2009: 119). Pragmatism was appropriate for this study

as it is real-world practice oriented and approaches research as problem-solving (Creswell and Plano Clark, 2011: 40).

### **5.2.1 Pragmatism and Mixed Methods Research**

Pragmatism is commonly associated with mixed methods research (Creswell and Plano Clark, 2011: 41). There are many practical reasons for using a pragmatist methodology and undertaking mixed methods research. One is to increase the validity of the results by comparing different types of data to see if they match. This is usually termed triangulation (Blaxter et al., 2010: 206; Bryman, 2006b: 102; Creswell and Plano Clark, 2011: 62; Tracy, 2013: 40). If one accepts that there are strengths and weaknesses to all methods, as in the pragmatist approach to research, mixed methods are thought to capitalise on the strengths while offsetting the weaknesses, increasing the likelihood that weaknesses will be exposed (Creswell and Plano Clark, 2011: 62; Fielding, 2008: 39).

As stated above, qualitative research usually generates theory, whereas quantitative research tests it. If mixed methods are used in sequence then a qualitative study could generate a theory to be tested in a later quantitative phase, making it useful when there is limited prior understanding of the topic (Barr, 2004: 16; Blaxter et al., 2010: 206; Bryman, 2006a: 155; Creswell and Plano Clark, 2011: 63; Punch, 2005: 242).

Qualitative work could inform the development of quantitative instruments, such as revealing the most appropriate wording for a survey so that it is as effective as possible (Bryman, 2006a: 155, 2006b: 102; Creswell and Plano Clark, 2011: 62; Gray, 2013: 100).

On the other hand, qualitative work could be used to explain the findings of quantitative work (Creswell and Plano Clark, 2011: 62; Crompton and Jones, 2013: 72; Fielding, 2008: 40). The time consuming nature of some qualitative methods, such as ethnography, mean that quantitative work can be used to build a general picture and pick out patterns of social life in order to focus the qualitative work so that it can fit into the resources available (Bryman, 2006a: 158, 163).

There are a number of reasons why mixed methods are appropriate for my study specifically. Firstly, my research works on a practical problem: though the current economic crisis is causing an unprecedented level of hardship in the LAM sector, funding has never been plentiful and there have been regular funding squeezes. As such, in studying the current situation to understand the impact and evaluate responses, the findings have a clear application in aiding LAMs with management strategy to enable future resilience. Mixed methods research increases the utility of

results in the real world and therefore is suitable for research with an applied focus (Bryman, 2006b: 103; Creswell and Plano Clark, 2011: 63). One reason for this is that while qualitative research provides contextual understanding, quantitative research produces results that can be generalised (Creswell and Plano Clark, 2011: 62). Deacon claims that quantitative methods more successfully engage academic research with public policy (Deacon, 2008: 100). Similarly to the discussion in Chapter Four about instrumental arguments and public policy, this may be because quantitative figures appear scientific rather than anecdotal and enable comparison with other areas.

Using mixed methods can make the results more comprehensive as, while quantitative research provides information on structure, qualitative research helps to make sense of process resulting in greater 'analytic density' (Blaxter et al., 2010: 206; Bryman, 2006b: 104; Cassell and Symon, 2004: 324; Creswell and Plano Clark, 2011: 62; Fielding, 2008: 40; Gray, 2013: 191). Considering the concept of impact from my research question then it is easy to conceptualise it on many levels. I can look at the structural elements of impact, such as changes in funding and activities and causal relationships between these. However, I must also acknowledge that it was individuals who made the decisions about the changes through social interaction: reasoning, context, perspective and opinion are relevant, which qualitative research will help illuminate (Barr, 2004: 165–166; Schwab, 2005: 4, 91; St John, 2004: 199).

St John argues that due to the complexity of organisations, researchers must consider different units of analysis as they are interdependent: individuals within groups, groups with organisations and organisations within industries (St John, 2004: 198–200). In Section 4.3, for example, I explored how the professionalization of a sector can inhibit change in individual organisations. As such, undertaking research at different levels can show how they differ and interact.

While different sources can be triangulated to confirm an interpretation, mixed data sources can also be used to see how different perspectives vary. For example, in organisational studies, documentary evidence can be used alongside interview data to see whether official policy matches practice (Bryman, 1989: 124; Creswell and Plano Clark, 2011: 63).

Finally, in approaching this study, it is clear that sampling is important. There are around 350 local authorities and there is no existing information about the museums associated with each one. A qualitative data-rich study cannot cope with 350 cases and therefore a sample is important in making the study manageable (Mason, 2002: 126). However, Hitt et al. report a study in which they repeated an organisational research

project using three different sampling strategies and found that all three produced different results (Hitt et al., 2004: 12). This shows the importance of careful consideration of sampling strategy: even if non-probabilistic sampling is used (purposive sampling, for example), preliminary work must be undertaken to construct the criteria. Mixed methods research beginning with a quantitative phase can enable construction of a sampling strategy for the qualitative work (Bryman, 2006a: 157–158, 2006b: 103; Creswell and Plano Clark, 2011: 62, 83, 86).

There are different models of mixed methods research. Methods may be used sequentially or in parallel. I use a sequential model starting with quantitative research and finishing with a qualitative phase. The reasons for this are largely explained in the discussion above, but the two main points are:

- The quantitative phase is used to define the situation and then the qualitative phase is used to explain it.
- The quantitative phase is used to define the sampling strategy for the qualitative phase.

A sequential model can help to address some of the criticisms of mixed methods. A common criticism is that the theoretical assumptions behind the methodology are lost in mixed methods due to the pragmatist viewpoint that all approaches are valid (Bryman, 2006b: 107–108). The pragmatist researcher has been criticised for using research methods too informally and Bryman found that mixed-methods research is not always well thought through, with rationale and use not aligned (Bryman, 2006b: 107–108; Tashakkori and Teddlie, 1998: 6). However, sequential mixed methods allow for rationalisation and explanation of the assumptions at each phase, helping to ensure that the methods are well thought through (Tashakkori and Teddlie, 1998: 6, 46).

## **5.3 Methods**

### **5.3.1 Overview**

In a systematic study of LAMs in England, I collected data in three phases, starting with a broad sample and quantitative methods and ending with highly detailed case studies. Each phase informed the next in order to produce a comprehensive but manageable and data-rich study. As described previously, the aim of following these methods is to generate results that had a practical application, with the situation having been both defined and explained. In this section I briefly introduce the methods used in this study before covering individual methods in detail.

### *Phase One - National Overview*

This phase has two purposes:

1. To provide quantitative analysis that began to answer my first research question 'How has government austerity affected local authority museums in England? How does it continue to affect them?'
2. To obtain information on relevant variables to construct a sampling framework for more detailed work.

As such, in this phase I collated existing quantitative data about LAs, LAMs and the changes they underwent due to austerity. I sought data that was consistent for all LAs in England in order to define the population and create an overview of the structural features of the impact of austerity. I statistically analysed the data using SPSS with the two purposes stated above in mind.

### *Phase Two - Organisational Documentation*

In this phase, I increased the depth of my study by performing qualitative analysis on organisational documentation. I conducted a survey and thematic analysis of organisational documentation about LAMs from a sample of LAs. This phase contributed to answering all of my research questions:

1. For question one, which looks at the effects of austerity on LAMs, this phase furthered the analysis undertaken in Phase One by providing greater depth about structural impacts in specific cases, and began to provide qualitative detail.
2. For question two, which looks at the museum reactions, this phase began to describe the strategies that were used, the decisions that were made, and the stated rationale for these.
3. For question three, which looks to evaluate the strategies used, this phase enabled analysis of the changes in museum function that occurred. These were related to theory about museum function and value from my literature review in order to assess efficacy in these areas.

### *Phase Three - Interviews*

I conducted semi-structured interviews with staff from the sampled LAMs. This phase contributed to all three research questions:

1. For question one, which looks at the effects of austerity on LAMs, this phase furthered the depth of the data collected by adding a human dimension and differing viewpoints, moving beyond the structural impacts.
2. For question two, which looks at the museums' reactions, this phase furthered the work undertaken in Phase Two by exploring perspectives on the reasons behind strategy and decision making.
3. For question three, which looks to evaluate the strategies used, this phase enabled analysis to be undertaken exploring museum workers' perspectives on efficacy. This acknowledged that ideas about museum function and value are subjective and theoretical and therefore multiple perspectives are valid.

### **5.3.2 Phase One - National Overview**

#### *Rationale*

As described above, qualitative methods are often time consuming and therefore are impractical to use in a large number of cases (Bryman, 2006a: 158, 163; Mason, 2002: 126). Any sample should be selected carefully as it will affect the results of the study (Hitt et al., 2004: 12). Due to the time and resources available, I chose to take a sample and to undertake quantitative work to build an overview and structure for a subsequent qualitative phase.

#### *Method*

I identified a population of 456 LAMs in January 2008 using the Museum Association's (MA) online 'Find a Museum' database, cross-referenced to the website of each museum, the website of each LA, MA online news and the MAs 'Museums and Galleries Yearbook' (Museums Association, 2007). January 2008 was chosen due to being at the beginning of the financial crisis before austerity measures were implemented. I then identified the governance and management arrangements of each LAM, and changes in these since 2008, using the same sources as above. Other museum characteristics, such as collection type and visitor numbers, were excluded at this time due to their heterogeneous nature. This was undertaken in March 2015.

I made no attempt to define what constitutes a museum and therefore all entries in the MAs database that were not excluded by the below criteria were included. This study defines a LAM as one that was both managed and governed by a LA in 2008, whether alone or in collaboration with another organisation. As such the following were excluded:

- LA Museum Services that provide guidance or support services to independent museums but do not manage museums directly;
- Museums where a LA has a role in governance but where management is undertaken by another body, such as a museum Trust where a LA is a trustee;
- Museums that receive funding from LAs but are not managed or governed by them;
- Stores and archives, whether they are governed and managed by LAs or not.

I used data from the Office for National Statistics (ONS) and gov.uk publications portal to gather data on the characteristics of LAs, including:

- The regional distribution and differing classes of LAs (Office for National Statistics, 2014a). The structure of LAs has changed over time leaving LAMs managed by different types of LA with different responsibilities and geographic reach (Chapter Two). The differing remit of each type of LA may impact the LAMs.
- Official figures on LA income and expenditure (Local Government Financial Statistics (LGFS)). This data was broken down by service type and included LA expenditure on Culture and Related Services (LGFS Cultural, Environmental, Regulatory and Planning Services (RO5)), which was further broken down to provide specific figures for Museums and Galleries and Heritage Services. This enabled analysis of where spending cuts have been made. Both figures for Museums and Galleries and Heritage Services were included as I found they were used interchangeably by LAs: for example Bath and North East Somerset Council reports expenditure under Heritage Services but none under Museums and Galleries despite running the Victoria Art Gallery.
- LA spending power (Department for Communities and Local Government, 2013b, 2014b). This allowed analysis of the financial status of the LA compared to cuts.
- Unemployment data (Office for National Statistics, 2014b). In Section 3.3, I found that LAs with more deprivation were expected to suffer more from central funding cuts. Having greater unemployment means that they have more residents requiring services and more with council tax exemption, meaning that they spend more and generate less revenue (Crawford and

Phillips, 2012: 124). Hypothetically, LAs with higher unemployment will need to make greater cuts to discretionary services like museums.

- Election results, for the political affiliation of each LA (Ball, 2013; BBC, 2008, 2009; City of London, 2014; Council of the Isles of Scilly, 2013a, 2013b; Mid Sussex District Council, 2014; Northampton Borough Council, 2014; The Guardian, 2010, 2011, 2012, 2014). As there had been widespread LA elections in 2011, I chose this date to represent political leadership at the point at which austerity measures were emerging and strategies being made. In considering the history of LAMs I saw the influence of different governments on LAs. I therefore wanted to look at the influence of the different political ideologies on LAMs.

I adjusted the collected financial data for inflation to the 2013-2014 level so that it could be compared (Appendix One). I calculated change in expenditure between the earliest and latest figures found, 2008-2009 and 2013-2014, and calculated this as a ratio to account for the varying sizes of LAs.

Financial data can be difficult to analyse. When preparing accounts, there are a number of judgements to be made about how to report income, assets and expenditure and the choices made can vary the ultimate figures reported quite considerably while maintaining compliance with accounting regulations (Fridson and Alvarez, 2002: 34; Rice, 2008: 197–198; Schilit, 2002: 30). As such, in analysing financial statements from different organisations or over different years, the researcher must make assumptions about the comparability of the data. For example, one must assume that all LAs categorise their expenditure in the same way.

I encountered a number of specific issues with this financial data. Firstly, some LAs had no expenditure on museums and heritage services in 2008-2009 but some in 2013-2014, which produces a ratio of infinity. There are three main options for dealing with this when undertaking statistical analysis:

- Excluding these LAs. This allows statistical tests to be undertaken with the remaining data but these are real data points and therefore excluding them may change the results.
- Treating the data as categorical by dividing it into logical categories, such as those that increased spending, those that decreased spending and those that maintained spending. This enables some statistical tests to be undertaken but means that detail is lost due to individual data points not being used.



- Adjusting the data by adding a figure of £1 expenditure in 2008-2009 so that a usable ratio is calculated. This produces a very large ratio, in place of infinity, and allows the data points to be used in statistical analysis, but again it may have an impact on the results.

Secondly, in some cases negative expenditure was reported, which causes further problems when calculating a ratio to represent change. For example, Runnymede Borough Council reports -£2,320.00 of capital expenditure in 2008-2008 and £5,000.00 in 2013-2014. This produces a ratio of -2.16, which appears to show that expenditure has decreased when in fact it appears to have increased. This issue is difficult to get around when using a ratio to quantify change in expenditure. However, a further issue is that expenditure on museums and heritage services varies greatly; revenue expenditure ranges from £0 to £16m. These figures are difficult to compare, as illustrated by the following hypothetical examples:

- Two museums services have lost £10k in funding between 2008-2009 and 2013-2014. The first started with funding of £1m and the other started with funding of £20k. One can argue that the £10k loss is more important to the second service as it represents 50% of their expenditure. As such, actual change may not be an appropriate measure for analysis.
- Two LAs have increased their expenditure on museums by 200%, however, the first started with expenditure of just £1k and the other with expenditure of £1m. One can argue that an increase from £1k to £2k is less important to LAMs than an increase from £1m to £2m. As such, percentage change is may not be an appropriate measure for analysis either.

There is no ideal solution to these issues, which limits the possibilities of statistical analysis. Ultimately, one can:

- Group LAs by expenditure and analyse them separately, so that one is comparing those with similar levels of expenditure in 2008-2009. This lessens the issue of comparability described above;
- Simply report whether expenditure has increased, decreased or stayed the same, and use this in analysis rather than the actual figures. This reduces the level of detail used but avoids the issues with the data.

In the analysis, then, I kept the limitations in mind. I explored different ways of treating the data and presented results only where tests on a particular variable consistently produced a similar result, giving weight to its validity. Nonetheless, the results must be treated as tentative and exploratory rather than conclusive. Further, where multiple

statistical tests are undertaken, the chance of finding a result at the significant level increases. As standard, a p-value of less than 0.05 is considered to be a statistical significant result<sup>3</sup>, but when undertaking multiple tests it is considered good practice to look for a p-value of less than 0.01 instead. The analysis plan is shown in Appendix One and the results are presented in Chapter Six.

### **5.3.3 Phase Two - Organisational Documentation**

#### *Rationale*

Organisational documentation provides excellent background material to enable a researcher to familiarise themselves with an organisation before fieldwork (Forster, 1994: 148). As such, analysis of organisational documentation in my project was a valuable exercise as it helped me improve my interview questions for Phase Three and ensured that I was able to understand the context of the information relayed to me (Forster, 1994: 148).

In addition, organisational documentation allowed balance between breadth and depth: while the quantitative data in Phase One enabled my study to cover all LAs, it was very top-level, and the interviews in Phase Three were in-depth but narrow in coverage (Brinkmann, 2013: 59). Organisational documentation provided the middle ground. Further, organisational research has been criticised for being opportunistic: it is often difficult to negotiate access to the organisations that you want meaning that samples cannot be considered representative and results lack external validation (Bryman, 2013: 17–18). In the case of my research, LAs are required to make much of their documentation public, whether freely accessible online or through a Freedom of Information request. As such, organisational documentation provides a way to make my findings more representative and valid: though for the interview phase I was constrained by access, I was able to sample according to my research goals for this phase.

Different documents have different purposes and circulations, both internal and external (Atkinson and Coffey, 2011: 78; Forster, 1994: 148). Prior describes documents as integrated into 'fields of action' including creators, users and settings (Prior, 2008: 2). They are social objects because they are written, distributed, and shared in socially organised ways (Atkinson and Coffey, 2011: 79; Silverman, 2005:

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<sup>3</sup> When testing whether a variable has had an impact on an outcome, a p-value of less than 0.05 means that the result shown is expected to occur less than 5% of the time if the variable has no effect on the outcome, therefore it is considered likely that the variable did have an effect on the outcome.

160). It must be recognised that documentation portrays only an image of the organisation, and can be fragmentary (not everything is recorded and not everything recorded is accessible) and political (Forster, 1994: 148–150). For example, documents describing action can follow standardised formats that portray the action as if it was fully intentional, providing justifications and explanations and using 'buzzwords' to present the organisation in a way that might be expected. In this way, documentation does not simply describe events, but creates and performs them. Further, the reader will interpret documents according to their assumptions and knowledge (Atkinson and Coffey, 2011: 83-86). One criticism of using documentation for research is that it decontextualises events, meaning that the researcher must look at how they fit into wider systems (Atkinson and Coffey, 2011: 88). My goal, then, was not to use documentary research as if it depicted the reality of day to day organisational operations truthfully and transparently, but to consider how social reality was reflected. I considered how, why and in what setting documents were produced and how they were received and used by their audience, rather than simply looking at content (Atkinson and Coffey, 2011: 81; Prior, 2008: 3–4, 2011: 96–99; Silverman, 2005: 160). Further, I used documentary research alongside financial and interview data so that I could consider context and identify gaps.

This is connected to a final reason for using organisational documentation in my project. Documentation is considered unobtrusive as it is not produced with the researcher in mind (Bryman and Bell, 2007: 319; Neuman, 2006: 321–323; Saunders et al., 2009: 268). While this adds difficulty to analysis as the data is not constructed according to research needs (Saunders et al., 2009: 269), documentary analysis provides a different perspective to direct interaction with research participants where they were aware that they involved in research.

### *Method*

Using the results of Phase One, I took a sample of 20 LAs. The sampling procedure is discussed below. While this sample may be considered small for those used to quantitative work, for qualitative study smaller samples are necessary due to the amount of data collected (Mason, 2002: 126). This sample size, therefore, was a compromise to ensure that as much breadth as possible was maintained while keeping the amount of data manageable.

For each LA, during September and October 2015 I visited their official website and undertook two simple searches:

- Using the main search function, I searched the entire website using the term 'museum'.
- Using the search function for the committee documentation archive, I searched using the term 'museum'.

No date restrictions were added to the searches, but in most cases results did not go further back than 2006. In some cases, the search term 'museum' was not considered likely to return sufficient results. For example, for Bath and North East Somerset Council, the museums are part of the heritage service and are normally referred to in this way meaning that a search using only the term 'museum' would miss results for the Roman Baths and Pump Rooms. Secondly, Blackpool Borough Council currently has an Art Gallery, with a city museum in development. The gallery was included due to being present in the MA's database (see criteria for inclusion in section 5.3.2). In these cases, the additional equivalent search terms 'heritage service' and 'gallery' were used respectively. Finally, where other organisations were involved in the management or governance of the museums, their websites were searched in the same way.

The investigation found annual reports and accounts, committee papers and minutes, news items and press releases, consultancy reports, policy documents, and management plans. The analysis of the data is discussed in full in Section 5.3.5.

### *Sampling*

The first phase endeavoured to define the situation and therefore identify variables. Existing data was used that was consistently available for all LAs and therefore the entire population was studied. The second phase, however, included much greater depth and required sampling to be feasible with the available resources and practical for analysis. The discussion below describes how and why the sample was taken.

Sampling should be based on knowledge of the population but appropriate to the resources available (Blaxter et al., 2010: 170). Sampling strategy can either be probabilistic or non-probabilistic. With the former, all members of a population have a known probability of selection and therefore the sample is said to represent the population, enabling statistical analysis (Wilmot, 2005: 3). Non-probabilistic sampling does not produce a statistically representative sample but needs to link meaningfully to the wider population and so cases are chosen according to pre-determined criteria and logic (Mason, 2002: 120).

I previously discussed how even qualitative researchers are drawn to the idea of generalisation, suggesting that probabilistic sampling is always preferable, but there

are valid reasons for using a non-probabilistic approach. For example, when the total population is not known it is not possible to take a representative sample (Mason, 2002: 125; Robinson et al., 2013: 121). Random sampling is only appropriate when it is believed that the population is relatively homogenous in relation to the variables being investigated, and stratified sampling is used when the population can be divided into groups that are each considered to be relatively homogenous (Gray, 2013: 210).

Non-probabilistic sampling can enable researcher bias and therefore reflexivity is important in designing the selection criteria, and a robust sampling frame is critical (Gray, 2013: 217; Wilmot, 2005: 1). There are many types of non-probability sampling. Convenience sampling is the least credible method, being based solely on the resources that the researcher has available (Gray, 2013: 224). Wilmot argues that while resources have to be considered in designing research, they should not be allowed to undermine it (Wilmot, 2005: 2). As such, I avoided convenience sampling. Purposive sampling, on the other hand, involves selecting cases according to predetermined criteria with a focus on data-rich cases (Gray, 2013: 217). There are different types of purposive sampling. Random purposeful sampling can be used in advance of the knowledge generated by the study, when the population is data-rich but there is no clear reason for selecting one case over another (Gray, 2013: 220). While typical case sampling aims to select cases that are considered typical, extreme case or deviant sampling looks for unusual cases in order to explain the differences (Gray, 2013: 217–218). Intensity sampling focuses on particularly data-rich cases, but these usually have to be identified first and therefore two stages of sampling, data collection and analysis can be necessary (Gray, 2013: 218). In fact, two stage sampling could be necessary for all purposive methods as selecting typical or extreme cases also requires prior knowledge of the population. Maximum variation sampling looks for diverse cases and hopes to find commonalities between them (Gray, 2013: 218–219). Finally, special or unique case sampling is used when there is a critical reason for selecting a particular case. For example, a politically important case that could provide data that would influence practice (Gray, 2013: 220–221).

The outcome of Phase One showed that there is great variation in LAMs (see Chapter Six). While LA class (different types of LA with different responsibilities and geographic reach) was a dominant characteristic that appeared to account for some variation, the evidence was not strong enough for this to be a robust category for stratification. As such, probabilistic sampling did not appear appropriate as a sample of LAs cannot represent the entire population robustly. A non-probabilistic method was deemed more

suitable and I chose maximum variation sampling due to the diversity seen in the statistical analysis.

I used of the findings of Phase One to select characteristics of interest. A 10% sample from the 189 LAs with LAMs was taken, giving 19 LAs. Each characteristic was reviewed to identify the variation within it. For example, LA class appeared that it may influence museum provision whereas LA region did not. There were 5 LA classes and I aimed to include 10% of each, and therefore included 9 of the 85 Shire Districts. Cases were chosen with the name of the LAs obscured and therefore based solely on the characteristics. This method resulted in a wide variation of LAs being included. The LAs included did not cover all regions, but . The selection of the criteria of interest is discussed in the results of Phase One in Section 6.4, the criteria used are shown in Table 3 and the sample itself introduced in Chapter 7.

**Table 3: Characteristics Used in Sample**

Characteristic	Variations	Number in Population	Number in Sample
Class of LA	Shire District	82	8
	Metropolitan District	28	3
	London Borough	20	2
	Unitary Authority	44	4
	Shire County	15	2
Number of Museums	One	91	8
	Two	35	4
	Three or more	63	7
Collaboration for museum management/governance <sup>4</sup>	Without collaborators	147	16
	With collaborators	42	3

<sup>4</sup> In this study, collaboration for management or governance is defined as any other organisation with an official stake in the museum. A collaborator may be another LA with joint governance and funding arrangements, or a trust that owns the building or collections and has an arrangement for the LA to run it. A common collaborator is a trust for a military regiment that has an arrangement with the LA so that the collections of the regiment are displayed within a named gallery in a museum run by the LA.

Changes to museum management/governance between January 2008 and March 2015	Changes made	52	5
	Changes not made	137	14
Museum closures between January 2008 and March 2015	Museum(s) closed	17	2
	Museum(s) not closed	172	17
Museums transferred to Trust between January 2008 and March 2015	Museum(s) transferred to Trust	25	2
	Museum(s) not transferred to Trust	164	17

### **5.3.4 Phase Three - Case Studies**

#### *Rationale*

Interviews provide insight into understandings, opinions, attitudes and feelings, and they provide the opportunity to enrich analysis and explanation of findings (Arksey and Knight, 1999: 2–3, 28). In comparison to questionnaires, which are thought to be superficial, interviews can build an interpersonal relationship between interviewer and interviewee, enabling greater disclosure (Gillham, 2005: 4–5). Further, as described previously, interviews can be used alongside documentary evidence to see whether official policy matches practice (Bryman, 1989: 124; Creswell and Plano Clark, 2011: 63). In my study, interviews added depth and provided perspective on strategy and decision making for all three research questions.

Semi-structured interview allow flexibility for following perspectives that are considered important by the interviewee, though the skill of the interviewer is then critical in ensuring that the interview does not become unfocused (Brewerton and Millward, 2001: 162; Brinkmann, 2013: 21). This was appropriate for my project having collected more structured data in prior phases. Nonetheless, I needed to ensure that the data gathered was relevant, so a semi-structured method balanced this with the desired flexibility. Further, I endeavoured to interview staff at different levels of the museums' hierarchy in order to gain a variety of different perspectives.

Due to the potentially sensitive nature of the topics discussed in the interviews, it might have been considered ideal for both organisations and individual participants to have been presented anonymously (Tilley and Woodthorpe, 2011: 198). This may have encouraged participation and full disclosure, as well as protecting participants in their professional lives (Tilley and Woodthorpe, 2011: 199). However due to the use of a sample and organisational documentation in Phase Two, museums were easily identifiable and therefore anonymity was not viable. Further, there has been recent discussion about whether anonymity is always appropriate. Anonymization, for example, means that historical, cultural and social context is lost as details must be obscured, meaning that the finding must be interpreted abstractly (Taylor and Land, 2014: 104; Tilley and Woodthorpe, 2011: 200–201). Participants may want to be named in the research, particularly where it is a participatory or emancipatory study, so that they retain ownership over their contribution (Taylor and Land, 2014: 99; Tilley and Woodthorpe, 2011: 200). Finally, anonymization poses a particular problem when research has the potential for real-world impact through engagement with public debate, as is the case in my study (Taylor and Land, 2014: 98, 104; Tilley and Woodthorpe, 2011: 200). I hoped, for example, to identify examples of good practice that would be useful to other LAMs.

### *Method*

Access to organisations can be difficult and some should be expected to refuse. To facilitate access, I offered a report of my findings to the participating museums, as recommended by Bryman (Bryman, 2013: 15). Where participants can be identified consent is particularly important. Participants must be fully informed about how their input will be used, be allowed to withdraw or make amendments at any time, and be given the opportunity to review their transcripts and the final draft of the thesis (Tilley and Woodthorpe, 2011: 202–203). As such, I provided an information sheet and consent form which I discussed with the museum and with each interviewee before the recording of their interview began. I gave participants flexibility about how their input was used and how they were represented. As participants were speaking about their employer and the topic was potentially sensitive, I agreed that the transcript of each interview would not be published and only relevant quotes included. This was necessary to protect participants.

Individual interviews were appropriate in this case, again due to the potentially sensitive nature of the topic. Individual interviews enable confidentiality over group interviews (Brinkmann, 2013: 26–27). Interviews were conducted in a place of the



participants choosing, usually a private office in the museum. I developed an interview plan that consisted of introductory questions and then topics identified during the literature review and Phase Two as being of interest (Appendix Two). The topics of interest helped me maintain focus while enabling interviewees to cover topics of interest to them. The interview plan was piloted at the first LAM and then revised, as recommended by Brewerton and Milward (2001: 156). This ensured that the questions were appropriate before too much of the work was undertaken and provided opportunity for practice.

In order to recruit participants, I contacted all of the LAMs included in Phase Two by email to request interviews, acknowledging that not all would agree. If I did not receive a response to my initial enquiry I made contact a second time and looked for alternative contact details. I received 13 responses to these enquiries and ultimately 10 LAMs agreed involvement. I interviewed between one and three members of staff at each LA, resulting in 14 interviews. The interviews were completed between January and August 2016. The analysis of the data is discussed in Section 5.3.5.

### **5.3.5 Qualitative Analysis**

#### *Rationale*

I analysed two forms of textual data, organisational documentation and interview transcripts. In both cases, a common recommendation is for the researcher to familiarise themselves with the text and undertake coding to identify patterns and themes (Blaxter et al., 2010: 233; Crompton and Jones, 2013: 75; Forster, 1994: 150–151). This could involve either a content analysis or a thematic analysis approach.

Content analysis is a largely quantitative process; categories are established and instances of each category counted (Braun and Clarke, 2013: 5; Silverman, 2005: 160). Thematic analysis finds important themes and patterns of meaning in data (Joffe, 2011: 209). Both content analysis and thematic analysis are considered somewhat objective and systematic through the use of a detailed coding manual that specifies content of interest. As such they can produce accurate and sensitive analysis (Boyatzis, 1998: 5; Bryman and Bell, 2007: 302).

A criticism of content analysis is that it pushes focus on to content that is measurable rather than content that is theoretically significant (Bryman and Bell, 2007: 321). It can remove categories from their context, whereas thematic analysis can highlight observable instances of a theme, or identify implicit references (Joffe, 2011: 209–211). Thematic analysis then, can potentially provide the systematic rigour of content

analysis while also allowing consideration of subtleties and latent meaning (Joffe, 2011: 211). In discussing the nature of organisational documentation I saw the importance of considering context in terms of why the document was written, who it was written for and how the audience received it. This is the same for interviews, participants are aware that they are involved in research meaning that this context is important for the researcher conducting analysis. This suggests that thematic analysis was more appropriate for my study.

Thematic analysis can be deductive, inductive or a mixture of both, with themes decided in advance or generated from the text (Braun and Clarke, 2013: 178; Fereday and Muir-Cochrane, 2006: 83; Joffe, 2011: 210). The former is important so that the researcher can avoid 're-inventing the wheel', but also refute existing studies where appropriate. However, the latter enables the researcher to 'stay open' to unexpected findings (Joffe, 2011: 2010). As such, the analysis process is necessarily iterative, as previously coded sections must be reviewed if a new theme is recognised (Fereday and Muir-Cochrane, 2006: 83)

Validity is a concern in such types of analysis as the researcher must decide what fits into each category or theme and it can be claimed that researchers choose content that supports their interpretation (Lee Abbott and McKinney, 2013: 322). The usual recommendation is that the categorisation is undertaken by two different researchers and their consistency checked, but this was not possible in my study as I was working alone (Fereday and Muir-Cochrane, 2006: 90). Where two researchers are not available, Guest et al. recommend that the single researcher re-code the data after a break and compare the two instances (Guest et al., 2012: 70).

### *Method*

I undertook my analysis using NVivo, which aids in the coding of data. Using computer software helps researchers maintain rigour (Silverman, 2005: 190–191).

After uploading all documentation and the transcripts into NVivo, I categorised them by LA. I first reviewed the text to identify data on specific themes. Initially, I coded the text using themes identified through my literature review, and I regularly reviewed the themes throughout the process in case there were impacts that I did not expect. Following this initial coding, I reviewed each theme to identify sub-themes. While coding, I endeavoured to remain aware of my pre-conceived ideas. I repeated the analysis after a break of one month and then reconciled the two results by identifying the differences and making a final decision about which to include.

## **5.4 Summary**

The methodology and methods described in this chapter show that I undertook a systematic, data-rich study of the impacts of austerity on LAMs in England. By using mixed methods I undertook a comprehensive analysis within the resources and time available.

The following chapters detail and discuss my findings. In Chapter Six, I cover the results of Phase One, the quantitative national overview. In subsequent chapters, I discuss the findings of Phase Two and Phase Three, the thematic analysis of organisational documentation and interviews.

## 6 National Overview

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This chapter presents the results of Phase One: the quantitative national overview of LAMs. As described in Section 5.3.2, I undertook a statistical analysis of data collected for all LAs in England to define the population of LAMs and create an overview of the structural features of the impact of austerity upon them. The first purpose of this analysis was to enable the construction of a sampling framework so that a sample of LAs could be taken for more detailed work. The second purpose was to begin to answer my first research question ‘How has government austerity affected local authority museums in England? How does it continue to affect them?’

In this chapter I begin by looking at LAMs prior to the financial crisis in order to understand the starting point for the study. I then go on to quantify the impacts of austerity on LAM finances and governance. I conclude by discussing the application of the results to the creation of a sampling strategy.

### 6.1 Local Authority Museums in January 2008

#### 6.1.1 Overview

Out of 353 LAs, 189 (53.54%) managed/governed LAMs in January 2008 (Table 4). There were a total of 456 LAMs in existence at this time. The definition of a LAM for this study was described in Section 5.3.2.

**Table 4: Number of LAs with LAMS in January 2008**

	LAs	
	Count	%
<b>Without LAMS</b>	164	46.46
<b>With LAMs</b>	189	53.54

*n*=353

#### *Revenue Expenditure*

The details of the financial information used in this study were described in Section 5.3.2. In brief, LAs report expenditure on museums within a category titled ‘Museums and Galleries’ and another titled ‘Heritage Services’. It is not possible to extract data on expenditure on LAMs only. Both figures for Museums and Galleries and Heritage Services were included as they were used interchangeably by LAs: for example Bath and North East Somerset Council reports expenditure under Heritage Services but

none under Museums and Galleries despite running the Victoria Art Gallery. Reported expenditure in both categories was therefore used in this study, but is assumed to include expenditure on other heritage themed services and grants to museums not managed by the LA directly. Nonetheless, this is the best available data for all LAs in England. The earliest data available was for financial year 2008-2009.

Expenditure in these categories is variable, as shown in Table 5. One LA spent £16m in 2008-2009 whereas others spent nothing. There were 61 LAs (17.28%) that did not report any expenditure in either category in 2008-2009.

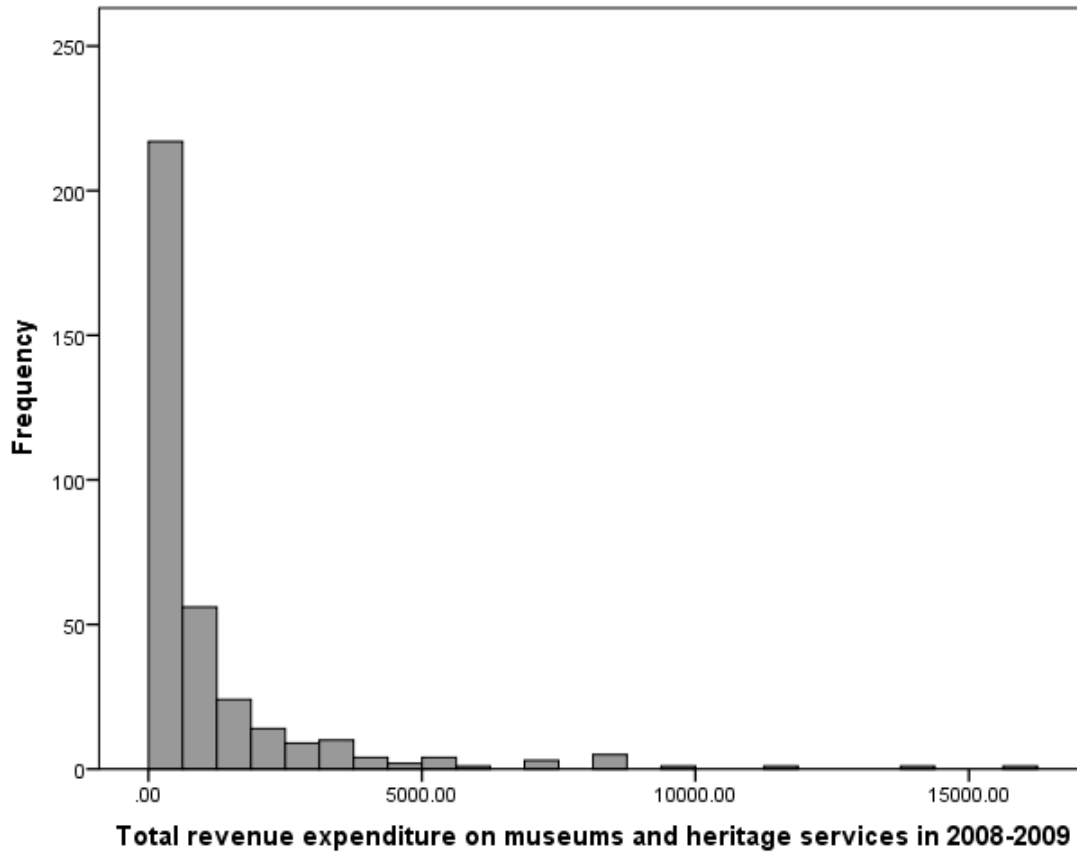
**Table 5: Gross Revenue Expenditure on Museums and Heritage services in 2008-2009**

	<b>Expenditure (£000s)</b>
<b>Mean</b>	1087.45
<b>Median</b>	406.86
<b>Std. Deviation</b>	1992.43
<b>Minimum</b>	0
<b>Maximum</b>	16106.29
<b>Without expenditure on Museums and Heritage</b> Number of LAs (%)	61 (17.28)
<b>With Expenditure in Museums and Heritage</b> Number of LAs (%)	292 (82.71)

*n=353, (Local Government Financial Statistics (LGFS))*

Expenditure on museums and galleries and heritage services is not normally distributed, with most LAs spending at the lower end of the range, as shown in Figure 2. As might be expected, in 2008-2009 LAs that governed and managed their own museums spent considerably more than those that did not (median £792,000 compared to median £35,000). Due to the data not being normally distributed it was necessary to test this relationship using a non-parametric test, and therefore a Kruskal-Wallis Test was used, which gave a p-value of less than 0.001 (Table 6). This suggests that the difference in expenditure observed did not occur by chance and that whether an LA governed and managed LAMs or not was a factor in their expenditure on museums.

**Figure 2: Gross Revenue Expenditure on Museums and Heritage Services in 2008-2009 (000s) - Histogram**



*n=353, (LGFS)*

**Table 6: Gross Revenue Expenditure on Museums and Heritage Services in 2008-2009, by Whether LA has LAMS – Kruskal-Wallis Test**

	Expenditure (£000s)	
	Without LAMs	With LAMs
<b>Mean</b>	440.38	1630.04
<b>Median</b>	35.93	792.86
<b>Std. Deviation</b>	1218.70	2328.72
<b>Minimum</b>	0	0
<b>Maximum</b>	8576.50	16106.29
<b>P-Value</b>	<0.001	

*n=353, (LGFS)*

For LAs with LAMs only (those that managed and governed museums directly, rather than providing grants to independent museums etc.), there is a clear increase in average expenditure as the number of LAMs increased (Table 7). A Kruskal-Wallis test was again the most appropriate here, and gave a p-value of less than 0.001, suggesting that the observed difference did not occur by chance. As might be expected, LAs with more LAMs spent more in these categories in 2008-2009.

**Table 7: Gross Revenue Expenditure on Museums and Heritage Services in 2008-2009, for LAs with LAMS Only, by Number of LAMs – Kruskal-Wallis Test**

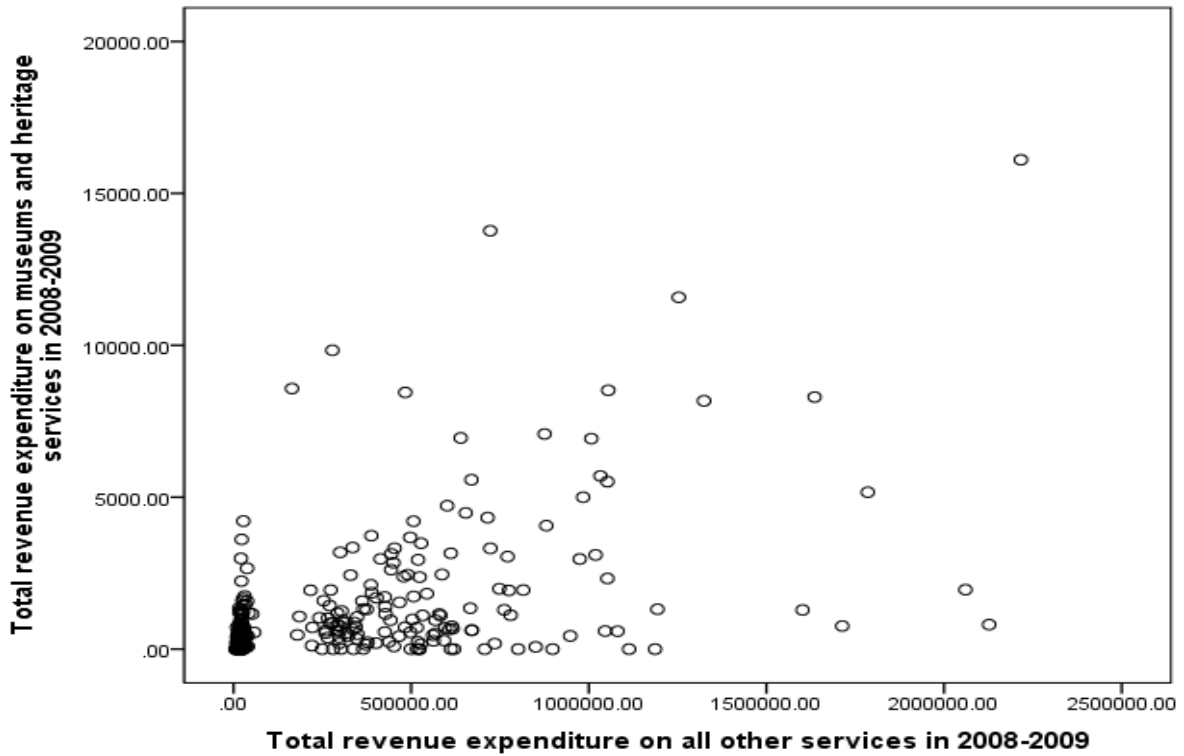
	Expenditure (£000's)		
	One	Two	Three or More
<b>Mean</b>	610.79	1241.67	3172.68
<b>Median</b>	457.86	813.72	2371.61
<b>Std. Deviation</b>	538.92	1537.77	3150.96
<b>Minimum</b>	0	162.28	0
<b>Maximum</b>	2984.79	8519.70	16106.29
<b>P-value</b>	<0.001		

*n=189, (LGFS)*

In comparing expenditure on museums and heritage services and on other services, statistical testing options are limited due to the data being non-normally distributed. Ideally, a regression analysis would be undertaken but this is not appropriate with non-normal data. As such, I was limited to correlation analysis as Spearman's correlation can be undertaken with non-normal data.

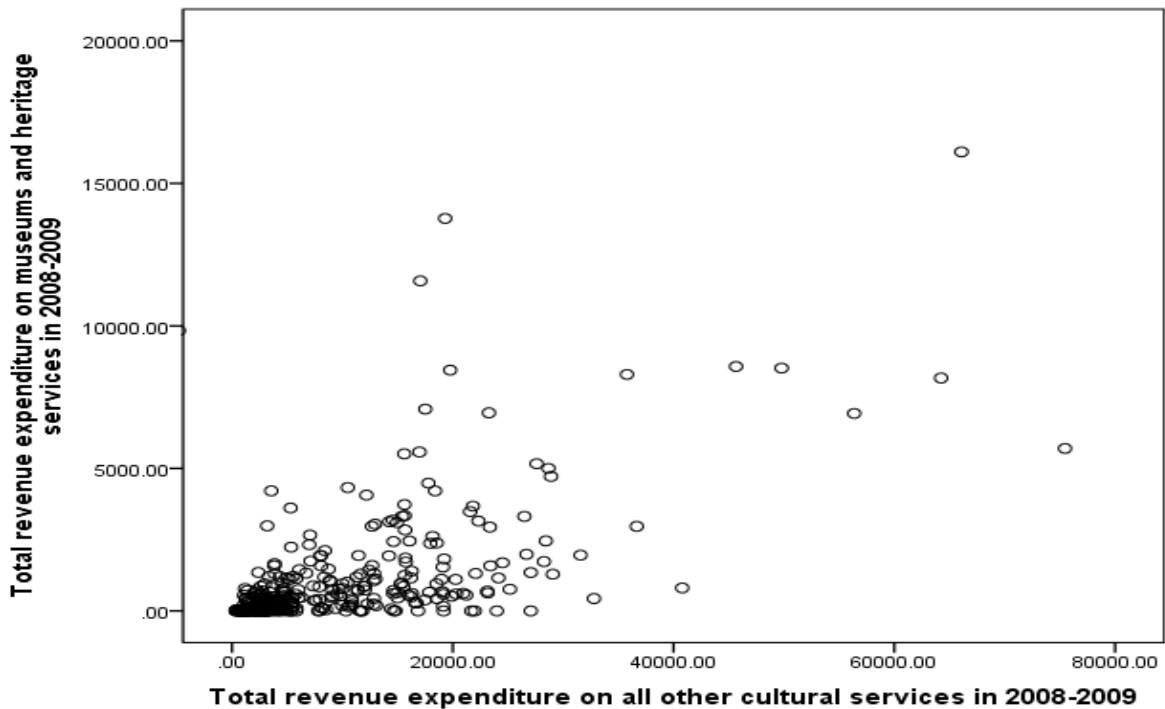
There was only moderate correlation ( $\rho = 0.57$ ) between expenditure on museums and heritage services and expenditure on all other services in 2008-2009, suggesting that there is some consistency in how LAs spent on museums as part of their overall expenditure but no strict rule (Figure 3). The correlation between expenditure on museums and heritage services and expenditure on other cultural services is slightly stronger ( $\rho = 0.61$ ), suggesting that LAs often had similar strategies for their different cultural services but varying approaches remained (Figure 4).

**Figure 3: Gross Revenue Expenditure on Museums and Heritage in 2008-2009 Compared to Gross Revenue Expenditure on All Other Services in 2008-2009**



*Spearman's Correlation:  $\rho = 0.57$ ,  $n=353$ , (LGFS)*

**Figure 4: Total Revenue Expenditure on Museums and Heritage in 2008-2009 Compared to Total Revenue Expenditure on All Other Cultural Services in 2008-2009**



*Spearman's correlation:  $\rho = 0.61$ ,  $n=353$ , (LGFS)*



Overall, the data suggested that in 2008-2009 revenue expenditure on museums and heritage was highly variable, but related to the number of LAMs that the LA had. Correlation between expenditure on museums and heritage and expenditure on other services was moderate: while LAs with higher overall expenditure tended to spend more on museums and heritage, as one might expect, the variation indicated that there were other factors involved as well.

### *Capital Expenditure*

One would expect capital expenditure to be more difficult to analyse and interpret than revenue expenditure due to its nature. While revenue expenditure covers day to day expenses, capital expenditure is tied to the acquisition or improvement of assets and is more variable year on year. This means that analysing data from one year does not give a reliable picture as a LA may have a large capital project one year and nothing in another.

As with revenue expenditure, in 2008-2009 capital expenditure varied widely and, as would be expected, there was a distinct difference in expenditure between LAs with LAMs and without. A Kruskal-Wallis test confirmed that this difference is unlikely to have occurred by chance, with LAs with LAMs tending to have had higher capital expenditure in 2008-2009 (Table 8). Further, capital expenditure tended to increase as the number of LAMs increased (Table 9).

**Table 8: Total Capital Expenditure on Museums and Heritage Services in 2008-2009 (000s), by Whether LA has LAMS – Kruskal-Wallis Test**

	Without LAMs	With LAMs
<b>Mean</b>	20.86	596.73
<b>Median</b>	0	62.59
<b>Std. Deviation</b>	539.17	2320.53
<b>Minimum</b>	-5154.71	-178.51
<b>Maximum</b>	3699.98	24636.42
<b>P-value</b>	<0.001	

*n=353, (LGFS)*

**Table 9: Total Capital Expenditure on Museums and Heritage Services in 2008-2009 (000s), by Number of LAMs – Kruskal-Wallis Test**

	One	Two	Three or More
<b>Mean</b>	89.43	225.72	1441.79
<b>Median</b>	20.86	53.32	279.35
<b>Std. Deviation</b>	223.18	521.86	3715.41
<b>Minimum</b>	-107.80	-178.51	0
<b>Maximum</b>	1374.74	2468.97	24636.42
<b>P-value</b>	<0.001		

*n=189, (LGFS)*

### **6.1.2 By Region**

When grouping LAs by region, the Midlands and Northern regions appeared to be more reliant on LAs for supply of museums than the South and East. Over 29% of the museums in the Midlands and Northern regions were LAMs in January 2008 (Table 10 and Table 11). The North East and Yorkshire and Humber had the highest number of LAMs per person. The South East, South West, and the East had larger overall numbers of museums, but less than 22% of them were LAMs. In each case, less than 50% of regional LAs had LAMs.

Two regions had slightly anomalous results. London had 27 LAMs, which was only 11.7% of the museums in the region. However, 60.61% of LAs in the region had LAMs, which was above average. This suggests that the low percentage in the first case was due to the high number of other museums in the region rather than the low importance of museums to the LAs. Over 35% of museums in the East Midlands were LAMs, which was above average, but only 37.78% of LAs in the region had LAMs. Further, the East Midlands had the fewest museums per person, with one museum for every 46,000 residents. This suggests that LAMs were prominent in the first measure due to the low number of museums overall.

LAs in the East, East Midlands and London spent the least on museums on average (Table 12). Expenditure varied the least in London: while a fairly high number of London LAs had LAMS, they do not spend very much each.

Overall, LAMs appeared to be more important to LAs in the Northern regions. One can speculate that the apparent lower importance of LAMs to LAs in the Southern regions

was due to the availability of other museums in these areas, particularly the concentration of National Museums in London.

**Table 10: LAMs in 2008, by Region**

<b>Regions</b>	<b>Estimated museums in region</b> Count	<b>LAMs in region</b> Count	<b>Museums in region that are LAMs</b> %	<b>Population of region age 16+</b> 000s	<b>Population per museum</b> 000s	<b>Population per LAM</b> 000s	<b>Gross expenditure on Museums and Heritage Services per person</b>
<b>London</b>	231	27	11.7	6450.43	27.92	238.90	3.65
<b>South East</b>	372	82	22.0	11888.86	31.96	141.53	4.53
<b>South West</b>	291	45	15.5	6100.61	20.96	135.57	8.21
<b>East</b>	245	50	20.4	7673.76	31.32	153.48	6.03
<b>East Midlands</b>	141	50	35.5	6504.49	46.13	130.09	5.70
<b>West Midlands</b>	161	56	34.8	6726.85	41.78	120.12	7.71
<b>Yorkshire and Humber</b>	190	63	33.2	4670.77	24.58	74.14	9.57
<b>North East</b>	89	27	30.3	2089.08	23.47	77.37	11.29
<b>North West</b>	189	56	29.6	6943.89	36.74	119.72	7.62

*(LGFS; Museums Association, n.d.; Office for National Statistics, 2014b)*

**Table 11: LAs and LAMs, by Region – Chi-Square Test**

		Region								
		East	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
<b>Without LAMs</b>	<b>Count</b>	27	28	13	1	14	38	23	12	8
	<b>%</b>	51.92%	62.22%	39.39%	8.33%	34.15%	51.35%	56.10%	36.36%	36.36%
<b>With LAMs</b>	<b>Count</b>	25	17	20	11	27	36	18	21	14
	<b>%</b>	48.08%	37.78%	60.61%	91.67%	65.85%	48.65%	43.90%	63.64%	63.64%
<b>P-value</b>		0.011								

*n=353, (LGFS; Office for National Statistics, 2014b)*

**Table 12: Gross Revenue Expenditure on Museums and Heritage Services in 2008-2009 (000s), by Region – Kruskal-Wallis Test**

	East	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
<b>Mean</b>	1300.70	1921.65	562.13	1736.92	1474.07	1383.24	2485.27	2064.91	2480.48
<b>Median</b>	498.43	497.27	545.96	1690.03	730.26	775.47	1083.22	1111.62	1838.98
<b>Std. Deviation</b>	2314.46	2492.18	303.30	861.08	1807.01	1965.93	3613.34	3344.95	2105.42
<b>Minimum</b>	0.00	232.99	88.09	465.98	75.34	0.00	111.28	59.12	369.77
<b>Maximum</b>	11578.68	7081.20	1345.76	3185.32	8519.70	8448.99	13770.62	16106.29	8170.80
<b>P-value</b>	0.004								

*n=353, (LGFS; Office for National Statistics, 2014b)*

### 6.1.3 By class of LA

In January 2008, Unitary Authorities were most likely to have LAMs, closely followed by Metropolitan Districts, whereas Shire Districts were the least likely (Table 13).

Nonetheless, due to there being 201 Shire Districts, this class of LA had the highest number of LAMs and therefore remained important to LAM provision.

**Table 13: Number of LAs with LAMs, by Class of LA – Chi-Square Test**

		Shire District	London Borough	Unitary Authority	Shire County	Metropolitan District
<b>Without LAMs</b>	<b>Count</b>	119	13	12	12	8
	<b>%</b>	59.20	39.39	21.43	44.44	22.22
<b>With LAMs</b>	<b>Count</b>	82	20	44	15	28
	<b>%</b>	40.80	60.61	78.57	55.56	77.78
<b>P-value</b>		<0.001				

*n=353, (LGFS; Office for National Statistics, 2014b)*

I previously saw a potential relationship between likelihood of having LAMs and LA region as well. A chi-square test shows that LA region and LA class are related ( $p < 0.001$ ). For example, the North East is made up of Metropolitan Districts and Unitary Authorities, and does not have any Shire Districts or Shire Counties. In contrast, the South East is made up of 75% Shire Districts. As such, to investigate which of these factors influences museum provision, I performed a logistic regression analysis (Table 14). This test constructs a regression model for each variable individually and then applies one the other to see if what effect it has on the result. The results of this test were that region did not improve the model for class, where class improved the model for region. This suggests that LA class is more likely to be the factor that is associated with whether an LA manages/governs LAMs than LA region.

**Table 14: Number of LAs with LAMs, by Class of LA and by Region - Logistic Regression**

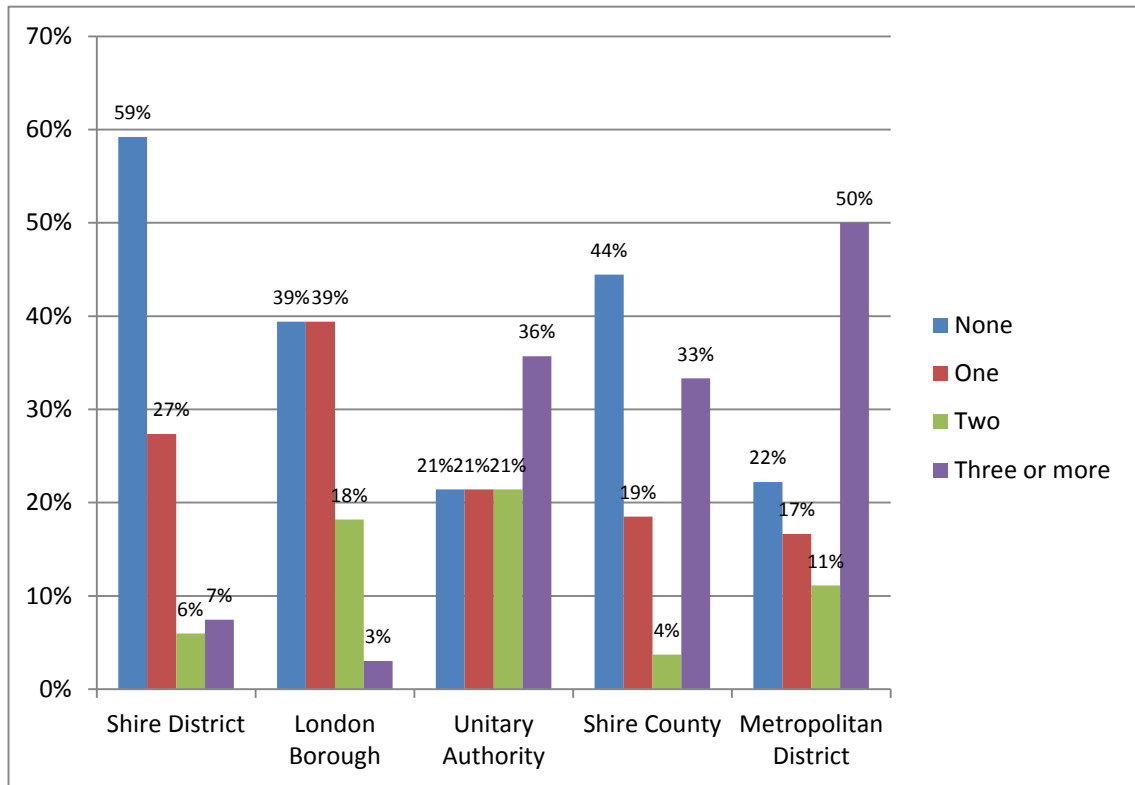
	Odds ratio	95% Confidence Interval	
		Lower	Upper
<b>Yorkshire and Humber</b>	N/A		
<b>East</b>	0.97	0.31	3.03
<b>East Midlands</b>	0.64	0.20	2.07
<b>London</b>	Omitted due to collinearity with LA Class London Borough		
<b>North East</b>	3.53	0.37	33.77
<b>North West</b>	1.34	0.43	4.20
<b>South East</b>	0.92	0.31	2.77
<b>South West</b>	0.60	0.18	1.96
<b>West Midlands</b>	1.48	0.45	4.89
<b>P-value</b>	0.48		
<b>Unitary Authority</b>	N/A		
<b>Shire District</b>	0.20	0.10	0.42
<b>London Borough</b>	0.41	0.11	1.54
<b>Shire County</b>	0.38	0.14	1.05
<b>Metropolitan District</b>	0.67	0.22	2.04
<b>P-value</b>	<0.001		

*n=353, (LGFS; Office for National Statistics, 2014b)*

Of those LAs that did manage LAMs, Shire Districts and London Boroughs most commonly only managed one each, while Metropolitan Districts, Shire Counties and Unitary Authorities commonly managed three or more (Figure 7 and Table 15).



**Figure 5: Number of LAMs per LA, by Class of LA**



*n=353, (LGFS; Office for National Statistics, 2014b)*

**Table 15: Number of LAMs per LA, by Class of LA – Chi-Square Test**

Number of LAMs		Class				
		London Borough	Metropolitan District	Shire County	Shire District	Unitary Authority
None	Count	13	8	12	119	12
	%	39.39%	22.22%	44.44%	59.20%	21.43%
One	Count	13	6	5	55	12
	%	39.39%	16.67%	18.52%	27.36%	21.43%
Two or more	Count	7	22	10	27	32
	%	21.21%	61.11%	37.04%	13.43%	57.14%
P-value		<0.001				

*n=353, (LGFS; Office for National Statistics, 2014b)*

However, while Metropolitan Districts managed the most museums per LA, they commonly did so alone, with 28.57% of Metropolitan Districts that managed LAMs

doing so in collaboration with other organisations, such as other LAs or charitable Trusts (Table 16). On the other hand, Shire Counties, which also often managed three or more museums, commonly did so in partnership, with 60.00% of this class of LA having partnerships with other organisations for LAMs.

**Table 16: How LAs Governed/Managed Their LAMs**

		Shire District	London Borough	Unitary Authority	Shire County	Metropolitan District
<b>With Collaborators</b>	<b>Count</b>	14	4	7	9	8
	<b>%</b>	17.07	20.00	15.91	60.00	28.57
<b>Without Collaborators</b>	<b>Count</b>	68	16	37	6	20
	<b>%</b>	82.93	80.00	84.09	40.00	71.43

*n=189, (Museums Association, n.d.)*

To test this relationship statistically I undertook a logistic regression analysis (Table 17). While the model overall produced a p-value greater than 0.05, the confidence intervals for Shire County were both greater than the no-effect value of 1, giving evidence that Shire Counties did indeed manage museums more commonly with collaborators.

**Table 17: Collaboration for Governance and/or Management in 2008, for LAs with LAMs and by Class of LA – Logistic Regression**

	Odds Ratio	95% Confidence Interval	
		Lower	Upper
<b>Unitary Authority</b>	N/A		
<b>London Borough</b>	0.85	0.23	3.13
<b>Metropolitan Borough</b>	1.61	0.56	4.65
<b>Shire County</b>	6.80	1.88	24.56
<b>Shire District</b>	0.91	0.38	2.19
<b>P-value</b>	0.11		

*n=189, (Museums Association, n.d.)*

Shire Districts spent the least on museums and are the only class of LA to sometimes spend nothing (Table 18). Shire Counties spent the most, followed by Metropolitan Districts.

**Table 18: Gross Revenue Expenditure on Museums and Heritage Services in 2008-2009, by Class of LA – Kruskal-Wallis Test**

	Expenditure (£000s)				
	London Borough	Metropolitan District	Shire County	Shire District	Unitary Authority
<b>Mean</b>	562.13	2956.77	3668.07	704.21	2364.94
<b>Median</b>	545.96	1838.98	1943.88	446.27	1184.64
<b>Std. Deviation</b>	303.30	3237.28	3260.32	761.20	2738.91
<b>Minimum</b>	88.09	494.95	594.64	0.00	113.60
<b>Maximum</b>	1345.76	16106.29	11578.68	4212.33	13770.62
<b>P-value</b>	<0.001				

*n=353, (LGFS; Office for National Statistics, 2014b)*

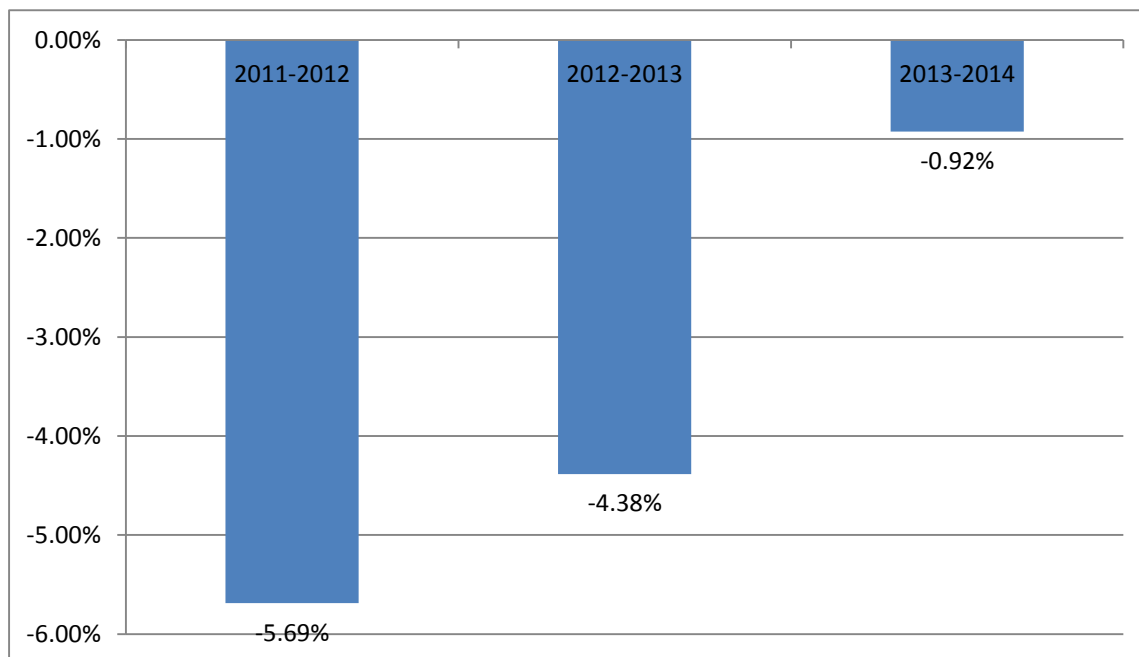
Overall, this analysis suggests that Shire Districts and London Boroughs had the simplest structures for LAMs, generally only managing one and with few collaborations for governance or management. Metropolitan Districts often managed multiple museums, but tended to do so alone, whereas Shire Counties appeared to have the most complex LAMs, often having multiple and managing in collaboration with other organisations.

## 6.2 The Financial Impact of Austerity

### 6.2.1 Overview

The spending power of LAs has been reported since 2011-2012. Spending power is the combination of central government funding and the money that LAs raise themselves through council tax and business rates (Hastings et al., 2013: 2), and therefore this measure helps to illustrate the financial pressures on LAs since the Comprehensive Spending Review. Figure 8 shows that spending power dropped rapidly at the beginning of the period. Unfortunately, reports of spending power were not found for before 2011-2012.

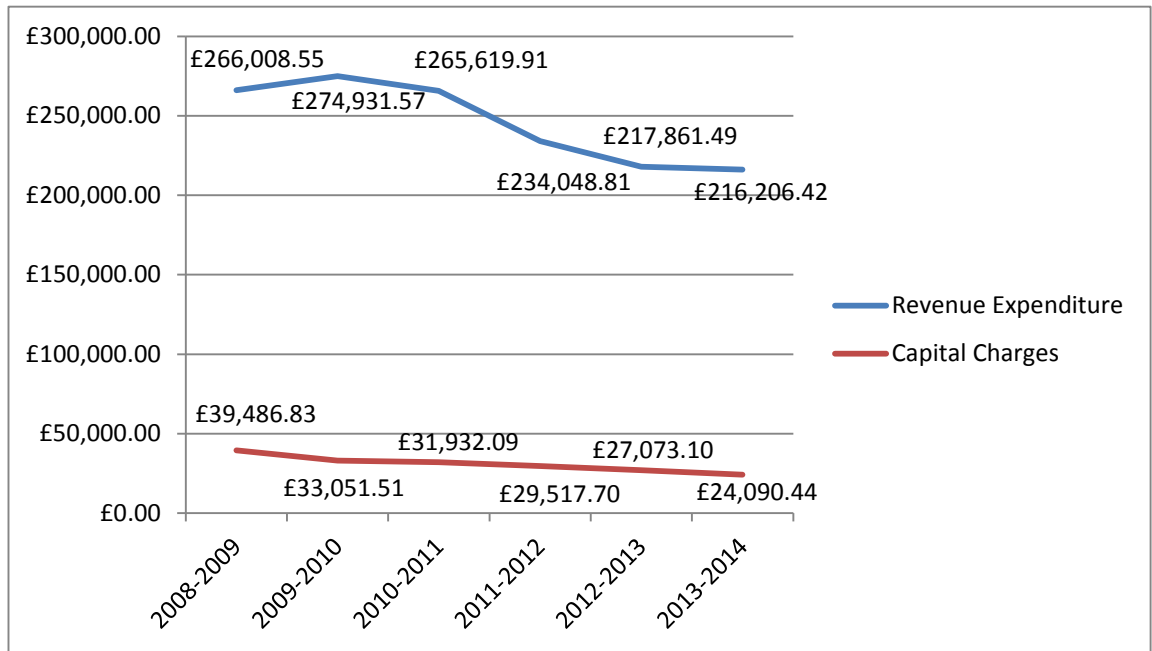
**Figure 6: Average Percentage Change in Spending Power Compared to the Previous Year**



(LGFS)

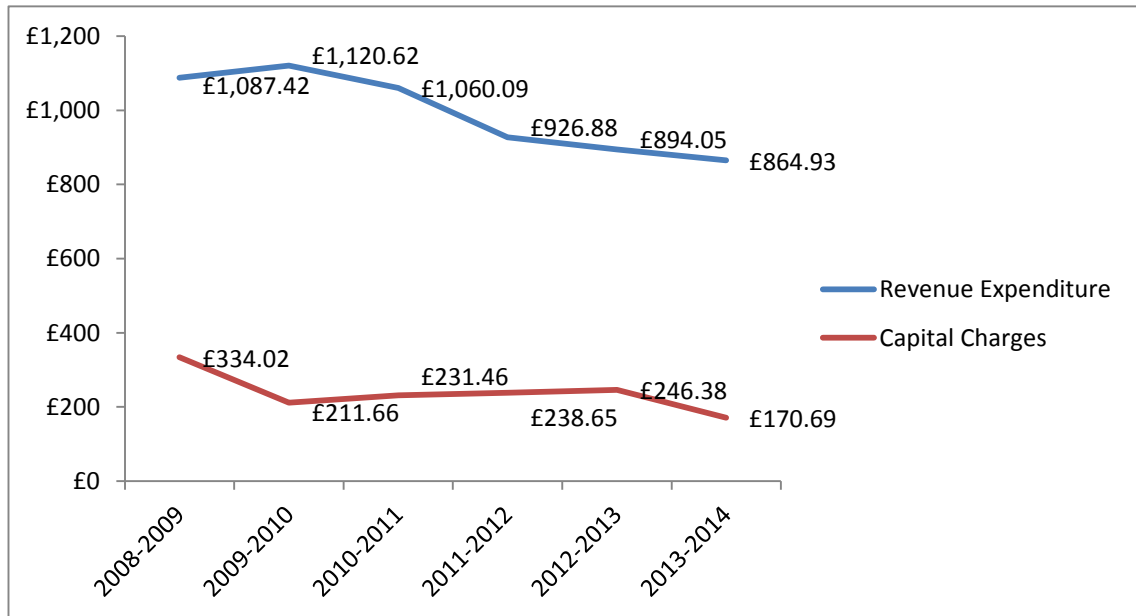
This reduction in spending power has translated into reduced spending on services. As illustrated by Figure 9, average LA revenue expenditure on all services in 2013-2014 was around 18% lower than in 2008-2009. Capital expenditure has also declined, with the average spend in 2013-2014 being almost 40% lower than in 2008-2009. Focusing in on expenditure on museums and heritage services, there is a decline of around 20% for revenue expenditure and 49% for capital charges (Figure 10). It appears that museums have weathered slightly greater overall cuts than LA services as a whole.

**Figure 7: Average Gross LA Expenditure on All Services Over Time (£000s)**



(LGFS)

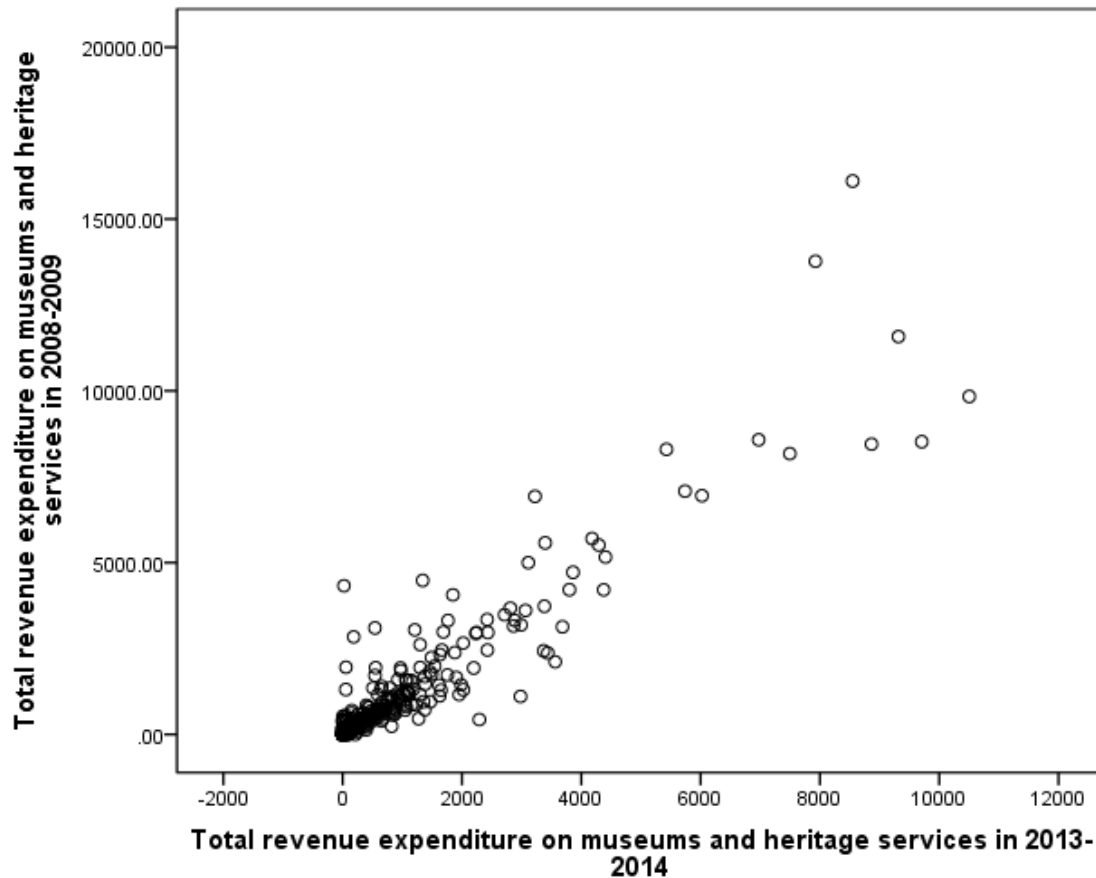
**Figure 8: Average Gross LA Expenditure on Museums and Heritage Services Over Time (£000s)**



(LGFS)

Statistically, there is strong evidence for linear correlation between total revenue expenditure on museums and heritage in 2008-2009 and in 2013-2014 ( $\rho = 0.92$ , Figure 11), suggesting that cuts have been made in proportion to the original level of expenditure.

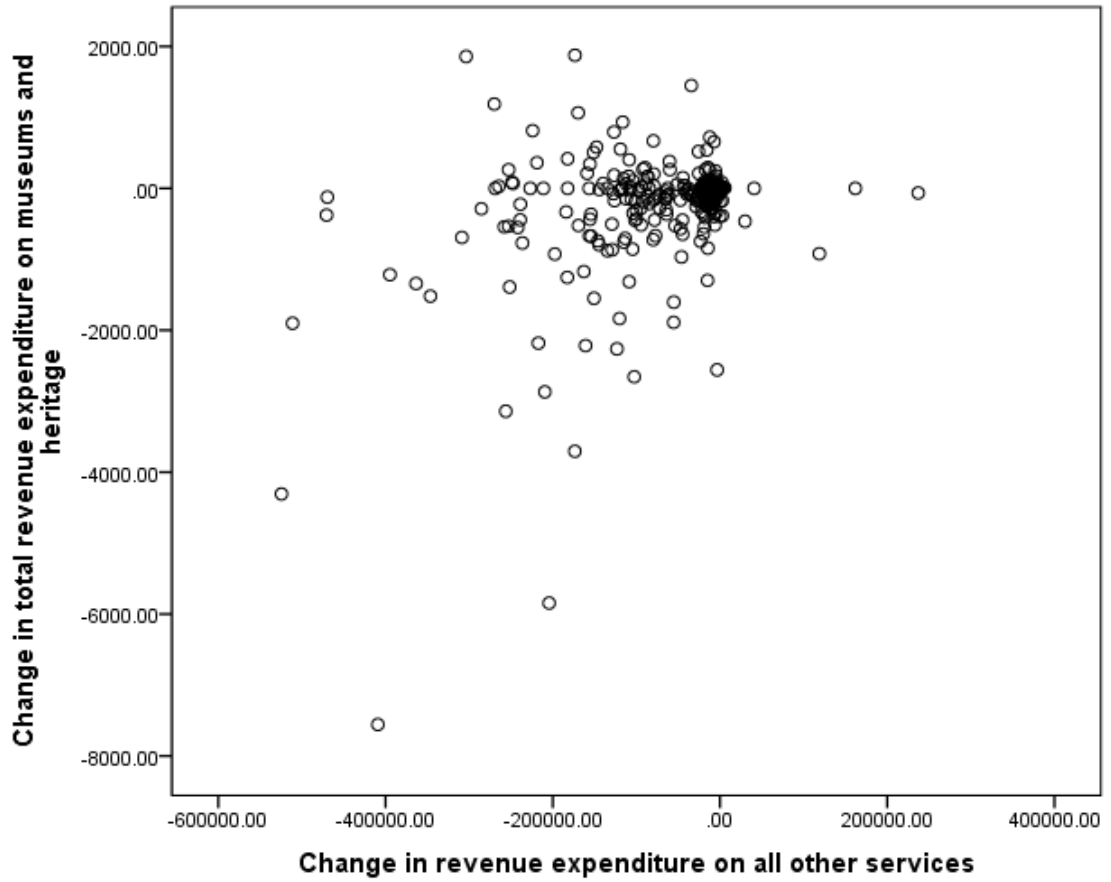
**Figure 9: Gross Revenue Expenditure on Museums and Heritage in 2008-2009 Compared to 2013-2014**



*Spearman's correlation:  $\rho = 0.92$ ,  $n=353$ , (LGFS)*

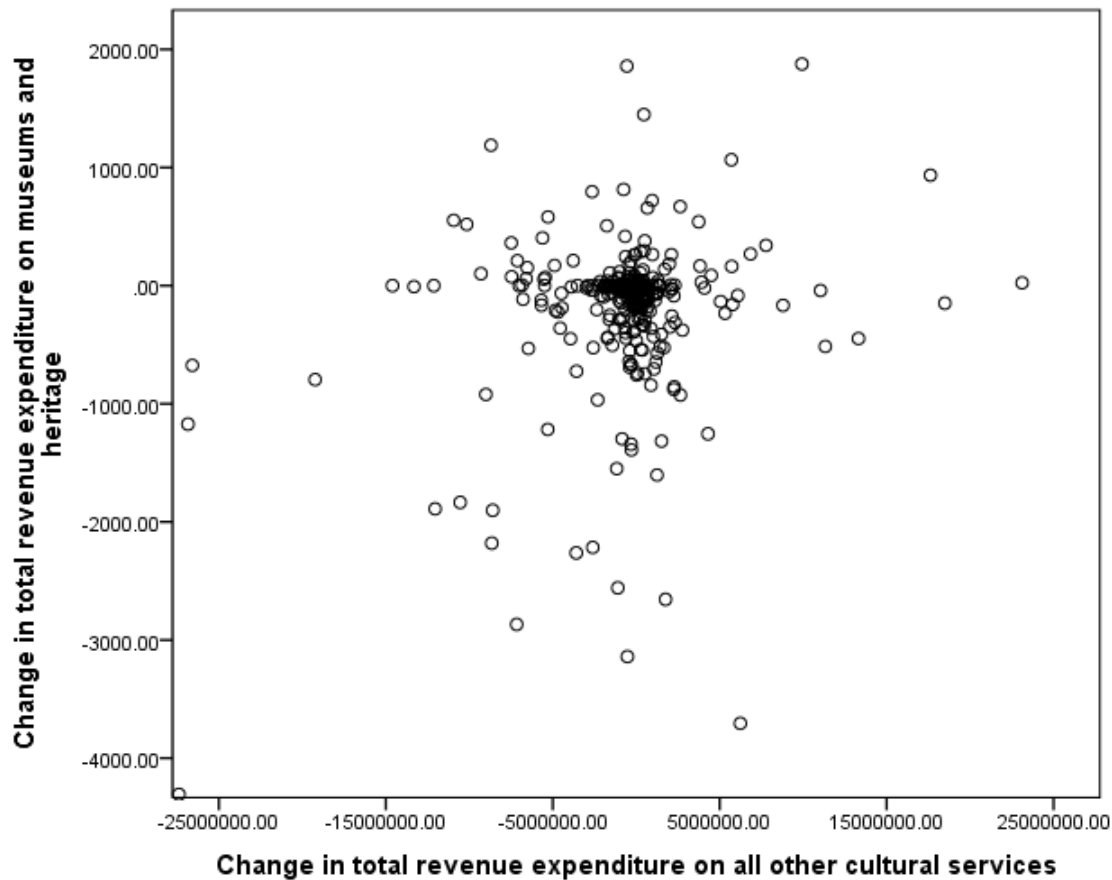
However, there does not appear to be a relationship for how cuts were made on museums and heritage services compared to other services. I previously showed moderate correlation between 2008-2009 revenue expenditure on museums and heritage and on all other services, and with other cultural services. Looking at actual change in these figures I find weak correlation ( $\rho = 0.23$  for all services and  $\rho = 0.19$  for cultural services). One might have expected that one policy would have been followed for cuts in expenditure but this does not appear to have been the case, as illustrated in Figure 12 and Figure 13. In particular, one might have expected a relationship within cultural services but there is no evidence of this: museums and heritage appear to have been treated differently to other cultural services.

**Figure 10: Change in Gross Revenue Expenditure on Museums and Heritage Compared to Change in Gross Revenue Expenditure on All Other Services**



*Spearman's correlation:  $\rho = 0.23$ ,  $n=353$ , (LGFS)*

**Figure 11: Change in Gross Revenue Expenditure on Museums and Heritage Compared to Change in Gross Revenue Expenditure on All Other Cultural Services**



*Spearman's correlation:  $\rho = 0.19$ ,  $n=353$ , (LGFS)*

This is further evidenced by categorising the data simply by whether expenditure has increased, decreased or stayed within 10% of the 2008-2009 figure (labelled 'no change' for ease of review). I made the decision to divide the data in this way to acknowledge that some change in expenditure year on year is typical and therefore it is worth distinguishing a small change from a large change. That the 10% figure chosen is appropriate is an assumption that must be taken into account in interpreting the results, nonetheless it allows analysis of different degrees of change.

Only 7 LAs have increased their expenditure on all services and only 12 have increased their expenditure on other cultural services, whereas 72 have increased their expenditure on museums and heritage. It appears that while funding to LAMs has declined on average, it is more common for LAs to have increased funding for this service than other services. This is shown in Table 19 and Table 20.



**Table 19: Comparison of Change in Gross Revenue Expenditure between 2008-2009 and 2013-2014 on All Services except Museum and Heritage and Museums and Heritage Services**

			All Services			Total
			Decrease	No Change	Increase	
Museums and Heritage	Decrease	Count	1	20	1	189
		%	10.6%	88.9%	0.5%	100.0%
	No Change	Count	77	10	5	92
		%	83.7%	10.9%	5.4%	100.0%
	Increase	Count	64	7	1	72
		%	88.9%	9.7%	1.4%	100.0%
<b>Total</b>		<b>Count</b>	309	37	7	353

*n=353, (LGFS)*

**Table 20: Comparison of Change in Gross Revenue Expenditure between 2008-2009 and 2013-2014 on All Cultural Services except Museum and Heritage and Museums and Heritage Services**

			Cultural Services			Total
			Decrease	No Change	Increase	
Museums and Heritage	Decrease	Count	169	14	6	189
		%	89.4%	7.4%	3.2%	100.0%
	No Change	Count	76	13	3	92
		%	82.6%	14.1%	3.3%	100.0%
	Increase	Count	61	8	3	72
		%	84.7%	11.1%	4.2%	100.0%
<b>Total</b>		<b>Count</b>	306	35	12	353

*n=353, (LGFS)*

### **6.2.2 By Region**

By region, the North East and North West have fared the worst in terms of spending power, with an average drop over the 4 financial years reported of 4.00% and 4.76% per year respectively (Table 21). The South East and South West have fared the best,

with their average declines being 3.23% and 3.01%. As such, one might expect that the northern regions will have cut expenditure on museums more deeply.

**Table 21: Average Change in Spending Power Compared to the Previous Year, by region**

	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>	<b>Average</b>
<b>London</b>	-5.26%	-3.85%	-0.74%	-3.28%
<b>South East</b>	-4.95%	-4.08%	-0.65%	-3.23%
<b>South West</b>	-4.72%	-3.88%	-0.43%	-3.01%
<b>East</b>	-5.72%	-4.53%	-0.66%	-3.63%
<b>East Midlands</b>	-6.51%	-5.15%	-0.95%	-4.20
<b>West Midlands</b>	-5.77%	-4.29%	-1.10%	-3.72%
<b>Yorkshire and Humber</b>	-5.94%	-4.10%	-0.81%	-3.62%
<b>North East</b>	-7.19%	-3.65%	-1.15%	-4.00%
<b>North West</b>	-6.75%	-5.29%	-2.22%	-4.76%

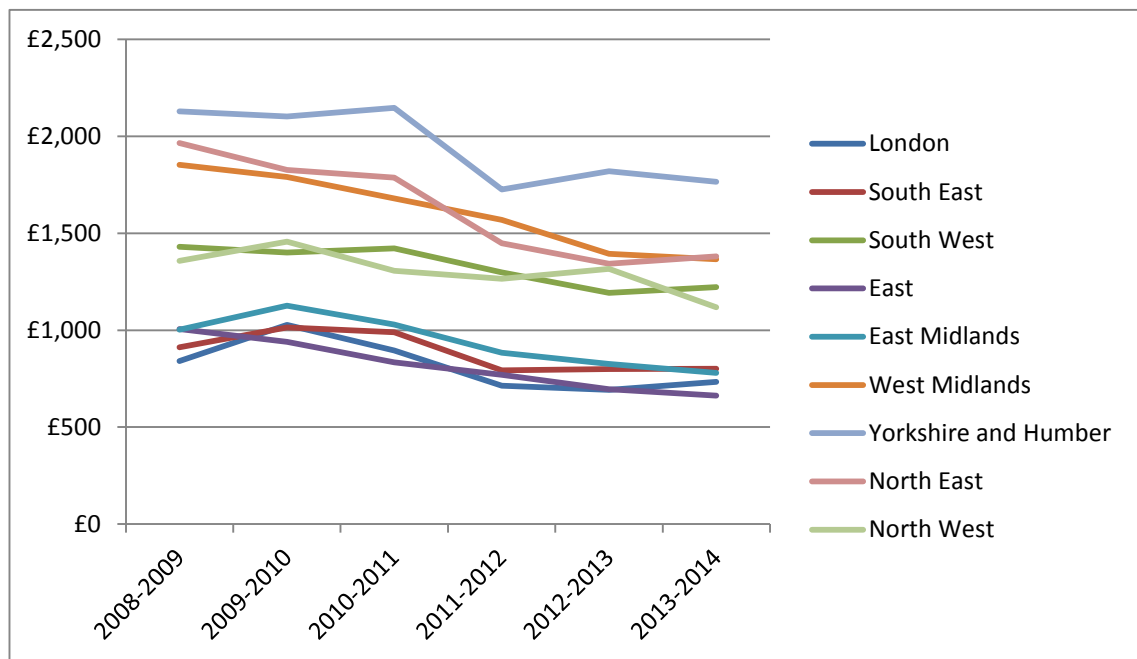
(LGFS)

However, I previously showed that LAM provision appears to be more important in these regions, and while the total decline in expenditure in the North East is one of the largest (29.78%), the North West has a below average cut of 17.66%. The East has the largest cut, with an overall drop of 34.20%, compared to the South East which has cut the least (12.28% on average). This is illustrated in Figure 14 and detailed in Table 22. The change in spending power for the Eastern region was on the lower end of the scale at 3.30% on average, suggesting that museums were considered a low priority for expenditure in this region. However, a Kruskal-Wallis test did not find a statistically significant difference in the cuts made in each region (Table 23).

Categorising the data simply by whether expenditure has increased, decreased or stayed within 10% of the 2008-2009 figure (labelled 'no change'), one can see that LAs in the North East have most commonly decreased their expenditure, whereas LAs in London have most commonly increased it, potentially in relation to the transfer of responsibility for the Museum of London away from DCMS in 2008 (Table 24). Overall, there is little that one can draw from the data that is conclusive. While the North East and North West have had the greatest reduction in spending power, they have differing responses to expenditure on museums, with the North East having cut more. The

clearest trend is in the East: in looking at 2008, I found that LAMs appeared to be of low importance in this region, with LAs spending less than in other regions, and here I see that LAs in the East have cut the most despite having a lower reduction in spending power.

**Figure 12: Change in Gross Revenue Expenditure on Museums and Heritage Services, by Region**



(LGFS)

**Table 22: Change in Gross Revenue Expenditure on Museums and Heritage Services, by Region**

	Average Expenditure on Museums and Heritage Services (£000s)						Change in Average Expenditure between 2008-2009 and 2013-2014	
	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	Actual (£000s)	%
<b>London</b>	840.05	1027.80	895.85	714.32	692.87	733.32	-106.73	-12.7
<b>South East</b>	912.50	1014.74	989.23	793.29	799.70	800.41	-112.09	-12.3
<b>South West</b>	1430.42	1400.00	1421.81	1298.68	1192.75	1222.11	-208.30	-14.6
<b>East</b>	1006.16	939.63	834.70	769.32	695.92	662.04	-344.12	-34.2
<b>East Midlands</b>	1002.03	1126.27	1028.59	883.15	826.21	779.76	-222.28	-22.2
<b>West Midlands</b>	1852.48	1790.00	1680.16	1569.24	1394.44	1366.29	-486.19	-26.3
<b>Yorkshire and Humber</b>	2128.35	2102.41	2147.73	1725.14	1819.46	1765.90	-362.45	-17.0
<b>North East</b>	1965.71	1827.04	1786.52	1447.80	1341.94	1380.42	-585.30	-29.8
<b>North West</b>	1357.03	1457.47	1306.68	1264.68	1316.18	1117.41	-239.62	-17.7

(LGFS)

**Table 23: Comparison of Change Ratio in Gross Revenue Expenditure between 2008-2009 and 2013-2014 on Museums and Heritage Services, by Region – Kruskal-Wallis Test**

	East	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
<b>Median</b>	0.83	0.79	0.99	0.76	0.83	1.00	0.87	0.82	0.77
<b>Std. Deviation</b>	7.23	0.36	0.60	0.22	0.53	0.48	0.97	0.49	0.43
<b>Minimum</b>	0.00	0.09	0.04	0.30	0.06	0.04	0.00	0.15	0.00
<b>Maximum</b>	51.76	1.73	2.85	1.07	2.96	3.42	5.30	2.70	1.69
<b>P-value</b>	0.81								

(LGFS)

**Table 24: Comparison of Change in Gross Revenue Expenditure between 2008-2009 and 2013-2014 on Museums and Heritage, by Region**

		Revenue Expenditure on Museums and Heritage		
		Decrease	No Change	Increase
<b>East</b>	<b>Count</b>	34	9	7
	<b>%</b>	68.0%	18.0%	14.0%
<b>East Midlands</b>	<b>Count</b>	28	11	5
	<b>%</b>	63.6%	25.0%	11.4%
<b>London</b>	<b>Count</b>	11	9	10
	<b>%</b>	36.7%	30.0%	33.3%
<b>North East</b>	<b>Count</b>	9	3	0
	<b>%</b>	75.0%	25.0%	0.0%
<b>North West</b>	<b>Count</b>	23	7	9
	<b>%</b>	59.0%	17.9%	23.1%
<b>South East</b>	<b>Count</b>	28	29	15
	<b>%</b>	38.9%	40.3%	20.8%
<b>South West</b>	<b>Count</b>	22	11	8
	<b>%</b>	53.7%	26.8%	19.5%
<b>West Midlands</b>	<b>Count</b>	18	9	6
	<b>%</b>	54.5%	27.3%	18.2%
<b>Yorkshire and Humber</b>	<b>Count</b>	14	4	4
	<b>%</b>	63.6%	18.2%	18.2%

*n=353, (LGFS)*

### **6.2.3 By Class of LA**

By class of LA, Metropolitan Districts have suffered the worst declines in spending power, with Shire Counties having been relatively secure (Table 25). Despite their lower cut in spending power, however, Shire Counties have cut the most from their museums expenditure in total, spending 26.48% less in 2013-2014 than they did in 2008-2009. This is illustrated in Figure 15 and detailed in Table 26. I previously showed

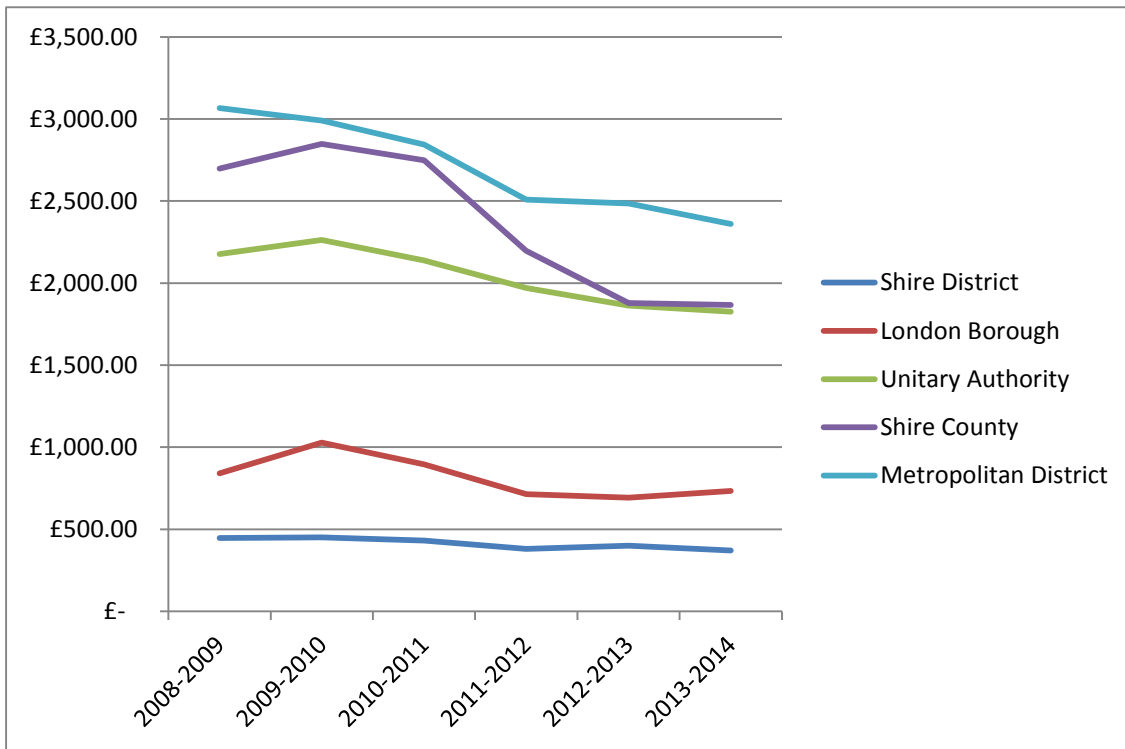
that Shire Counties have the most complex museums services, often managing multiple museums in collaboration with other organisations. One can speculate that Shire Counties were able to make savings due to economies of scale, or that they were able to pass a greater proportion of the burden on to their collaborators. In comparison, Shire Districts spent only 13.63% less. With their small, simply structured museums services, Shire Districts may have been unable to realise savings.

**Table 25: Average Change in Spending Power Compared to the Previous Year, by Class of LA**

	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>	<b>Average</b>
<b>Shire District</b>	-6.45%	-4.98%	-0.72%	-4.05%
<b>London Borough</b>	-5.26%	-3.85%	-0.74%	-3.28%
<b>Unitary Authority</b>	-4.36%	-3.51%	-1.18%	-3.02%
<b>Shire County</b>	-1.95%	-2.76%	-1.64%	-2.12%
<b>Metropolitan District</b>	-6.71%	-4.15%	-1.32%	-4.06%

(LGFS)

**Figure 13: Change in Gross Revenue Expenditure on Museums and Heritage Services, by Class of Authority (£000s)**



(LGFS)



**Table 26: Change in Gross Revenue Expenditure on Museums and Heritage Services, by Class of Authority**

	Average Expenditure on Museums and Heritage Services (£000s)						Change in Average Expenditure between 2008-2009 and 2013-2014	
	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	Actual (£000s)	%
<b>Shire District</b>	447.16	451.78	430.44	380.23	400.05	370.21	-76.96	-17.2
<b>London Borough</b>	840.05	1027.80	895.85	714.32	692.87	733.32	-106.73	-12.7
<b>Unitary Authority</b>	2176.48	2263.32	2137.81	1970.52	1862.74	1826.76	-349.72	-16.1
<b>Shire County</b>	2698.29	2848.04	2748.70	2197.39	1879.07	1866.33	-831.96	-30.8
<b>Metropolitan District</b>	3066.68	2990.76	2843.97	2508.93	2485.42	2360.76	-705.92	-23.0

(LGFS)

However, a Kruskal-Wallis test did not find a statistically significant difference in the cuts made in each type of LA (Table 27), neither was a relationship found when categorising change in expenditure and undertaking a chi-square test (Table 28)

**Table 27: Comparison of Change Ratio in Gross Revenue Expenditure between 2008-2009 and 2013-2014 on Museums and Heritage Services, by Class of LA – Kruskal-Wallis Test**

	London Borough	Metropolitan District	Shire County	Shire District	Unitary Authority
<b>Median</b>	0.99	0.78	0.78	0.86	0.91
<b>Std. Deviation</b>	0.60	0.49	0.39	3.68	0.76
<b>Minimum</b>	0.04	0.06	0.00	0.00	0.00
<b>Maximum</b>	2.85	2.70	1.45	51.76	5.30
<b>P-value</b>	0.72				

*n=353, (LGFS)*

**Table 28: Comparison of Change in Gross Revenue Expenditure between 2008-2009 and 2013-2014 on Museums and Heritage Services, by Class of LA – Chi-Square Test**

		Revenue Expenditure on Museums and Heritage Services		
		Decrease	No Change	Increase
<b>London Borough</b>	<b>Count</b>	12	9	12
	<b>%</b>	36.4%	27.3%	36.4%
<b>Metropolitan District</b>	<b>Count</b>	23	6	7
	<b>%</b>	63.9%	16.7%	19.4%
<b>Shire County</b>	<b>Count</b>	19	4	4
	<b>%</b>	70.4%	14.8%	14.8%
<b>Shire District</b>	<b>Count</b>	107	59	35
	<b>%</b>	53.2%	29.4%	17.4%
<b>Unitary Authority</b>	<b>Count</b>	28	14	14
	<b>%</b>	50.0%	25.0%	25.0%
<b>P-value</b>		0.095		

*n=353, (LGFS)*

#### **6.2.4 Other LA Characteristics**

I investigated other factors to see if they had an effect on change in expenditure on museums and heritage. Firstly, I found no correlation between change in revenue expenditure on museums and heritage and percentage unemployment in the LA

(Spearman's correlation,  $\rho = -0.12$ ). Political affiliation did not appear to have an effect on change in expenditure either, as shown in Table 29 and Table 30.

**Table 29: Relationship between LA Political Affiliation and Change Ratio in Gross Revenue Expenditure on Museums and Heritage Services between 2008-2009 and 2013-2014 – Kruskal-Wallis Test**

	Conservative	Labour	Liberal Democrat	NOC
<b>Median</b>	0.88	0.85	0.88	0.79
<b>Std. Deviation</b>	3.68	0.51	0.30	0.77
<b>Minimum</b>	0.00	0.06	0.40	0.00
<b>Maximum</b>	51.76	2.85	1.55	5.30
<b>P-value</b>	0.88			

*n=353, (Ball, 2013; BBC, 2008, 2009; City of London, 2014; Council of the Isles of Scilly, 2013a, 2013b; LGFS; Mid Sussex District Council, 2014; Northampton Borough Council, 2014; The Guardian, 2010, 2011, 2012, 2014)*

**Table 30: Relationship between LA Political Affiliation and Change Ratio in Gross Revenue Expenditure on Museums and Heritage Services between 2008-2009 and 2013-2014, LAs with LAMs Only – Kruskal-Wallis Test**

	Conservative	Labour	Liberal Democrat	NOC
<b>Median</b>	0.84	0.87	0.80	0.79
<b>Std. Deviation</b>	0.37	0.54	0.34	0.79
<b>Minimum</b>	0.00	0.09	0.40	0.07
<b>Maximum</b>	1.92	2.85	1.55	5.30
<b>P-value</b>	0.56			

*n=189, (Ball, 2013; BBC, 2008, 2009; City of London, 2014; Council of the Isles of Scilly, 2013a, 2013b; LGFS; Mid Sussex District Council, 2014; Northampton Borough Council, 2014; The Guardian, 2010, 2011, 2012, 2014)*

### **6.2.5 Capital Expenditure**

There is a fairly even divide in how LAs have changed their capital expenditure on museums and heritage, with 34.6% having decreased it and 32.3% having increased it (Table 31).

**Table 31: Change in Capital Expenditure on Museums and Heritage Services between 2008-2009 and 2013-2014**

	Count of LAs	% of LAs
<b>Decrease</b>	122	34.6
<b>No change</b>	117	33.1
<b>Increase</b>	114	32.3

*n=353, (LGFS)*

There is moderate evidence for correlation between capital expenditure on museums and heritage in 2008-2009 and capital expenditure on museums and heritage in 2013-2014 ( $p = 0.62$ ). Both measures vary greatly, as shown in Table 32, but this is to be expected from capital expenditure where there might be a large project one year and then nothing the following year. I conclude that capital expenditure has generally been decreasing.

**Table 32: Capital Expenditure for Museums and Heritage in 2008-2009 and in 2013-2014**

	Capital Expenditure on Museums and Heritage (£000s)	
	2008-2009	2013-2014
<b>Median</b>	15.07	6.00
<b>Minimum</b>	-5154.71	-2995.00
<b>Maximum</b>	24636.42	4145.00

*n=353, (LGFS)*

Compared to change in revenue expenditure, a chi-square test suggests that there is a significant relationship, with 43.9% of LAs having cut revenue expenditure also having cut capital expenditure, and 45.8% of those having increased revenue expenditure having done the same to capital expenditure (Table 33). There appears, then, to be some consistency between how LAs have approached cuts to museums across revenue and capital expenditure.

**Table 33: Relationship between Change in Gross Revenue Expenditure on Museums and Heritage Services and Change in Capital Expenditure on Museums and Heritage Services – Chi-Square Test**

			Change in Capital Expenditure on Museums and Heritage Services		
			Decrease	No Change	Increase
Change in Revenue Expenditure on Museums and Heritage Services	Decrease	Count	83	39	67
		%	43.9	20.6	35.4
	No Change	Count	18	60	14
		%	19.6	65.2	15.2
	Increase	Count	21	18	33
		%	29.2	25	45.8
<b>P-value</b>			<0.001		

*n=353, (LGFS)*

Interestingly, however, when this test is repeated with only LAs with LAMs included the p-value is no longer at the significant level (Table 34). The difference appears to be in the number of LAs that have made no change to either figure, suggesting that the original test was skewed by the number of LAs without LAMs that do not report expenditure on museums and heritage at all. Nonetheless, of LAs that decreased revenue expenditure, slightly more also decreased capital expenditure than increased it. Of LAs that increased revenue expenditure, 53.5% also increased capital expenditure compared to 34.9% that decreased it.

While there is weak evidence for correlation between capital expenditure on museums and heritage in 2008-2009 and capital expenditure on all other services in 2008-2009 ( $\rho = 0.42$ ), at first it appears that there is some consistency in how LAs have made changes to their capital expenditure in these categories. Around 50% of LAs that have decreased their capital expenditure in one category have also decreased it in the other, and nearly 60% have increased both. However, a chi-square test does not produce a significant result, as shown in Table 35.

A similar pattern is seen when comparing museums and heritage to other cultural services. I find evidence for a slightly greater, but still unconvincing, correlation between capital expenditure on museums and heritage and capital expenditure on all

other cultural services in 2008-2009 ( $p = 0.47$ ), and a similar pattern to that shown for all services when looking at the data categorically (Table 36).

**Table 34: Comparison of Change in Gross Revenue Expenditure on Museums and Heritage Services between 2008-2009 and 2013-2014 and Change in Capital Expenditure on Museums and Heritage Services between 2008-2009 and 2013-2014, for LAs with LAMs Only – Chi-Square Test**

			Change in Capital Expenditure on Museums and Heritage Services		
			Decrease	No Change	Increase
Change in Revenue Expenditure on Museums and Heritage Services	Decrease	Count	53	11	49
		%	46.9	9.7	43.4
	No Change	Count	17	6	13
		%	47.2	16.7	36.1
	Increase	Count	15	5	23
		%	34.9	11.6	53.5
P-value			0.46		

*n=189, (LGFS)*

**Table 35: Relationship between Change in Capital Expenditure between 2008-2009 and 2013-2014 on Museums and Heritage Services and Change in Capital Expenditure on All Other Services, for LAs with LAMs Only – Chi-Square Test**

			Change in Capital Expenditure on Museums and Heritage Services		
			Decrease	No Change	Increase
Change in Capital Expenditure on All Services	Decrease	Count	55	16	40
		%	49.5	14.4	36.0
	No Change	Count	7	2	9
		%	38.9	11.1	50.0
	Increase	Count	23	4	36
		%	36.5	6.3	57.1
P-value			0.09		

*n=189, (LGFS)*

**Table 36: Comparison of Change in Capital Expenditure between 2008-2009 and 2013-2014 on All Cultural Services Except Museums and Heritage Services and Museums and Heritage Services, for LAs with LAMs Only – Chi-Square Test**

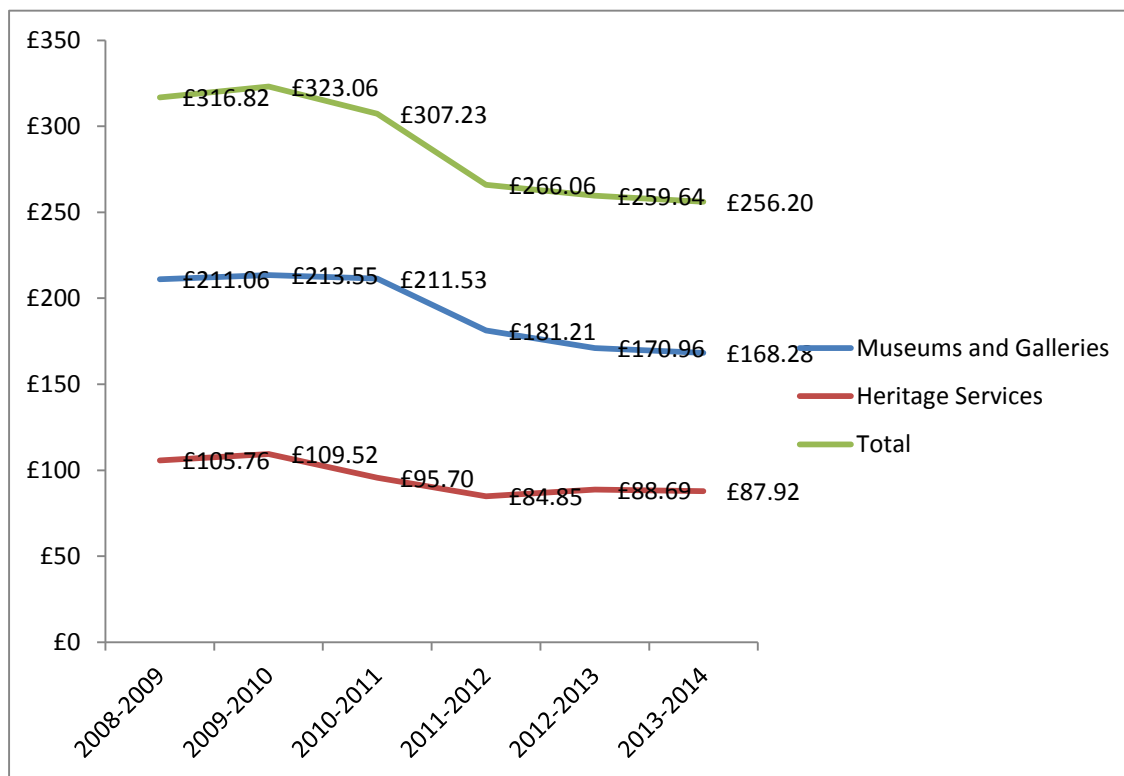
			Change in Capital Expenditure on Museums and Heritage Services		
			Decrease	No Change	Increase
Change in Capital Expenditure on All Cultural Services	Decrease	Count	45	12	38
		%	47.4	12.6	40.0
	No Change	Count	9	1	7
		%	52.9	5.9	41.2
	Increase	Count	31	9	40
		%	38.8	11.3	50.00
<b>P-value</b>			0.62		

*n=189, (LGFS)*

### **6.2.6 Income**

Another measure provided in the government publications is LA income from museums and heritage services. Over time income from museums has declined, and was around 19% lower in 2013-2014 than in 2008-2009 (Figure 16).

**Figure 14: Average Income from Museums and Heritage Services (£000s)**



(LGFS)

One can compare income from museums to expenditure on museums. By calculating income as a proportion of expenditure, I find that most LAs make only a small proportion of their museums expenditure back. In 2008-2009, the average income from museums and heritage services was just 14.57% of revenue expenditure. Three LAs, however, do report a higher income from museums than their revenue expenditure. In 2008-2009, the London Borough of Hounslow spent £76,000 and earned £78,000, South Kesteven District Council spent £28,000 and earned £31,000 and Bath and North East Somerset Council spent £8,485,000 and earned £11,709,000, which is a profit of 38%. However, Bath and North East Somerset Council is the only instance where this income is reported as being from ‘sales, fees and charges’ (e.g. directly from museum operations) rather than being ‘other income’, which can include income related to joint arrangements for example. Bath, therefore, is an exceptional case due to the profitability of the Roman Baths.

Hypothetically, there are a couple of different scenarios that one might expect:

- That LAs with a more favourable proportion of income to expenditure, such as the three described above, may have maintained their expenditure to a higher



degree during the economic crisis, due to their appearance of being a good investment;

- That LAs with higher income from museums and heritage may have decreased their expenditure to a higher degree due to the services appearing capable of sustaining themselves through earned income.

Neither scenario is supported with statistical evidence. While comparing the medians of the income variable appears to show that LAs that recoup a higher proportion of their expenditure through income have more commonly increased their revenue expenditure and LAs that recoup a lower proportion of their expenditure through income have more commonly decreased their revenue expenditure, this result is not statistically significant (Table 37).

**Table 37: Relationship between Change in Gross Revenue Expenditure on Museums and Heritage Services and Income from Museums and Heritage Services as a Proportion of Expenditure in 2008-2009, LAs with LAMs Only – Kruskal-Wallis Test**

<b>Change in gross revenue expenditure on museums and heritage</b>	<b>Income from museums and heritage in 2008-2009 as a proportion of total expenditure in 2008-2009</b>	
<b>Decrease</b>	<b>Median</b>	13.25
	<b>Minimum</b>	0
	<b>Maximum</b>	66.13
<b>No Change</b>	<b>Median</b>	15.38
	<b>Minimum</b>	0
	<b>Maximum</b>	138.00
<b>Increase</b>	<b>Median</b>	17.58
	<b>Minimum</b>	0
	<b>Maximum</b>	102.63
<b>P-value</b>		0.70

*n=189, (LGFS)*

Looking at change in income from museums and heritage, one sees that around 50% of LAs have seen their income decline (Table 38). This is of interest as increasing

earned income is one strategy reported by museums in coping with cuts in public funding (Evans, 2012: 12, 2013: 16, Museums Association, 2014: 16, 2015: 11). However, nearly 40% of LAs have seen their income increase.

**Table 38: Change in Income from Museums and Heritage Services between 2008-2009 and 2013-2014, LAs with LAMs Only**

	Frequency	Percent
<b>Decrease</b>	95	49.5
<b>No Change</b>	23	12.0
<b>Increase</b>	74	38.5

*n=189, (LGFS)*

The average figures show a mixed picture, with the mean and median differing greatly. As the data is non-normally distributed it is more appropriate to look at the median, which shows a slight increase in average income from £101,000 to £107,000 between 2008-2009 and 2013-2014 (Table 39).

**Table 39: Income from Museums and Heritage in 2008-2009 and 2013-2014, LAs with LAMs Only**

	2008-2009	2013-2014
<b>Mean</b>	500.02	431.78
<b>Median</b>	101.43	107.50
<b>Std. Deviation</b>	1386.49	1337.11
<b>Minimum</b>	0.00	0.00
<b>Maximum</b>	13572.40	16243.00

*n=189, (LGFS)*

LAs that have reduced their revenue expenditure on museums and heritage have most commonly also seen their income decrease from museums and heritage, whereas those that have increased their revenue expenditure experienced increases in income. A chi-square test suggests that this is a statistically significant effect (Table 40). This suggests that LAMs need to spend money in order to earn money, making mitigating public spending cuts by increasing other sources of income challenging.

**Table 40: Change in Gross Revenue Expenditure on Museums and Heritage Services and Change in Income from Museums and Heritage Services between 2008-2009 and 2013-2014, LAs with LAMs Only – Chi-Square Test**

			Change in Income from Museums and Heritage Services		
			Decrease	No Change	Increase
<b>Change in Revenue Expenditure on Museums and Heritage Services</b>	<b>Decrease</b>	<b>Count</b>	72	14	27
		<b>%</b>	63.7	12.4	23.9
	<b>No Change</b>	<b>Count</b>	14	6	16
		<b>%</b>	38.9	16.7	44.4
	<b>Increase</b>	<b>Count</b>	9	3	31
		<b>%</b>	20.9	7.0	72.1
<b>P-value</b>			<0.001		

*n*=189, (LGFS)

## 6.3 The Impact of Austerity on Governance

### 6.3.1 Overview

By 2015, 20 LAMs had closed (4.39% of the 2008 museums), but 8 new LAMs were found to have opened, one of which was in collaboration with a Trust. Fifty-seven (57) LAMs had been devolved to charitable Trusts<sup>5</sup> (12.50% of the 2008 museums), with the LA retaining governance by acting as a trustee in 48 cases, and the LA appearing to release the museum entirely in 10 cases. One museum was transferred to a university. This was an overall decrease in LAMs, as defined previously, of 71. A summary of this information is presented in Table 41 and illustrated in Figure 17.

<sup>5</sup> *Babbidge defines Museum Trusts as ‘[...] charitable bodies (‘museum trusts’) specially created to deliver a local authority’s museums services, with the intention of a long-term relationship between the council and the museum trust [...] all the council’s museum responsibilities (including strategic planning) are transferred, not only day-to-day management responsibilities; and [...] there is a sharing of risk between the council and the museum trust.’ (Babbidge et al., 2006: 1)*

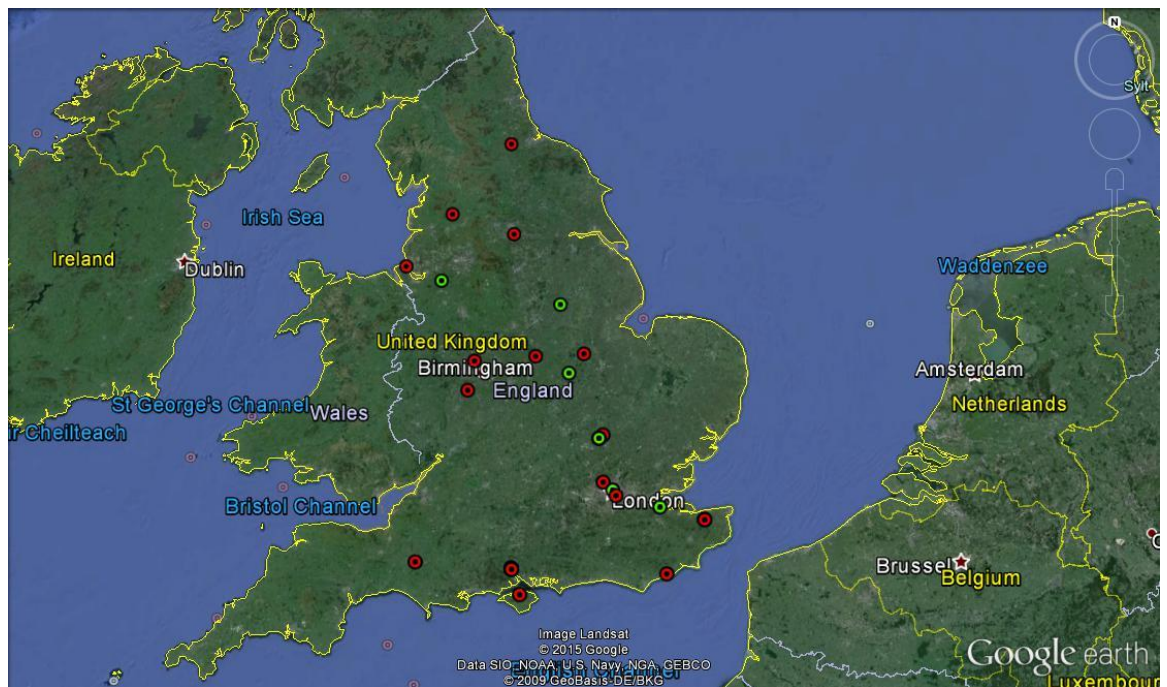
**Table 41: Comparison of Museum Types in 2008 and 2015**

<b>Museum Type</b>	<b>Museums in 2008</b> Count (% of LAMs)	<b>Number of Museums in 2015</b> Count (% of LAMs)
Joint Local Authority Museum	36 (7.89)	31 (8.05)
Joint Local Authority with Collaborator	1 (0.22)	1 (0.26)
Local Authority Museum	391 (85.75)	325 (84.42)
Local Authority with Collaborator	28 (6.14)	28 (7.27)
Charitable Trust with Local Authority as Trustee	N/A*	48
Charitable Trust without Local Authority as Trustee	N/A*	10
University Museum	N/A*	1
Total Local Authority Museums^	456	385

\* Though museums of this type existed in 2008, they are not included in this study ^sum of Local Authority Museums, Local Authority with Other Organisation, Local Authority with Charitable Trust

(Museums Association, n.d.)

**Figure 15: Closed LAMs and New LAMs as of 2015**



*Red - Closed Local Authority Museums; Green - Newly Opened Local Authority Museums*

*(Museums Association, n.d.)*

Table 42 details the different routes taken by LAMs between 2008 and 2015 and shows that 79.96% of LAMs saw no change in their governance and management status. Of those that saw a change, the most common route was a LAM becoming a Trust with a Local Authority Trustee (54.12% of those changing).

**Table 42: Changes in Museum Types between 2008 and 2015**

Status in 2008	Status in 2015	Count	%
Joint Local Authority Museum	Joint Local Authority Museum	31	6.68%
Joint Local Authority Museum	Local Authority Museum	4	0.86%
Joint Local Authority Museum	Trust with Local Authority trustee	1	0.22%
Joint Local Authority with Collaborator	Joint Local Authority with Collaborator	1	0.22%
Local Authority Museum	Local Authority Museum	314	67.67%
Local Authority Museum	Local Authority with Collaborator	2	0.43%
Local Authority Museum	N/A	19	4.09%
Local Authority Museum	Trust Museum	9	1.94%
Local Authority Museum	Trust with Local Authority trustee	46	9.91%
Local Authority Museum	University Museum	1	0.22%
Local Authority with Collaborator	Local Authority with Collaborator	25	5.39%
Local Authority with Collaborator	Closed	1	0.22%
Local Authority with Collaborator	Trust Museum	1	0.22%
Local Authority with Collaborator	Trust with Local Authority trustee	1	0.22%
Not yet established	Local Authority Museum	7	1.51%
Not yet established	Local Authority with Collaborator	1	0.22%

(Museums Association, n.d.)

LAs with only one museum were least likely to make governance changes, with only 17.58% doing so compared to 37.14% of LAs with two museums and 34.92% of those with 3 or more. A chi-square test produced a p-value of 0.019, suggesting that this pattern did not appear by chance and that number of museums did have an effect on whether an LA chose to make governance changes. This is shown in Table 43.

**Table 43: LAs that have made Governance or Management Changes to their LAMs, by Number of LAMs in 2008, for LAs with LAMs Only – Chi-Square Test**

		Number of Museums in 2008		
		One	Two	Three or More
<b>Changes not made</b>	<b>Count</b>	75	22	41
	<b>%</b>	82.42%	62.86%	65.08%
<b>Changes made</b>	<b>Count</b>	16	13	22
	<b>%</b>	17.58%	37.14%	34.92%
<b>P-value</b>		0.019		

*n=189, (Museums Association, n.d.)*

There was, however, no apparent relationship between change in governance and whether the LA managed museums in collaboration with other organisations, as shown in Table 44.

**Table 44: LAs that have made Governance or Management Changes to their LAMs, for LAs with LAMS Only, by Collaborations in 2008 – Chi-Square Test**

		Collaborations in 2008	
		No	Yes
<b>Changes not made</b>	<b>Count</b>	108	30
	<b>%</b>	74.48%	68.18%
<b>Changes made</b>	<b>Count</b>	37	14
	<b>%</b>	25.52%	31.82%
<b>P-value</b>		0.41	

*n=189, (Museums Association, n.d.)*

There was also no apparent relationship between change in governance and change in revenue expenditure, as shown in Table 45. Whether the LA decreased, increased or did not change their expenditure on museums and heritage, around 70% did not make governance changes and 25-30% did. This is further explored in Table 46, where very little difference is apparent in the median change ratio for revenue expenditure. The p-value of 1.00 suggests that the pattern observed is likely to have occurred by chance, with whether or not the LA made governance changes not having had an impact. One might have expected LAs that did make governance changes to have done so with the

aim of reducing their expenditure and so it is interesting that this does not seem to be the case, at least in the short term.

**Table 45: Relationship between Change in Governance and Change in Gross Revenue Expenditure on Museums and Heritage Services between 2008-2009 and 2013-2014, LAs with LAMs Only – Chi-Square Test**

		Change in Revenue Expenditure		
		Decrease	No Change	Increase
<b>Changes not made</b>	<b>Count</b>	83	25	30
	<b>%</b>	74.77%	69.44%	71.43%
<b>Changes made</b>	<b>Count</b>	28	11	12
	<b>%</b>	25.23%	30.56%	28.57%
<b>P-value</b>		0.794		

*n=189, (LGFS; Museums Association, n.d.)*

**Table 46: Relationship between Change in Governance and Change in Gross Revenue Expenditure on Museums and Heritage between 2008-2009 and 2013-2014, LAs with LAMs Only – Kruskal-Wallis Test**

	<b>Changes not made</b>	<b>Changes made</b>
<b>Mean</b>	0.91	0.98
<b>Median</b>	0.84	0.88
<b>Std. Deviation</b>	0.42	0.75
<b>Minimum</b>	0.00	0.16
<b>Maximum</b>	2.85	5.30
<b>P-value</b>	1.00	

*n=189, (LGFS; Museums Association, n.d.)*

### **6.3.2 By Region**

By region, the South East has suffered the greatest decline in LAMs, with 24 museums (29.27%) either closing or transferring away from LAs (Table 47). The West Midlands have also seen a large drop, with 12 (21.43%) fewer LAMs in 2015 than in 2008. The North East saw the smallest decline, losing just 2 (7.41%) LAMs. This matches with earlier observations about the relative importance of LAMs in this region.



However, in testing the relationship between region and change in governance statistically no significant difference was found in the likelihood that an LA in a particular region would have made governance changes or would have devolved LAMs to Trust status. This is shown in Table 48 and Table 49.

**Table 47: Changes in Governance and Management of LAMs between 2008 and 2015, by Region**

Local Authority Region	LAs that have made Changes		LAs that have Devolved LAMs to Trust		LAMs in 2008	LAMs Closed		LAMs Devolved from LA		New LAMs
	Count	%	Count	%	Count	Count	%	Count	%	Count
East	4	7.69	3	5.77	50	2	4.00	3	6.00	1
East Midlands	6	13.33	2	4.44	50	3	6.00	5	10.00	2
London	8	24.24	3	9.09	27	2	7.41	3	11.11	1
North East	3	25.00	0	0.00	27	1	3.70	1	3.70	0
North West	7	17.07	4	9.76	56	1	1.79	4	7.14	1
South East	11	14.86	5	6.76	82	6	7.32	18	21.95	3
South West	5	12.20	3	7.32	45	1	2.22	7	15.56	0
West Midlands	7	21.21	3	9.09	56	2	3.57	10	17.86	0
Yorkshire and Humber	4	18.18	2	9.09	63	1	1.59	6	9.54	0

*(LGFS; Museums Association, n.d.)*

**Table 48: LAs that have made Governance or Management Changes to their LAMs, by LA Region – Logistic Regression**

	Odds ratio	95% Confidence Interval	
		Lower	Upper
<b>Yorkshire and Humber</b>	N/A		
<b>East</b>	0.79	0.18	3.46
<b>East Midlands</b>	0.54	0.10	2.94
<b>London</b>	1.07	0.24	4.82
<b>North East</b>	0.56	0.08	3.80
<b>North West</b>	0.65	0.15	2.83
<b>South East</b>	1.10	0.28	4.28
<b>South West</b>	0.71	0.14	3.56
<b>West Midlands</b>	1.17	0.27	5.05
<b>P-value</b>	0.96		

*n=189, (LGFS; Museums Association, n.d.)*

**Table 49: LAs that have Devolved LAMs to Trusts, by LA Region – Logistic Regression**

	Odds ratio	95% confidence interval	
		Lower	Upper
<b>Yorkshire and Humber</b>	N/A		
<b>East</b>	1.13	0.09	13.70
<b>East Midlands</b>	1.73	0.14	21.39
<b>London</b>	2.29	0.21	24.68
<b>North East</b>	0.00	0.00	
<b>North West</b>	1.50	0.14	15.87
<b>South East</b>	2.10	0.22	19.75
<b>South West</b>	2.60	0.24	28.15
<b>West Midlands</b>	2.05	0.19	21.97
<b>P-value</b>	0.83		

*n=189, (LGFS; Museums Association, n.d.)*

### **6.3.3 By Class of LA**

By class of LA, one sees that Shire Counties have made the most changes, with a third of Shire Counties having made changes to the management and/or governance of their LAMs (Table 50). They have also lost the highest proportion of their LAMs, either closing or devolving around a third. The greatest changes in LAMs, then, appear to have taken place within this class of LA.

Shire Districts, on the other hand, have made the fewest changes, with only 7.96% of this class of LA making management and/or governance changes, and only 13.44% of Shire District LAMs being devolved or closed. Again, Shire Districts have also cut the least from their revenue expenditure on museums which suggests that LAMs in this class of LA have seen the most stability.

While logistic regression analysis does not confirm these interpretations (Table 51), there is strong evidence that Shire Counties were more likely than Unitary Authorities to devolve LAMs to Trust status: Table 52 shows that the odds ratio of a Shire County LA devolving LAMs to Trust status is 5.54 compared to Unitary Authorities, with

confidence intervals both above the no effect value. The regression model is statistically significant with a p-value of 0.006.

I showed in Section 6.1.3 that Shire Counties tend to have large museum services that they commonly run in collaboration with other organisations. I also showed that Shire Counties have cut the most from the revenue expenditure on museums and heritage. This evidence that Shire Counties have also made more governance changes, in particular devolving LAMs to Trust, is of particular interest.

**Table 50: Changes in Governance and Management of LAMs between 2008 and 2015, by Class of LA**

Local Authority Class	LAs that have made Changes		LAs that have Devolved LAMs to Trust		LAMs in 2008	LAMs Closed		LAMs Transferred		New LAMs
	Count	%	Count	%	Count	Count	%	Count	%	Count
Shire District	16	7.96	6	2.99	119	8	6.72	8	6.72	3
London Borough	8	24.24	3	9.09	26	3	11.54	3	11.54	1
Unitary Authority	14	25.00	6	10.71	135	4	2.96	17	12.59	4
Shire County	9	33.33	7	25.93	72	2	2.78	22	30.56	0
Metropolitan District	8	22.22	3	8.33	104	3	2.88	9	8.65	0

*(LGFS; Museums Association, n.d.)*

**Table 51 LAs that have made Governance or Management Changes to their LAMs, by LA Class – Logistic Regression**

	Odds ratio	95% confidence interval	
		Lower	Upper
<b>Unitary Authority</b>	N/A		
<b>London Borough</b>	1.15	0.8	3.52
<b>Metropolitan District</b>	0.71	0.25	2.07
<b>Shire County</b>	3.21	0.96	10.80
<b>Shire District</b>	0.44	0.19	1.04
<b>P-value</b>	0.016		

*n=189, (LGFS; Museums Association, n.d.)*

**Table 52: LAs that have Devolved LAMs to Trusts, by LA Class – Logistic Regression**

	Odds ratio	95% confidence interval	
		Lower	Upper
<b>Unitary Authority</b>	N/A		
<b>London Borough</b>	1.12	0.25	5.01
<b>Metropolitan District</b>	0.49	0.09	2.60
<b>Shire County</b>	5.54	1.47	20.96
<b>Shire District</b>	0.50	0.15	1.66
<b>P-value</b>	0.006		

*n=189, (LGFS; Museums Association, n.d.)*

## 6.4 Discussion

### 6.4.1 Limitations

As described in Section 5.3.2, this analysis has a number of limitations. Namely:

- It represents a snapshot of a specific point in time, whereas LAMs are constantly changing. Since the survey of LAMs was undertaken in March 2015 more LAMs have closed or otherwise changed status. If the study was undertaken using different time points the results may have been different.

- There are different ways to define a local authority museum. The definition used in this study meant that some museums were excluded that might have arguably been included. If a different definition was used then the results may have been different.
- There are different ways to define a museum. This study used the MA database as a starting point for identifying LAMs and did not attempt to define museum beyond those included in that resource. Some organisations that were included might be better categorised as historic buildings, visitor centres, or art galleries and might have been excluded if using stricter criteria. Again, this may have given different results.
- The list of included LAMs was compiled one by one by a single person. Mistakes and errors in judgement are possible that may have affected the results.
- The financial data available for all LAs in England was difficult to use, as described in Section 5.3.2.

An important conclusion, therefore, is that this study demonstrates the difficulty of understanding the nature of the museum sector. That is not to say that this exercise was futile, as I have explored the available data and how it can be used and highlighted the difficulties. It does mean, however, that one must be cautious in our interpretation of the results and realistic about the level of certainty with which one can state conclusions.

### ***6.4.2 Summary of findings***

This stage of the study used a population of 353 LAs, of which 189 (54%) were responsible for 456 LAMs in January 2008. The revenue and capital reported by LAs for museums and heritage services in 2008-2009 varied widely, though LAs with LAMs spent considerably more than those without and expenditure was also related to the number of LAMs the LA had. Interestingly, expenditure on museums and heritage was only moderately correlated with expenditure on other services. This gives weight to the ‘historical accident and tradition’ argument for the distribution of museums (Boylan, 2006: 211): to some extent, modern LAs have inherited the cost of museums rather than planning their expenditure around their resources.

By March 2015, 20 LAMs had closed and 57 had been devolved to charitable Trusts. There was an overall decline of 71 LAMs. LAs with more than one museum were more



likely to make changes to their LAMs. This may be because they could devolve or close one museum while retaining another, therefore not losing the entire service.

In looking at the financial impact of austerity, I found that museums and heritage services have incurred greater cuts overall than other LA services. However, I found evidence that the strategy for cuts to museums and heritage services has been different to the strategy for cuts overall. In fact, museums and heritage services have more commonly seen an increase in expenditure than other LA services. However, there is no relationship between change in governance and change in expenditure: LAs that devolved their museums to Trusts have not yet benefited from significant financial savings. This will be explored further through the case studies.

Looking regionally, in 2008, the Midlands and Northern regions appear to be more reliant on LAs for supply of museums than the South and East. LAs in the North East and in Yorkshire and Humber spend the most on museums and have the highest number of LAMs per person. This suggests that museums are more important to LAs in these areas than in the South and East. Financially, LAs in the North have weathered the greatest reduction in spending power, but while LAs in the North East have cut spending on museums and heritage services by 30%, LAs in the North West have a below-average cut. However, LAs in the North East have closed or devolved the fewest LAMs, suggesting that they are attempting to retain museums in the face of severe cuts. In keeping with the findings from 2008, the Eastern region has the lowest reduction in spending power and yet has cut museums and heritage services the most. This suggests that LAMS are of low importance in this region.

Looking at LAs by class, Unitary Authorities were the most likely to have LAMs, likely due to having inherited them from the groups of smaller LAs they replaced. Metropolitan Districts also commonly had LAMs, whereas only 40% of Shire Districts did. Shire Districts usually had just one LAM and spent the least, in keeping with the scale of this LA class. While Metropolitan Districts commonly had more than one museum, they generally managed them alone rather than in collaboration with other LAs or other organisations, whereas Shire Counties appeared to have the most complex LAMs, often managing more than one, often doing so with collaborators, and spending the most.

Interestingly, looking at the financial data over time, Shire Counties have the lowest reduction in spending power but have cut the most from the museums and heritage services expenditure. It may be that having more complex services makes it easier to find efficiencies and therefore make cuts. Further, Shire Counties have made the most

changes to the structure of the museum services, closing or devolving around a third of their 2008 LAMs. Overall, the greatest changes have happened in this LA class. In comparison, Shire Districts with their small and simply structured museums services have cut and changed the least. In terms of expenditure, this may be because they have been unable to find easy savings in their already small scale operations, and in terms of governance this may be because closing or devolving one museum meant the loss of their entire service, in comparison to Shire Counties that could close one museum and retain another.

No other LA characteristics were found to have an effect on how cuts were made to services. Unemployment rate was used as an indicator of the economic prosperity of each LA but there was no correlation. The political affiliation of the LA did not appear to be associated with cuts either.

Finally, in looking at income from museum and heritage services, I found that LAs recoup very little of their expenditure in income and there is no statistical evidence that LAMs with higher income in 2008-2009 have seen lesser public funding cuts. Around half of LAs have seen their income from museum and heritage services decline since 2008, and a drop in income is associated with drop in LA expenditure. However, around 40% of LAs have increased their income and increased income is associated with increased expenditure, suggesting that LAMs need to spend in order to generate earned income. In fact, the median income in 2013-2014 is higher than in 2008-2009. I will explore this in more detail through our case studies.

### **6.4.3 Sampling**

An objective of this phase of the study was to enable the construction of a sampling strategy so that a selection of case studies can be identified for more detailed and qualitative analysis. As described above, the analysis identified characteristics of interest and therefore guidelines for the construction of a sampling strategy. The characteristics are described below and the sampling strategy using them was described in Section 5.3.3.

Firstly, while not all results were statistically significant, they indicate that different types of LA have different arrangements of LAMs and have dealt with austerity differently. This suggests that it would be worth including examples from each type in the sample for more detailed study.

I also showed that there may be differences based on the size and complexity of the museums service, with larger services making more changes to their structure, for

example. As such, it will be interesting to look in more detail at museum services of different sizes and formats.

Of interest is the lack of relationship between governance change, such as devolution to Trust, and reduced expenditure. It would be worthwhile finding out more about the intended and realised benefits of these changes and therefore the sample should include some LAs that have made changes.

Finally, I have shown that expenditure on museums and heritage varies widely and that 72 LAs have actually increased expenditure since 2008-2009. It would be interesting to find out more about the rationale for increasing expenditure in comparison to LAs that have made cuts. I can divide the LAs into quartiles based on change in expenditure and include examples from each quartile in the sample.

#### **6.4.4 Next Steps**

After using this analysis to construct a sampling strategy and selecting the sample, I continued with my study by sourcing organisational documentation for each case and then conducting interviews with staff. As described in Section 5.3.5, I thematically analysed the documentation and the interview transcripts. The following chapters cover the findings of this analysis.

## 7 Situation and Impact

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In this chapter I begin to present findings of the data collected in Phases Two and Three of the study. While I provide points for discussion in themselves, I also establish a foundation for the analysis in the following chapters by introducing the case studies.

I first present a brief overview of each case study and then analyse available financial information for each about cuts in LA expenditure. I then summarise key points about the nature of austerity for LAMs, noting that the wider public funding climate has contributed to the challenges facing them. Finally, I look at some impacts of cuts as a starting point to understanding the situation and evaluating methods for coping with it.

### 7.1 Overview of Case Studies

In this section I present a short overview of each LA case study. This is intended to introduce them in readiness for analysis but is brief to avoid duplication. I list the LAMs managed by each case study LA and describe key changes in governance arrangements.

#### ***7.1.1 Bath and North East Somerset Council***

Museums for Bath and North East Somerset Council, a Unitary Authority in the South West, are run by Bath Heritage Services, an internal business unit. The service comprises the Roman Baths and Pump Room, the Fashion Museum and the Victoria Art Gallery. The service also manages the record office and some historic buildings. In 2014-2015 the service had a gross expenditure of around £12m.

The Roman Baths contains the remains of the bath house and interpretive galleries, and had over a million visitors in 2015 (Visit Britain, 2015). The galleries were refurbished in 2011. The Fashion Museum was founded in 1963 and houses a collection of historic and modern clothing. It had just under 91k visitors in 2015 (Visit Britain, 2015). The Victoria Art Gallery displays the council's collection of paintings, sculpture and decorative arts and had 130k visitors in 2015 (Visit Britain, 2015).

#### ***7.1.2 Birmingham City Council***

Birmingham City Council is a Metropolitan District Council in the West Midlands, and is the largest local authority in the country. Birmingham Museums Trust was established in 2012 and merged the museums and historic properties run by the council with the Thinktank Trust, previously subsidised by the council. In 2014-2015 the Trust had a gross expenditure of around £12m (Birmingham Museums Trust, 2015).

The Trust's flagship venue is Birmingham Museum and Art Gallery. Established in 1885, it houses mixed collections from art to archaeology, and had just over 900k visitors in 2015 (Visit Britain, 2015). The other venues within the trust are:

- Thinktank. A science museum with 260k visitors in 2015 (Visit Britain, 2015)
- Aston Hall. A seventeenth century mansion and public park. It did not report visitor numbers in 2015, but had just under 40k in 2014 (Visit Britain, 2015).
- Blakesley Hall. A Tudor house with almost 20k visitors in 2015 (Visit Britain, 2015)
- The Museum of the Jewellery Quarter. A preserved jewellery workshop and history of Birmingham's jewellery industry, with around 25k visitors in 2015 (Visit Britain, 2015).
- Sarehole Mill. An operational eighteenth century mill, with nearly 23k visitors in 2015 (Visit Britain, 2015).
- Soho House. A Georgian home associated with an eighteenth century industrialist, with 12k visitors in 2015 (Visit Britain, 2015).
- Weoley Castle. A ruined fortified manor house, a scheduled ancient monument, usually inaccessible except from a viewing platform, reporting 5k visitors in 2015 (Visit Britain, 2015).

### ***7.1.3 Blackpool Borough Council***

Blackpool Borough Council, a Unitary Authority in the North West, runs The Grundy Art Gallery. The art gallery had gross expenditure of £225k in 2014-2015 but does not report overall visitor numbers to Visit Britain (Blackpool Council FOI response, 2017).

The council is working to open a Blackpool Museum in 2020. It will have a social history theme and the project has Heritage Lottery funding.

### ***7.1.4 Cambridgeshire County Council***

Cambridgeshire County Council, a Shire County in the East, ran the Cromwell Museum, a small building in Huntingdon housing collections related to Oliver Cromwell, until 2016. The Cromwell Museum Trust took over the museum in 2016 and receives no funding from the Council. Huntingdon Town Council took over responsibility for the museum building and Cambridgeshire County Council retained ownership of the collections. The most recent visitor number reported for the museum was just under 10k in 2014, from gross expenditure of £38k (Visit Britain, 2015).

### ***7.1.5 Dartford Borough Council***

Dartford Borough Council, a Shire District in the South East, runs Dartford Borough Museum. The museum is based in the same building as the library and covers the history of the borough. It had gross expenditure of just under £50k in 2014-2015 and had just over 4k visitors (Dartford Borough Council FOI Response, 2017; Visit Britain, 2015).

### ***7.1.6 Doncaster Metropolitan Borough Council***

Doncaster Metropolitan Borough Council is a Metropolitan District in Yorkshire and Humber. It runs two museums, Doncaster Museum and Art Gallery and Cusworth Hall Museum and Park. The former opened in 1964 and houses collections ranging from natural history to fine art, and the latter is a historic house with social history exhibits and extensive grounds. The two venues spent £1.7m gross in 2014-2015 (Doncaster Metropolitan Borough Council FOI Response, 2017).

### ***7.1.7 Elmbridge Borough Council***

Elmbridge Borough Council is a Shire District in the South East. It ran Elmbridge Museum until 2014 when the museum was closed and the staff moved to wider council offices to deliver an outreach-only museums service. They also worked to reduce the collections to only items related to the district. The outreach-only service cost around £315k in 2014-2015 (Elmbridge Borough Council FOI Response, 2017). The most recent visitor number reported is just under 7k from 2009 (Visit Britain, 2011).

### ***7.1.8 Epping Forest District Council***

Epping Forest District Council is a Shire District in the East of England. The museum, in Waltham Abbey, has a local history theme. It was refurbished following an HLF grant and reopened in 2016. The most recent visitor number reported was 15k in 2011 when gross expenditure on the museum was £410k (Epping Forest District Council FOI Response, 2017; Visit Britain, 2015).

### ***7.1.9 Ipswich Borough Council***

Colchester and Ipswich Museums Service (CIMS) was formed in 2007 by Ipswich Borough Council and Colchester Borough Council, both Shire Districts in the east. Colchester Borough Council is the lead council, employing the service's staff. The service had a gross expenditure of close to £3m in 2014-2015 (Colchester Borough

Council FOI response, 2017). Both councils brought museums to the agreement and jointly run:

- Colchester Castle, a Norman Castle in Colchester containing archaeological and historical exhibits. The castle was refurbished in 2013 and 2014, reporting close to 100k visitors prior to closure (Visit Britain, 2015).
- The Hollytrees Museum, a Georgian building in Colchester with domestic displays, most recently reporting 34k visitors in 2011 (Visit Britain, 2015).
- The Natural History Museum in Colchester, most recently reporting 27k visitors in 2015.
- Ipswich Museum and Gallery tells the history of Ipswich and includes natural history and archaeological collections. It had 45k visitors in 2015 (Visit Britain, 2015).
- Christchurch Mansion, a Tudor mansion in Ipswich. It had 60k visitors in 2015 (Visit Britain, 2015).

Financial information, organisational documentation, and interviews refer to the joint service as a whole rather than the role of Ipswich Borough Council alone.

### **7.1.10 Leicester City Council**

Leicester City Council, a Unitary Authority in the East Midlands, was formed in 1997. Leicester Arts and Museums Service had a gross expenditure of over £3m in 2014-2015 (Leicester City Council FOI Response, 2017) and comprised the following museums and historic properties:

- New Walk Museum and Art Gallery, a city centre museum with natural history, archaeology, and art galleries. It had 192k visitors in 2015 (Visit Britain, 2015).
- The Guildhall, a historic building housing medieval galleries and an entertainment venue. It had close to 80k visitors in 2015 (Visit Britain, 2015).
- Jewry Wall, Roman ruins with Roman archaeological displays. It had close to 30k visitors in 2015 (Visit Britain, 2015).
- Newarke Houses Museum and Gardens, comprises two historic properties housing social history exhibits, and had 45k visitors in 2015 (Visit Britain, 2015)
- Abbey Pumping Station houses a museum of science and technology and had 48k visitors in 2015 (Visit Britain, 2015)

- Belgrave Hall and Gardens had 11k visitors in 2015 (Visit Britain, 2015). It became a museum in the 1930s and was converted to a historic house interior in 2012. At this time, it began to only open periodically and for special events.

The service also covers heritage sites, city centre heritage interpretation, city festivals and events, parks, performing arts, arts development, public art.

### **7.1.11 *London Borough of Hackney***

In East London, Hackney museum displays local social history and archaeology. It has a focus on community outreach and spent £484k in 2014-2015 (Hackney Council FOI Response, 2017).

### **7.1.12 *London Borough of Waltham Forest***

In East London, Waltham Forest Council runs the William Morris Gallery and Vestry House Museum and spent £1m in 2014-2015 including capital expenditure (Waltham Forest Council FOI Response, 2017). The former venue is focused on decorative art and social history in relation to William Morris, originally founded in 1950, it was extensively refurbished in 2011-2012. Vestry House Museum opened in 1931 and focuses on local history. Prior to refurbishment, The William Morris Gallery reported 28k visitors in 2010-2011, compared to 127k in 2013-2014, a year after reopening. In comparison Vestry House Museum reported 24k in 2010-2011 and 23k in 2013-2014 (Waltham Forest Council, 2012a, 2015b).

### **7.1.13 *Newcastle City Council***

Newcastle City Council, a Metropolitan District in the North East, is a client of Tyne and Wear Archives and Museums (TWAM) alongside the Metropolitan Borough Councils of South Tyneside, North Tyneside, Sunderland, and Gateshead, and Newcastle University. TWAM used to run museums for Sunderland City Council, but the LA withdrew from the service in 2013, stating that their aim was to achieve efficiencies while protecting frontline services. TWAM continues to run archives and provide other services to Sunderland City Council.

TWAM spent £10.4m gross in 2014-2015 (Tyne & Wear Archives & Museums 2015) and managed the following venues:

- Arbeia Roman Fort and Museum in South Shields, a partially reconstructed Roman fort, attracting 32k visitors in 2015 (Visit Britain, 2015).



- The Discovery Museum in Newcastle. In existence in some form since 1934, the museum focuses on the maritime and industrial history of Newcastle and Tyneside. It had 410k visitors in 2015 (Visit Britain, 2015).
- The Great North Museum: Hancock, has displays of natural history, world history, and archaeology. It reported 480k visitors in 2015 (Visit Britain, 2015).
- The Hatton Gallery in Newcastle focuses on fine art and reported 30k visitors in 2015 fine
- The Laing Art Gallery in Newcastle also focuses on fine art and reported 230k visitors in 2015
- Segedunum Roman Fort in Newcastle, is a Roman ruin and associated museums. It had 50k visitors in 2015 (Visit Britain, 2015).
- The Shipley Art Gallery in Gateshead specialises in decorative arts and crafts. It had 28k visitors in 2015 (Visit Britain, 2015).
- South Shields Museum & Art Gallery originally opened in 1876. It displays local social history and archaeology, and some fine art. It reported 125k visitors in 2015 (Visit Britain, 2015).
- The Stephenson Railway Museum in North Shields displays a range of locomotives from over time. It had 45k visitors in 2015 (Visit Britain, 2015).

Financial information, organisational documentation, and interviews refer to the joint service as a whole rather than the role of Newcastle City Council alone.

#### **7.1.14 Nottingham City Council**

Nottingham City Council is a Unitary Authority in the East Midlands. Through Nottingham Heritage, it runs 4 venues and supports others.

- Nottingham Castle. Housed in a 17th century mansion built on the site of the medieval castle, Nottingham Castle was first opened as a museum and art gallery in 1875. The castle was due to close in 2018 for a HLF funded redevelopment project. It reported 220k visitors in 2015 (Visit Britain, 2015).
- Wollaton Hall and Park. A historic building and parklands, with the interior including natural history exhibits, Wollaton Hall reported 80k visitors in 2015 (Visit Britain, 2015).
- The Museum of Nottingham Life at Brewhouse Yard. A social history museum also due to close in 2018 as part of the castle redevelopment

project, Most recently, the museum reported 33k visitors in 2011 (Visit Britain, 2015).

- Newstead Abbey Historic House and Gardens, which reported 100k visitors in 2015 (Visit Britain, 2015).

Additionally, the council closed Nottingham Industrial Museum in 2009, but it reopened as a charity run by volunteers. They handed over day-to-day management of Green's Windmill and Science Centre in 2012 to the Green's Windmill Trust, which had been established to provide additional support a few years previously, The Windmill reported 24k visitors in 2015 (Visit Britain, 2015).

### **7.1.15      *St Albans City and District Council***

St Albans is a Shire District in the East of England. It spent 500k on its two museums in 2014-2015, including capital expenditure.

The Museum of St Albans closed in 2015 and reopened in a new venue in June 2018. The new museum has a wide range of collections including local history and archaeology, world history, and fine art. Verulamium Museum, next to extensive Roman ruins, focuses on Roman archaeology.

### **7.1.16      *Uttlesford District Council***

Uttlesford District Council, a Shire District in the East of England, runs Saffron Walden Museum. Initially established in 1835, the building and mixed collections are owned by Saffron Walden Museum Society. The museum most recently reported visitor numbers of 15k in 2014, alongside a gross expenditure of just under £210k (Uttlesford District Council FOI Response, 2017; Visit Britain, 2015).

### **7.1.17      *Warwick District Council***

Warwick District Council is a Shire District in the West Midlands. It runs Leamington Spa Art Gallery and Museum, which has fine and decorative art collections alongside local history galleries. The museum spent £700k gross in 2014-2015 (Warwick District Council FOI Response, 2017).

### **7.1.18      *Welwyn Hatfield Council***

Welwyn Hatfield is a Shire District in the East of England. Welwyn Hatfield Museums Service runs two venues and spent £385k gross in 2014-2015 (Welwyn Hatfield Borough Council FOI Response 2017). Mill Green Museum and Mill is a working flour

mill that most recently reported 16k visitors in 2012 (Visit Britain, 2015). Welwyn Roman Baths is a Roman ruin and most recently reported 5.5k visitors in 2011 (Visit Britain, 2015).

### **7.1.19      *Worcestershire County Council***

Museums Worcestershire was formed in 2010 as a partnership between Worcestershire County Council and Worcester City Council. In the West Midlands, the former is a Shire County and the latter a Shire District. Wyre Forest District Council was asked to join the service, but withdrew from discussions in 2013 as they did not expect it to result in savings for them (Wyre Forest District Council, 2013). The service spent £1.7m gross in 2013 and runs 3 venues (Worcestershire County Council FOI response, 2017).

- The County Museum at Hartlebury Castle attracted 25k visitors in 2012 (Visit Britain, 2015). It originally opened in the north wing of the castle in 1966. The future of the museum was threatened in 2007 when the owners chose to sell the castle. The castle was eventually purchased with the support of an HLF grant by the Hartlebury Castle Preservation Trust, who embarked on redevelopment projects of the site.
- The Commandery, a historic building that acted as the Royalist Headquarters during the English Civil War Battle of Worcester.
- Worcester City Art Gallery and Museum houses natural history, social history, and archaeology. It originally opened in 1896 and reported 61k visitors in 2015 (Visit Britain, 2015).

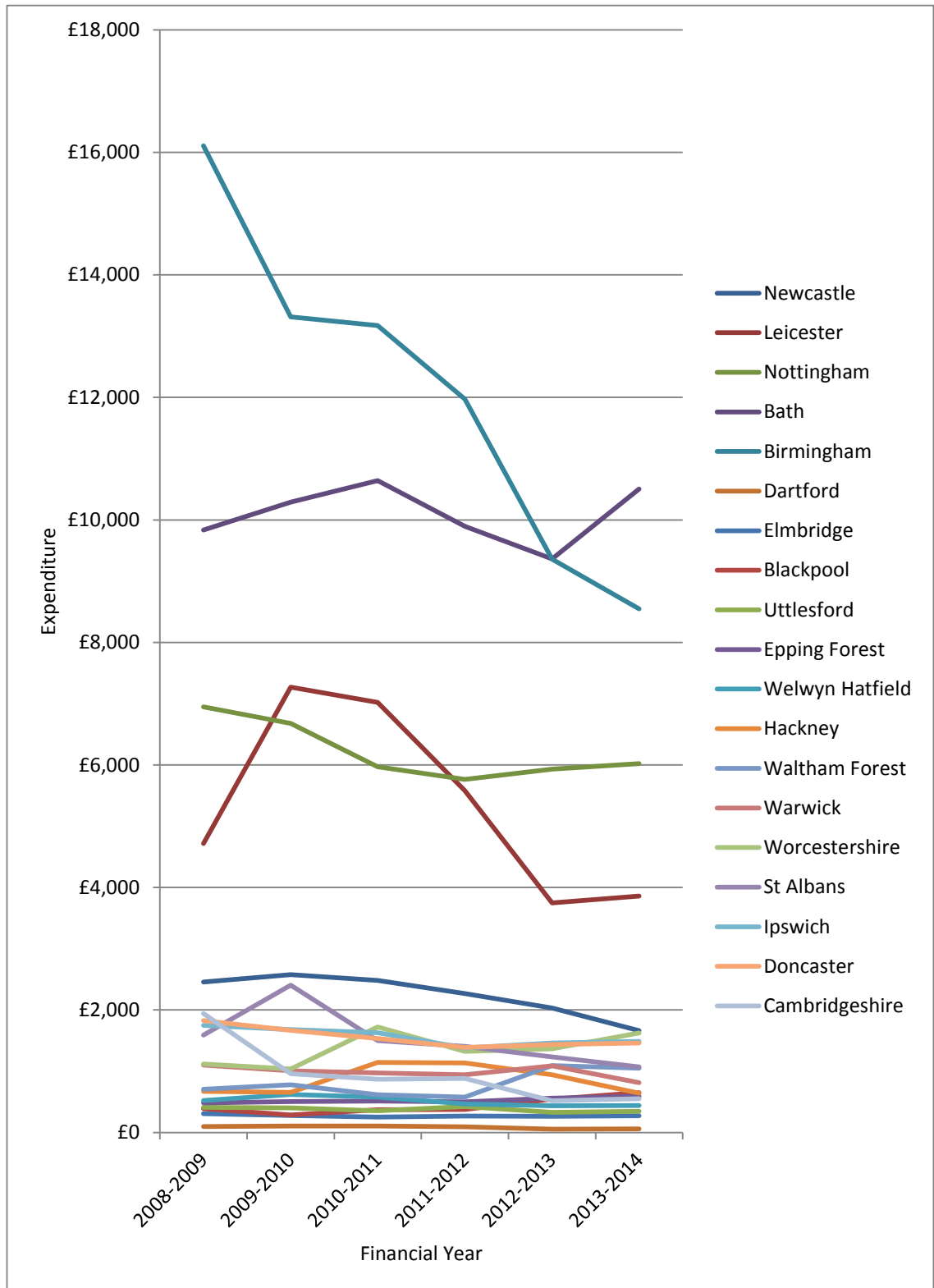
Financial information, organisational documentation, and interviews refer to the joint service as a whole rather than the role of Worcestershire County Council alone.

## 7.2 Overview of Cuts

In Section 6.2 I showed that many LAs have cut their expenditure on museums and heritage services year by year, but the overall picture is mixed. The LAs in my sample represent this complexity, as illustrated in Figures 18, 19 and 20 (overview in Figure 18, detailed views in Figures 19 and 20 for clarity). Birmingham City Council has the highest actual change in revenue expenditure on museums and heritage services, at over £700,000 between 2008-2009 and 2013-2014, whereas Cambridgeshire County Council has the largest decline as a proportion of expenditure, spending just 28% in 2013-2014 of what they spent in 2008-2009. Six (6) LAs in the sample have increased their revenue expenditure on museums and heritage. Bath have increased the most, with a nearly £700,000 increase in expenditure between 2008-2009 and 2013-2014. Blackpool has increased the most proportionately, with their 2013-2014 spending being 168% of 2008-2009.

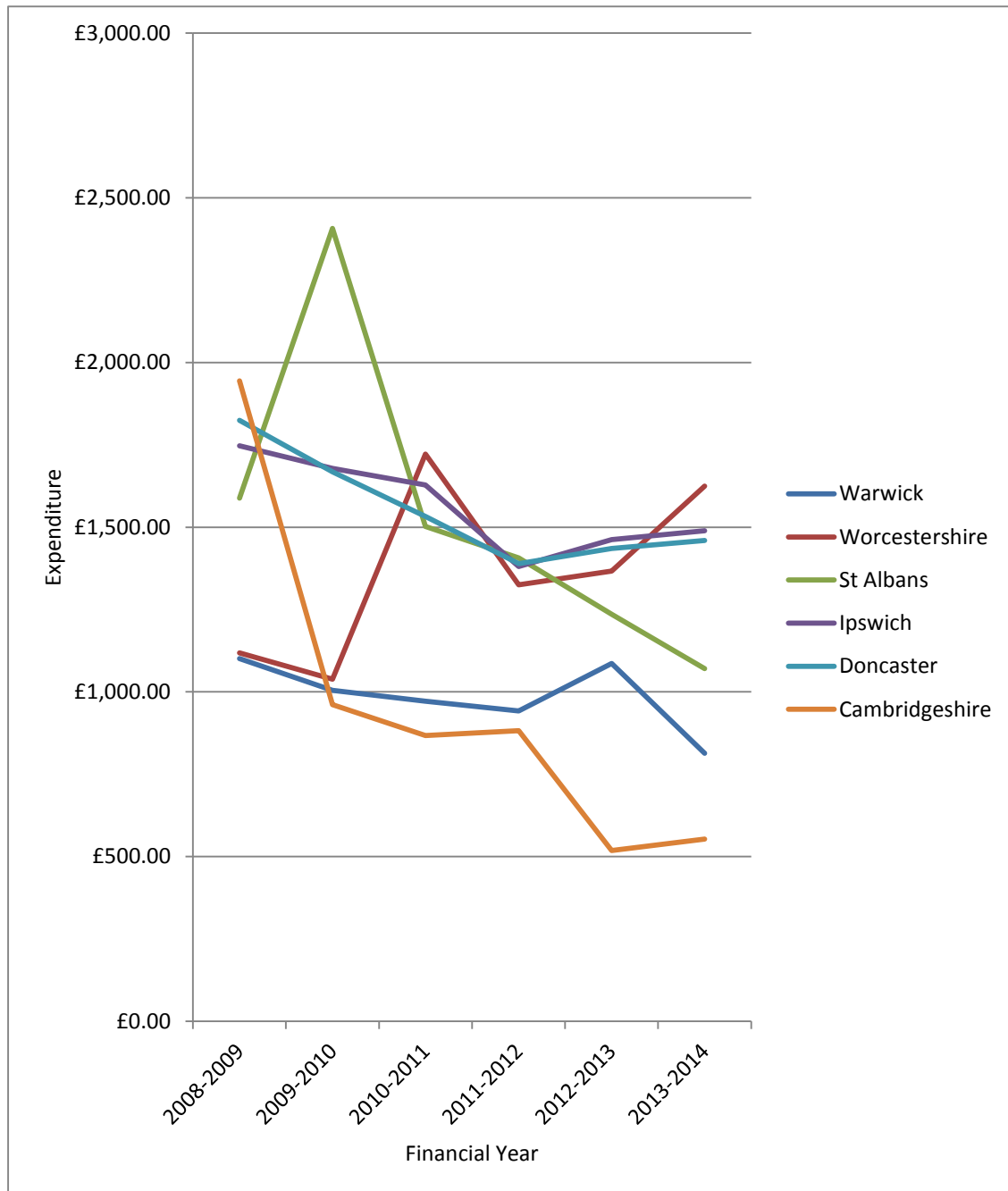
I discussed the limitations of this data in Section 5.3.2 and 6.4. Of relevance here is that it is not just expenditure on the museums directly governed and managed by the LA, but other expenditure related to museums, galleries and heritage services as well. To gain a more accurate picture of expenditure specifically on the sampled LAMs I sent a Freedom of Information (FOI) request to each LA, asking for a summary of expenditure on and income from the specific museums from 2007-2008 to present. Unfortunately, the responses were limited themselves (see Appendix 3) and it is therefore inappropriate to compare the responses in depth, but visual analysis is presented and the findings discussed as appropriate through the following chapters. It should be noted that income and expenditure is reported in the categories provided by the LA and therefore names are inconsistent between cases.

**Figure 16: Change in gross expenditure on Museums and Heritage by LA (£000s)**



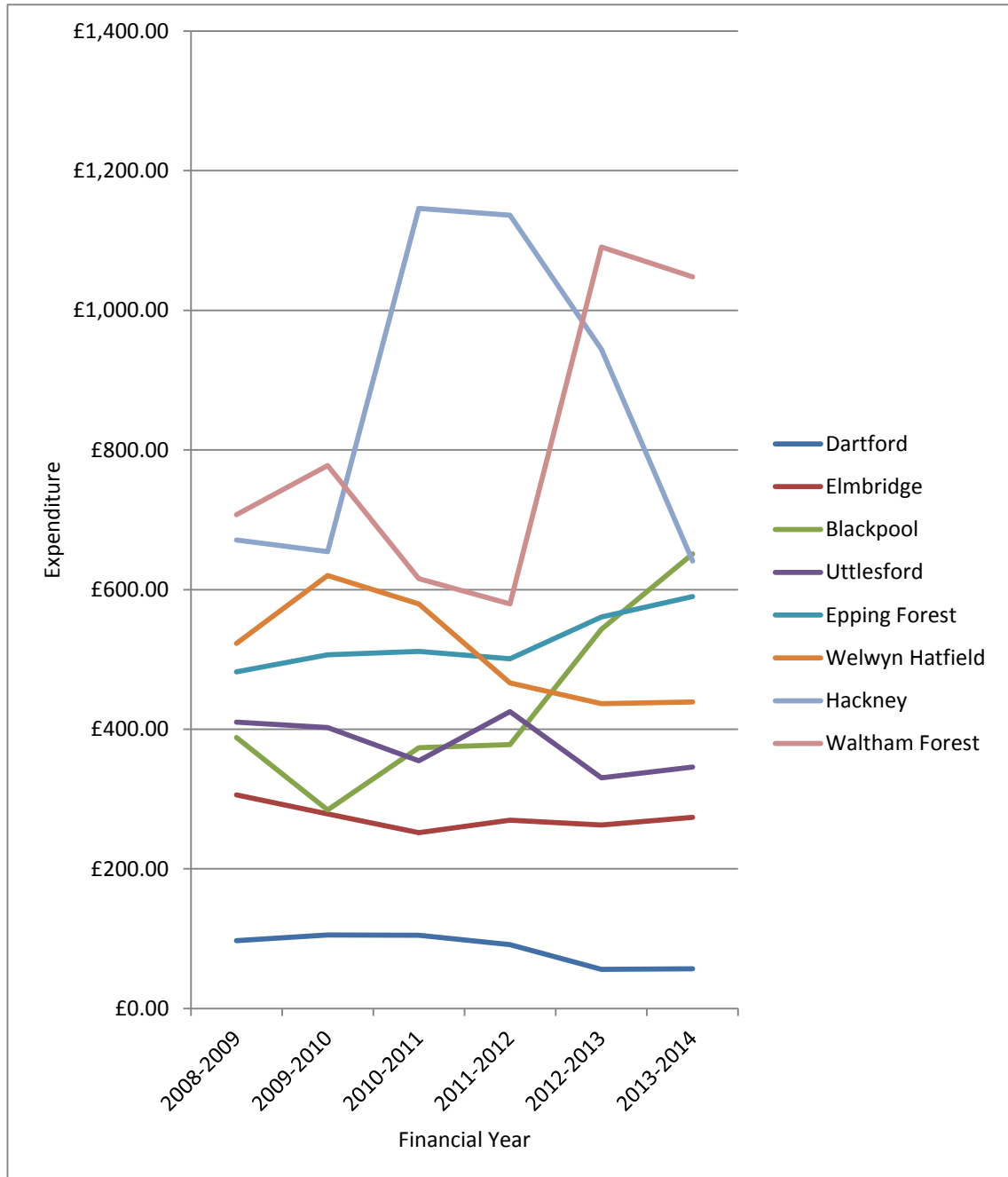
(Department for Communities and Local Government, 2009, 2011b, 2012a, 2012b, 2014a, 2015)

**Figure 17: Change in gross expenditure on Museums and Heritage by LA – between £1,000,000 and £2,000,000 per annum in 2008-2009 (£000s)**



(Department for Communities and Local Government, 2009, 2011b, 2012a, 2012b, 2014a, 2015)

**Figure 18: Change in gross expenditure on Museums and Heritage by LA – under £1,000,000 per annum in 2008-2009 (£000s)**



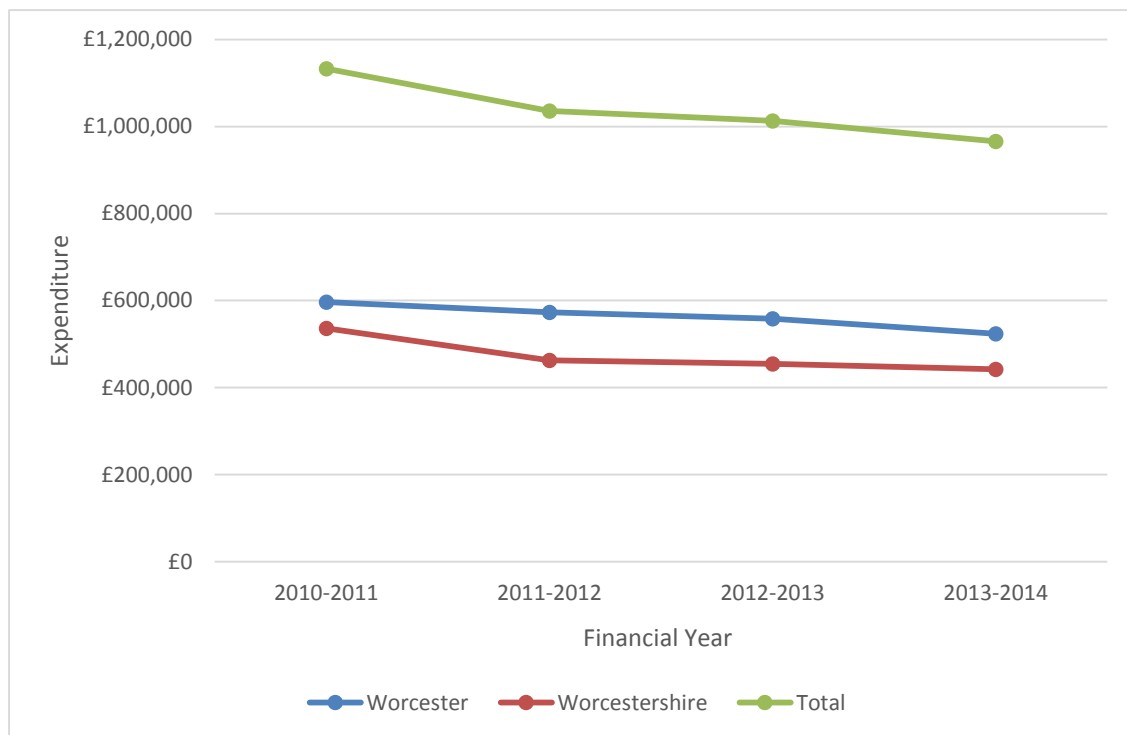
(Department for Communities and Local Government, 2009, 2011b, 2012a, 2012b, 2014a, 2015)

## 7.2.1 LA Funding

### *Expenditure on Local Authority Museums by Local Authorities*

For most of the sampled LAs, their net expenditure on LAMs decreased over the period of interest. For example, all three joint services saw their subsidy drop from their LAs. Adjusting for inflation, Museums Worcestershire lost 14.77% of their subsidy between their formation in 2010-2011 and 2013-2014, and CIMS lost 11.63% between 2008-2009 and 2013-2014 (Figure 21 and Figure 22 respectively). In comparison, TWAM lost 38.98% over this timeframe (Figure 23). However, this figure includes the loss of most of the contribution from Sunderland City Council when they withdrew their museums from the service, but also includes an increasing contribution from Newcastle University solely for the Great North Museum: Hancock. With these excluded, the remaining LA clients have passed a 32.13% cut in funding on to TWAM.

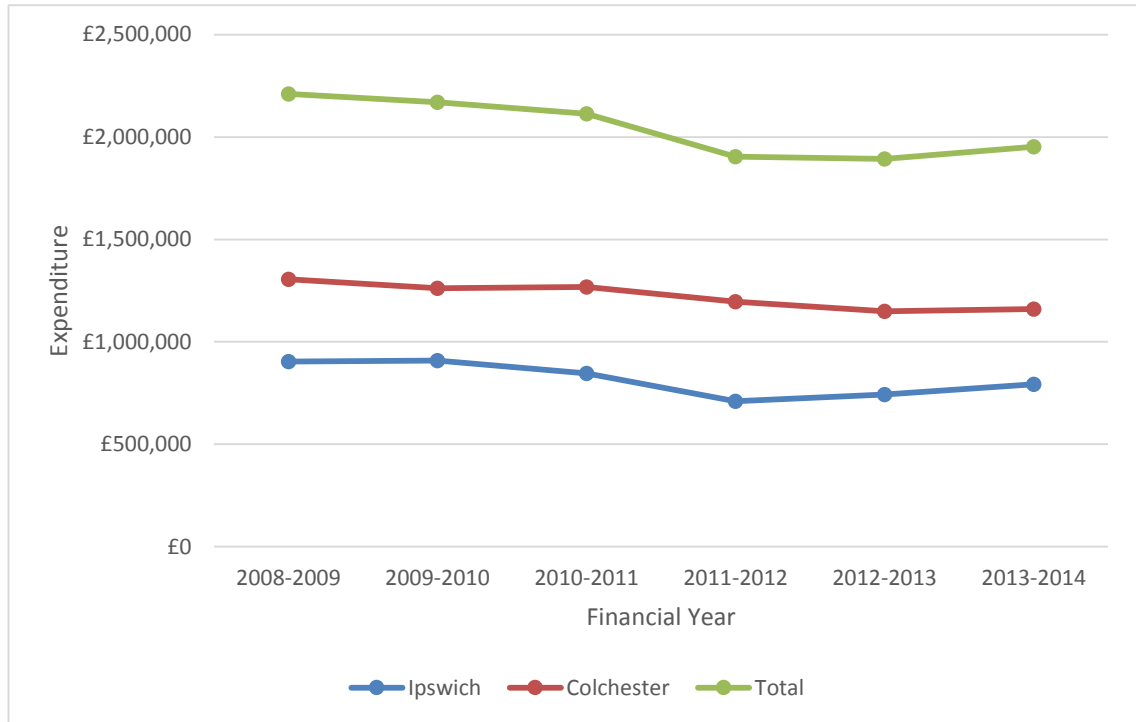
**Figure 19: Net Expenditure on Museums Worcestershire by Worcester City Council and Worcestershire City Council**



*(Worcestershire County Council FOI response, 2017)*

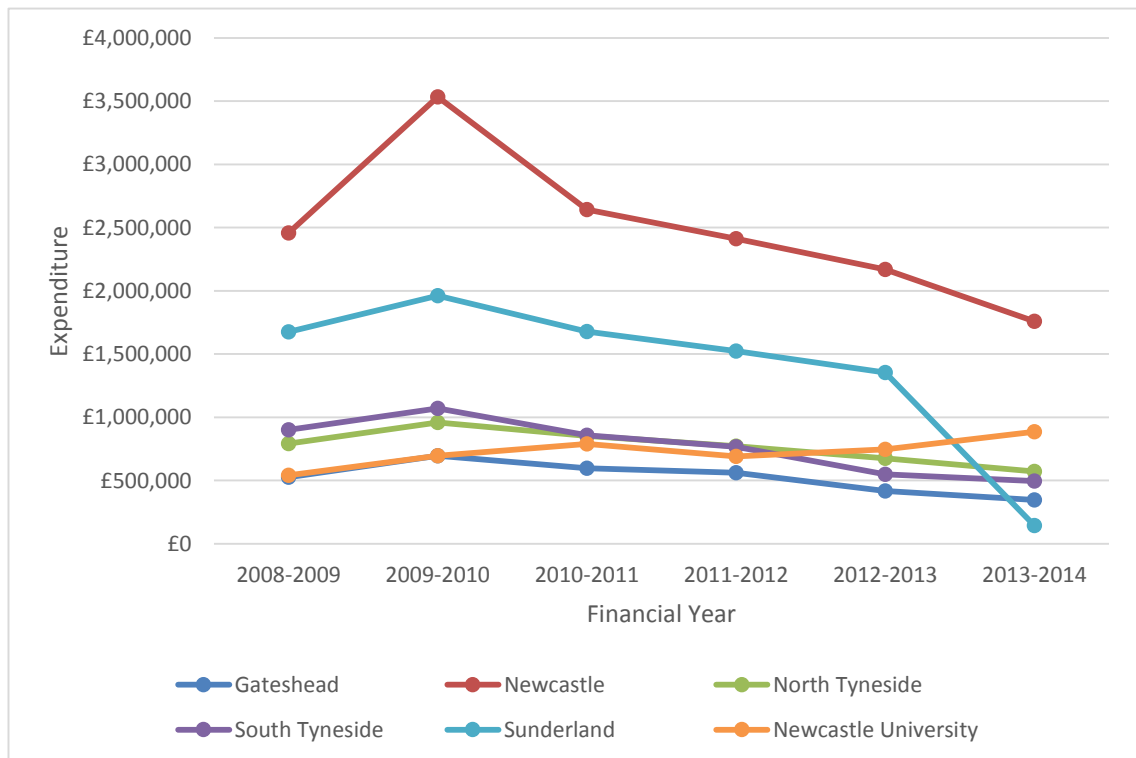


**Figure 20: Net Expenditure on CIMS by Ipswich Borough Council and Colchester Borough Council**



(Colchester Borough Council FOI response, 2017)

**Figure 21: Client Contributions to TWAM**

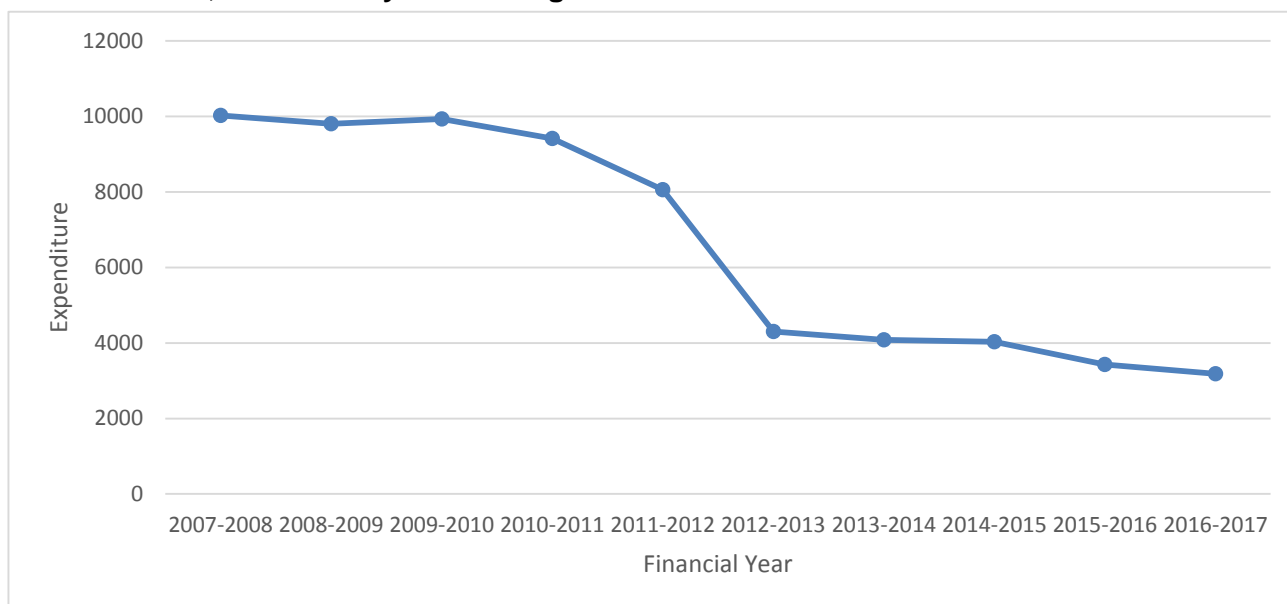


(Tyne & Wear Archives & Museums, 2011c, 2012d, 2013c, 2014b)

Both of the services devolved to Trust weathered decreased LA subsidy.

Cambridgeshire County Council ceased to fund the Cromwell Museum in 2016 when the Trust was established (Interview 1). Birmingham City Council report net expenditure on Museums and Heritage Services of up to £10m prior to the creation of Birmingham Museums Trust, and the trust reports subsidy from the City Council declining from around £4m to £3m over time (Figure 22).

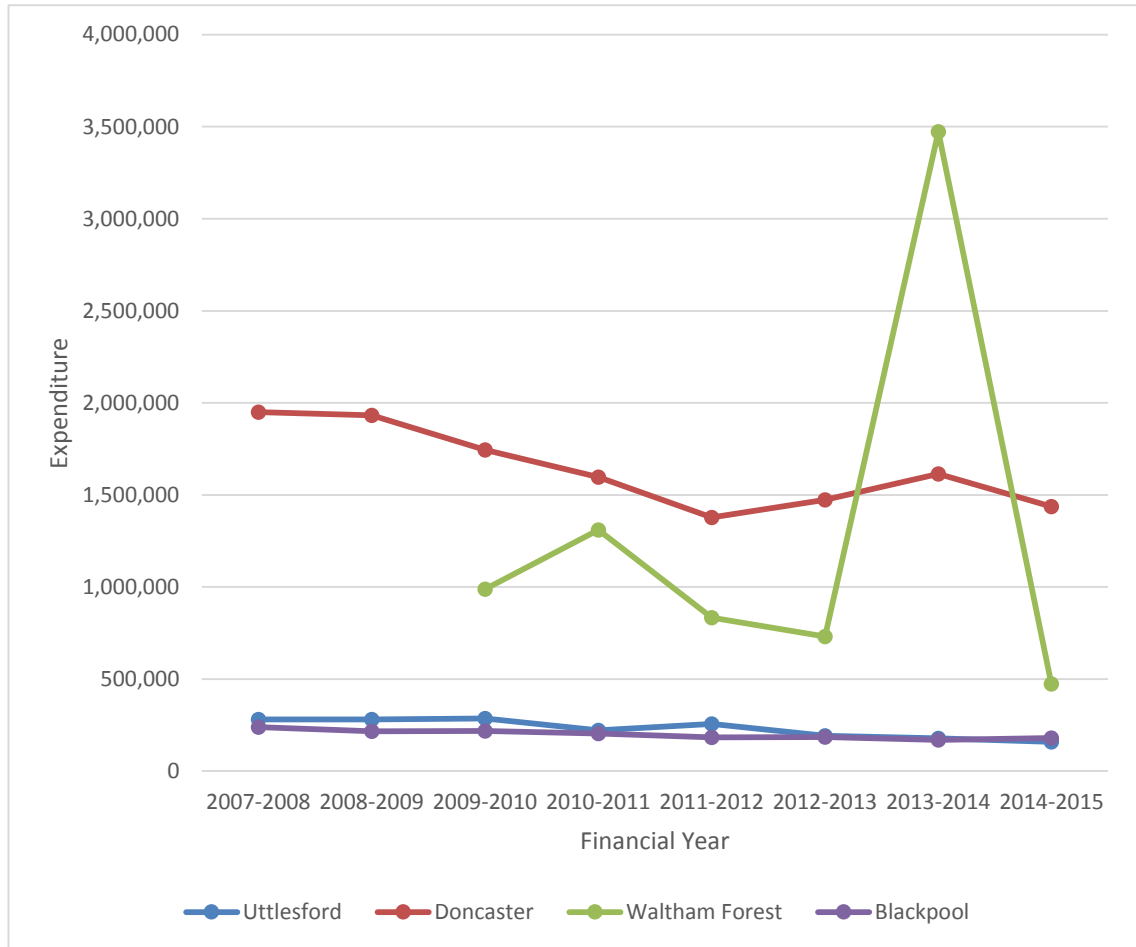
**Figure 22: Expenditure on Birmingham Museums and Heritage Services between 2007 and 2012, and Subsidy for Birmingham Museums Trust from 2012 Onwards**



(Birmingham City Council, 2007e; 2008g; 2009j; 2010g; 2011p; 2012d; Birmingham Museums Trust 2013c; 2014e; 2015; 2016; 2017)

Other services with a trend to decreased LA net expenditure include Uttlesford, Waltham Forest, Blackpool and Doncaster (Figure 23). Saffron Walden Museum in Uttlesford District Council ended 2014-2015 receiving 43.52% less from the council than in 2007-2008, adjusted for inflation, and the museums in Waltham Forest 52.14% less between 2009-2010 and 2016-2017 (Uttlesford District Council FOI Response, 2017; Waltham Forest Council FOI Response, 2017). The spike in expenditure in 2013-2014 is due to a major capital project that will be discussed in Section 10.3.4. The two museums in Doncaster saw a decline of 26.26% between 2008-2009 and 2014-2015, and the Grundy Art Gallery in Blackpool 25.30% (Blackpool Council FOI Response, 2017; Doncaster Metropolitan Borough Council FOI Response, 2017).

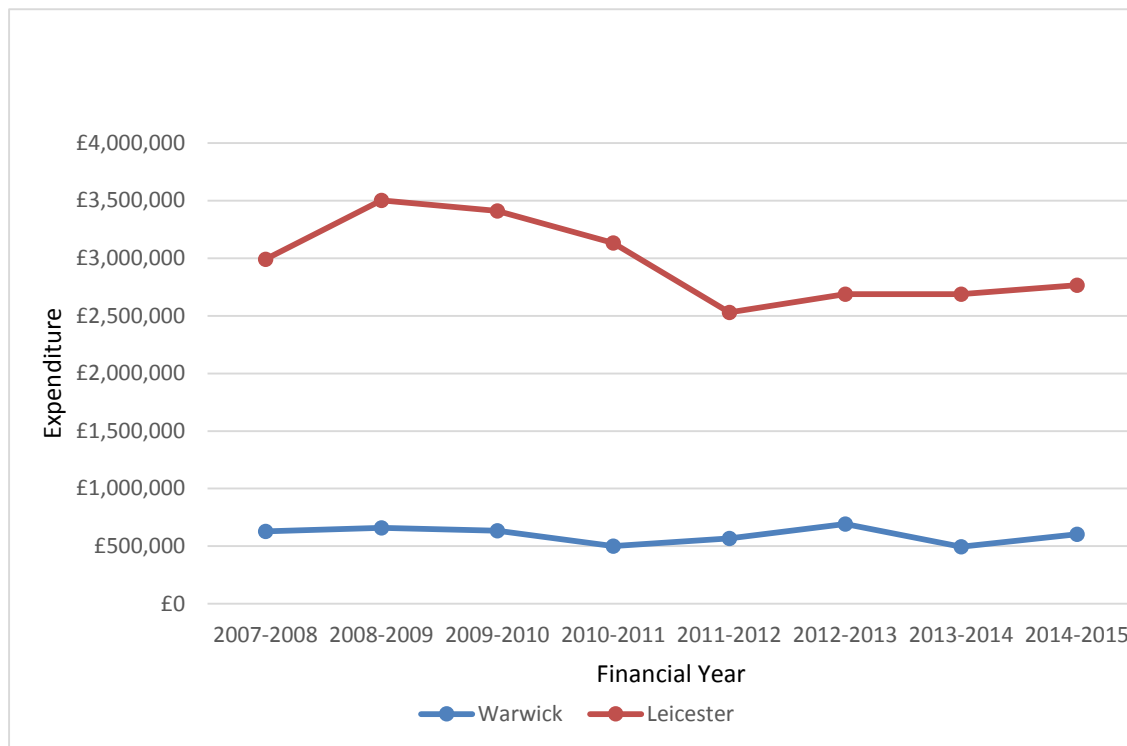
**Figure 23: Net Expenditure on LAMs by Uttlesford District Council, Doncaster Metropolitan District council, and the London Borough of Waltham Forest**



*(Blackpool Council FOI response, 2017; Doncaster Metropolitan Borough Council FOI Response, 2017; Uttlesford District Council FOI Response, 2017; Waltham Forest Council FOI Response, 2017)*

It is harder to see the trend for Leicester City Council’s gross expenditure on Leicester Museums and it would be useful to go back further: expenditure in 2007-2008 was £0.5m lower than the next three years and it is unclear if this was a trend or an anomalous year (Figure 23). Following this, a dip in 2011-2012 was followed by recovery. This supports the account of the interviewee for Leicester Museums, a senior member of staff, who explained that cuts to the museums service stopped after the election of a mayor with an interest in heritage (Interview 2). Nonetheless, the service ended 2014-2015 7.53% down on 2007-2008, adjusting for inflation (Leicester City Council FOI Response, 2017). Expenditure by Warwick District Council is also difficult to interpret, with the figures fluctuating over the year, but the service ended 2014-2015 3.98% down on 2007-2008, adjusting for inflation (Warwick District Council FOI Response, 2017).

**Figure 24: Net Expenditure on LAMs by Leicester City Council and Warwick District Council**



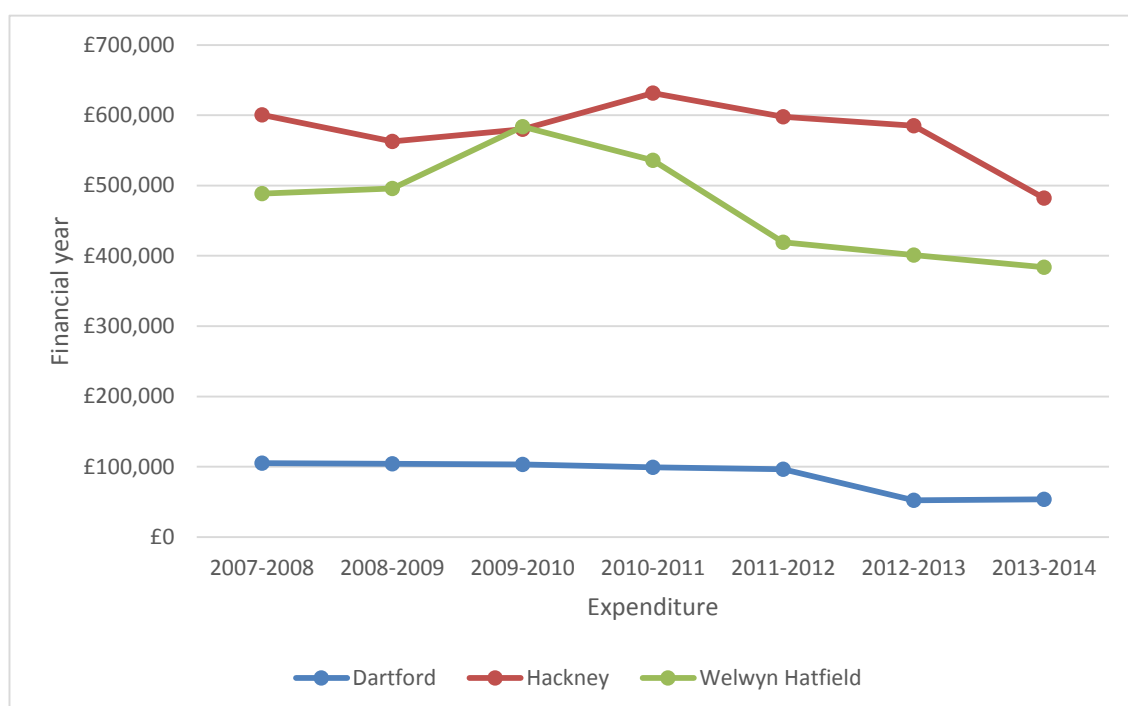
*(Leicester City Council FOI Response, 2017; Warwick District Council FOI Response, 2017)*

In other cases, the drop in gross expenditure by the LA is not possible to discern from the data provided. For example, net expenditure on Hackney Museum has declined since 2012-2013 but unfortunately I do not have an income figure and therefore do not know how much the gross expenditure to the council is (Hackney Council FOI Response, 2017). If income has stayed stable then the gross expenditure of the council has declined, if income has declined then gross expenditure of the council may have stayed stable. Committee papers suggest the former (Hackney Council, 2010b: 11, 2011b). The three years prior to 2012-2013, however, had increased expenditure and committee papers suggest that this was due to grant-funded special projects associated with the 2012 Olympic Games rather than increase in direct LA expenditure (Hackney Council, 2012).

Similarly, expenditure on Welwyn Hatfield Museums has steadily declined since its peak in 2009-2010 (Welwyn Hatfield Borough Council FOI Response, 2017). As with Hackney Museum it is unclear whether this has been caused by decline in expenditure by the council or decline in income from other sources. However, cuts are described in committee papers, suggesting the former (Welwyn Hatfield Borough Council, 2011a).

Finally, expenditure on Dartford Museum shows relative stability until 2012-2013 when decline is associated with the loss of a staff post (Dartford Borough Council FOI Response, 2017; Dartford Borough Council, 2007c, 2013a). Again, while the figures provided do not show the impact of this on the council's gross expenditure, committee papers show that income from other sources is minimal making it likely that a drop in LA net expenditure is responsible for the majority of this drop (Dartford Borough Council, 2007c, 2014b).

**Figure 25: Expenditure on Hackney Museum, Dartford Museum and Welwyn Hatfield Museums**

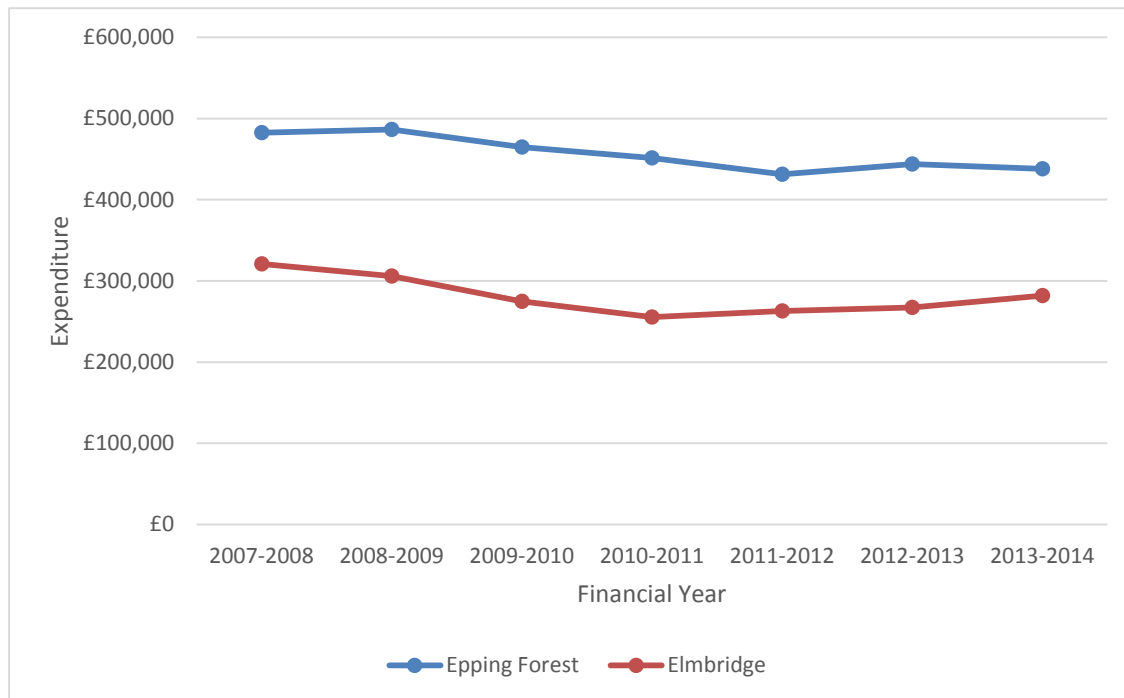


*(Dartford Borough Council FOI Response, 2017; Hackney Council FOI Response, 2017; Welwyn Hatfield Borough Council FOI Response 2017)*

In two cases, cuts are only apparent after the financial information is adjusted for inflation. At first glance, Epping Forest and Elmbridge appear to have increased expenditure on their museums, but after adjusting for inflation it is apparent that the later figures are actually worth less (Figure 25). The drop in Epping Forest is 9.26% and Elmbridge 12.17% between 2007-2008 and 2013-2014, adjusting for inflation (Epping Forest District Council FOI Response, 2017; Elmbridge Borough Council FOI Response, 2017). As above, these figures are total expenditure rather than gross expenditure and therefore one cannot say whether it is income or the gross expenditure of the council that has declined. It is of particular interest that expenditure on Elmbridge Museum has dropped less than other cases despite the closure of the

physical museum and the move to an outreach-only service. One would expect greater savings from this due to the loss of costs associated with the museum premises.

**Figure 26: Expenditure on Epping Forest Museum and Elmbridge Museum**



*(Epping Forest District Council FOI Response, 2017; Elmbridge Borough Council FOI Response, 2017)*

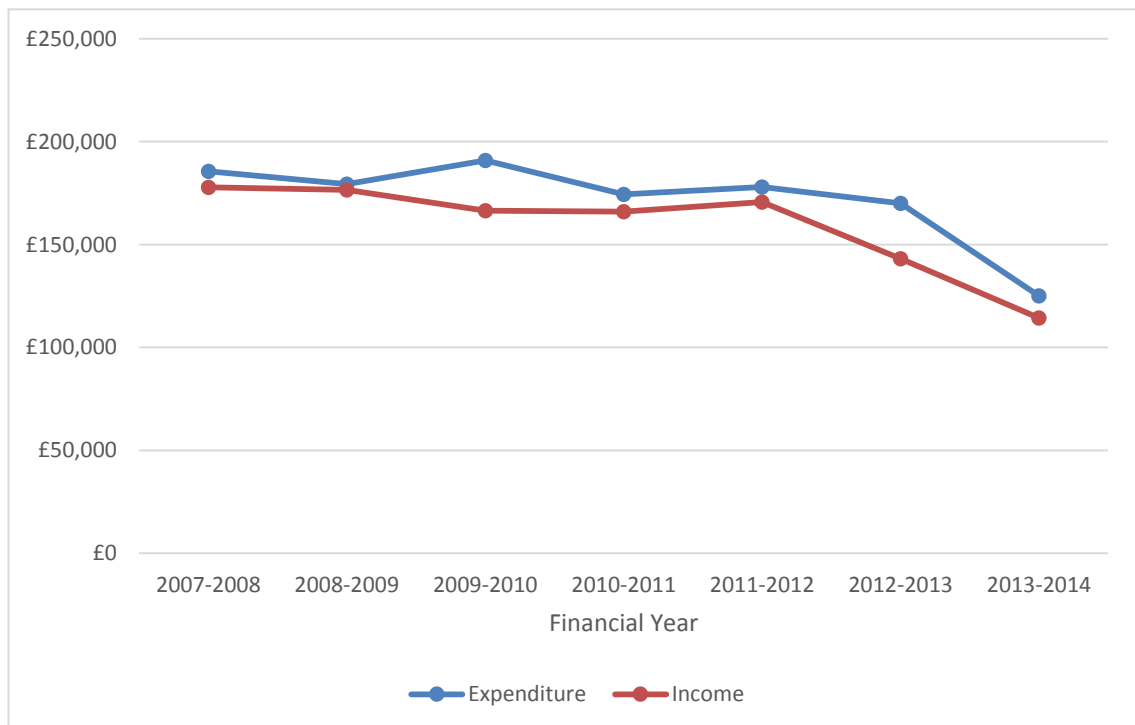
### *The Nature of Cuts*

The organisational documentation and interviews add qualitative detail to these findings. For example, cuts made elsewhere within LAs have had an impact on LAMs. Interviewees for both Bath and CIMS report that cuts to centralised HR services meant taking on more of this type of work, with Bath actually having recruited additional staff to cover HR activities (Interview 8; Interview 9). Both Bath and Leicester Museums have dealt with the standardisation of IT systems across the LA as a cost saving measure (Interview 2; Interview 8). In Bath, this resulted in services required by staff that do not work using a computer being only accessible online (Interview 8). For Museums Worcestershire, specialist marketing support from Worcestershire County Council was lost (Worcestershire County Council, 2011b). The interviewee for Uttlesford reported that council workers appear more stretched and that it is difficult to get a response to emails and phone calls (Interview 7). St Albans Museums Service also reports that staff morale was suffering in the wider landscape of LA budget cuts (St Albans City and District Council, 2010a). It is apparent that budget cuts across LAs

have contributed to the challenge faced by LAMs, in terms of workload, support, and morale.

The impact of austerity on schools has had a clear knock-on effect on LAMs with the majority reporting a decrease in the number of school visits and associated income. This was attributed to the cost pressures for schools rather than declining interest. For example, TWAM reported that loan boxes going out to schools were fully booked despite a drop in onsite visits, suggesting that the issue was the cost of physically visiting the museum (Tyne & Wear Archives & Museums, 2011a, 2012a). However, difficulty in engaging with schools was also attributed to the move to academies. One interviewee in Worcestershire found that academies were harder to engage with due to break down of LA networks (Interview 11). Local Authorities recognised this as an issue, with a councillor for CIMS suggesting that funding from elsewhere in the council should be used to assist schools with transport costs to make museum visits more accessible (Colchester Borough Council, 2014b, 2014a). Interestingly, the financial information provided by Doncaster Council shows income from their education services declining somewhat similarly to their expenditure (Figure 26). This suggests, for this case at least, LAM spending cuts may have had an impact on school visits, rather than the decline being solely due to school spending cuts.

**Figure 27: Expenditure on and Income from Education Services by Doncaster Metropolitan Borough Council**



(Doncaster Metropolitan Borough Council FOI Response, 2017)

The interviewee for Birmingham Museums Trust believes that cuts had been made too quickly, hindering their ability to develop strategies and forge relationships to cope:

I don't think our relationship with the city council is as good as I would like it to be [...] The fact that public funding has declined so rapidly over the time since the Trust was set up has made it much more difficult than it otherwise would have been to come to that sort of shared understanding. (Interview 14)

Further, a common theme reported from LAMs was uncertainty about the future of their LA funding (e.g. Interview 5). With budgets not confirmed until the last minute, LAMs have struggled to plan beyond the short term (Colchester & Ipswich Museum Service, 2009a; Tyne & Wear Archives & Museums, 2010c). Accurate information about future income and expenditure is important for maintaining a balanced budget (Ehrenhard et al., 2012: 613). However, Ipswich and Colchester councils indicated that they would explore a longer term strategy to enable more effective planning (Colchester & Ipswich Museum Service, 2010d).

Overall, cuts to LAM budgets have been exacerbated by cuts elsewhere in the LAs. The speed of cuts and ongoing uncertainty over the future has stifled effective planning and the development of alternative strategies.

## **7.2.2 Funding from the MLA and ACE**

### *Loss of Renaissance and the MLA*

The abolition of the MLA had a distinct impact on the sampled LAMs, many of which received funds through the Renaissance in the Regions programme. Renaissance funding was specifically associated with access and education work, providing audience development staff in Birmingham and enabling the expansion of learning programmes and funding a two-year education project for CIMS (Birmingham City Council, 2009b; Colchester & Ipswich Museum Service, 2009d). The loss of Renaissance therefore had an impact on these activities. For example, Leicester used Renaissance funding for its outreach and education teams, and these staff were lost along with staff working on making the collections accessible (Interview 2).

Renaissance funding also enabled museums to develop a regional support role, such as in Birmingham, where it was described as supporting the service in being a regional centre of expertise, and for CIMS where it funded a conservation officer to advise other museums in the region (Birmingham City Council, 2011a; Birmingham Museums & Art Gallery, 2008b; Colchester & Ipswich Museum Service, 2010a). Worcestershire County



Council also reported benefiting from the Museum Development Programme, which helped enhance staff and volunteer skills across the county (Worcestershire County Council, 2012c). However, I did not find specific evidence of change in this area.

Nonetheless, the abolition of the MLA and loss of Renaissance funding brought uncertainty to LAMs. For example, it funded the Worcestershire 'Museum on the Move' programme to enable outreach in rural areas and with hard to reach groups, and the service had to seek other funding to continue (Worcestershire County Council, 2012c). Uncertainty and additional work at this time of transition is shown in the language used to report this to the TWAM committee:

It is believed that some of the functions of MLA will transfer to the Arts Council of England although this has not yet been confirmed. It is also believed that the Renaissance programme will be maintained post March 2011 although this is subject to confirmation following the spending review announcement on 20 October. The present structure of Hub museums is likely to change and TWAM would need to apply to become a core museum. (Tyne & Wear Archives & Museums, 2010c).

However, in line with Babbidge's description of the abolition of the MLA as 'unlamented' (Babbidge, 2015: 24), two recipients of funding through Renaissance suggested that it hindered them through heavy-handed bureaucracy and poor planning:

One of the effects of Renaissance [...] was that we had to spend so much time dealing with Renaissance that we actually didn't do the ducking and diving and the grant applications that we would have done. (Interview 2).

[...] it meant that we did sometimes, I think, shoot off in all sorts of different directions, chasing different groups and different activities, and then the money ran out and we just stopped, and it wasn't necessarily a strategy which was building over time, and I think [...] there are legacies of that expenditure but a certain percentage of it has sort of dissipated, so we're not in that situation again. (Interview 9).

### *ACE and Museums*

ACE taking over responsibility for museums in 2010 has had an impact on LAMs. For example, the annual accounts published by TWAM show that the funding they have received from ACE is lower than the combined funding they had previously received from the MLA and DCMS (Table 53). This cut is on top of the reduction in subsidy from

LAs. The interviewee for Birmingham, a senior member of staff, described how a drop in their ACE funding coincided with cuts to their LA subsidy, necessitating a second restructure to the service when the first had only just been completed (Interview 14). Leicester also reported reduced ACE funding alongside wider budgetary pressures and the interviewee expressed frustration at being ineligible for Major Partner Museum status due to not having a designated collection (Interview 2; Leicester City Council, 2011a).

**Table 53: Funding Received by TWAM from the MLA, DCMs and ACE (£000s)**

	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015
MLA Renaissance	£2,187	£2,082	£2,185	£1,888			
DCMS Grant-in-Aid	£2,206	£2,436	£3,699	£1,918			
ACE Major Partner Museum					£3,797	£3,727	£3,692
Total	£4,393	£4,518	£5,884	£3,806	£3,797	£3,727	£3,692

(Tyne & Wear Archives & Museums, 2011c, 2012d, 2013c, 2014b)

As discussed in Section 3.4, there was some concern from stakeholders in the museums sector about ACE taking over the MLAs museum responsibilities. For example, Babbidge argued that the museum functions bestowed upon ACE following the abolition of the MLA fit uneasily due to ACE being primarily a grant giving organisation, whereas the museum functions require consideration of standards and cultural significance (Babbidge, 2015: 24). In this study, the Birmingham Museums Trust interviewee reported feeling that some staff at ACE are yet to appreciate the difference between the wider arts and museums. In particular they felt that ACE did not appreciate the importance of local social and natural history in regional museums (Interview 14). The interviewee for TWAM felt that while many people at ACE understood the nature of museums, the overall organisation did not (Interview 13). The interviewee felt that it was important for the sector to lobby ACE overall, not just the museums section of ACE, and to get involved in networks in order to make the needs of museums clear (Interview 13).

However, all cases reported that ACE had generally been supportive so far, in line with Davies's assertion that ACE would provide 'bottom-up encouragement' to museums, in comparison to the top down approach of the MLA (Davies, 2011: 2). Though Birmingham Museums Trust lost grant-in-aid funding from ACE, the interviewee felt

that the organisation had been very supportive and that their relationship was positive overall (Interview 13). Interviewees at the Cromwell Museum reported that ACE had been very understanding of their inexperience when they applied for accreditation (Interview 1; Interview 6). Further, the TWAM interviewee reported being glad for museums to be included in the wider arts sector in ACE, describing the service's partnerships with other cultural venues in the region as 'powerful' (Interview 13).

In addition, committee papers reported a substantial variety of funds coming from ACE to LAMs. For example, The Grundy Art Gallery in Blackpool received funds to work with digital media for temporary exhibitions and for community programmes, while Epping Forest District Museum received funding to develop temporary exhibitions tailored towards young audiences, focusing on the region, which were intended to tour regional museums (Blackpool Council, 2012a, 2014c; Epping Forest District Council, 2013). Nottingham received the support of ACE to undertake a range of projects and invest in infrastructure (Nottingham City Council, 2012b).

TWAM has become increasingly reliant upon ACE. The interviewee reported in 2016 that around 40% of the organisation's funding came from ACE, compared to 31% documented in 2013 (Interview 13; Tyne & Wear Archives & Museums, 2013a). As might be expected with this level of funding, ACE was commonly mentioned both in committee papers and by the interviewee. ACE helped to maintain aspects of the Renaissance scheme, enabling the service to support other museums in the region and to target hard-to-reach communities who might not be able to use services that were not free at point of use (Interview 13; Tyne & Wear Archives & Museums, 2013c). However, a committee report described how enhancing entrepreneurial culture within the organisation was part of the agreement of their Major Partner Funding (Tyne & Wear Archives & Museums, 2012d). Further, receiving Major Partner Museum funding, TWAM report against ACE's 5 strategic goals in addition to their own, and that they are expected to deliver 'excellence' (Tyne & Wear Archives & Museums, 2013c, 2014b). This provides a snapshot of the complex and contradictory nature of museum funding: ACE fund TWAM to be accessible but also excellent, a difficult and potentially elitist concept to define, seemingly in opposition to the accessibility mission (See Section 4.1). In fact, TWAM have previously argued against the peer review that came with the excellence agenda, stating that their role was to satisfy stakeholders rather than peers (Graham, 2009: 327). ACE also fund TWAM to provide access to people who cannot pay, but expect them to look for opportunities to generate income, which can be seen as dividing the organisation into two functions with the balance between important to manage.

## 7.3 Impact of cuts

In this section I introduce the impact of budget cuts on LAMs and LAM services. The impacts discussed here are not exhaustive, and are informed by the topics covered in the MA cuts survey. This is therefore intended to be a starting point on which the following chapters will build.

### 7.3.1 *Opening Hours and Visitor Numbers*

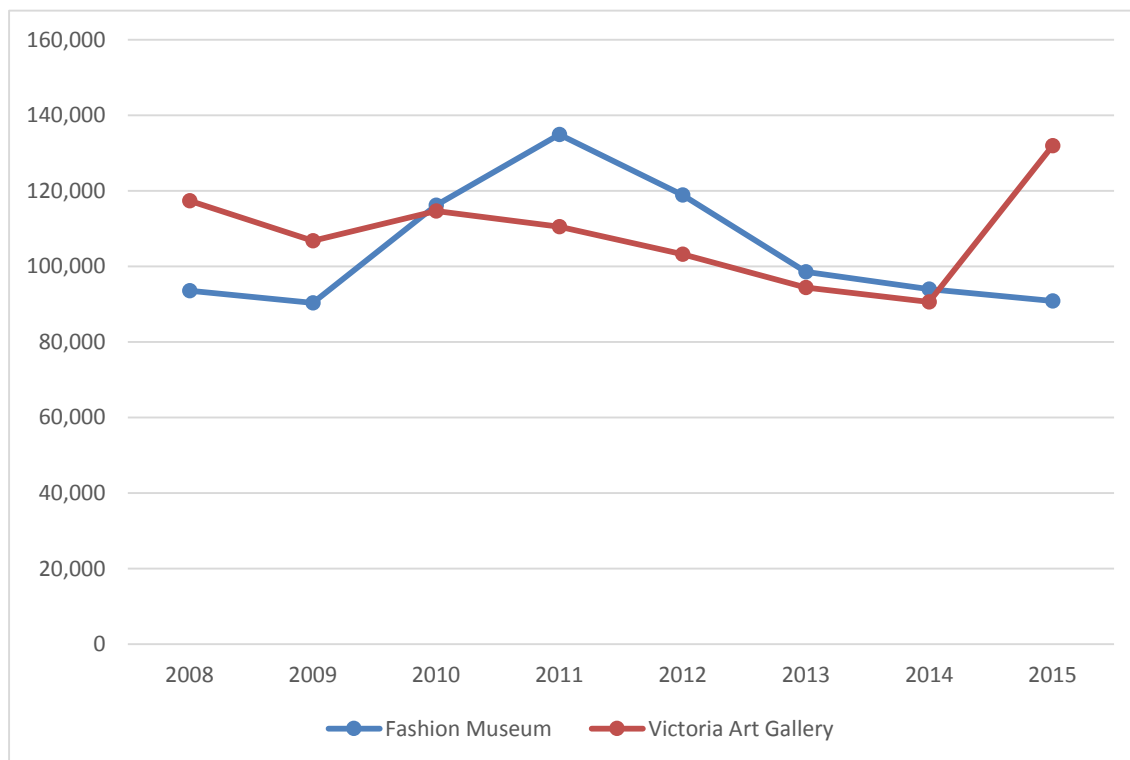
As one would expect due to the results of the MA cuts survey, the cases studies provide examples of reduced opening hours. In three cases, reduced opening hours were associated with staffing deficits: Dartford Museum and Welwyn Hatfield's Mill Green Museum's opening hours were reduced in line with reduced staffing, whereas in Saffron Walden Museum, the museum began to close on Mondays to enable staff to spend a day working at the stores, as this was perceived as a higher priority (Dartford Borough Council, 2013a; Saffron Walden Museum, 2014b; Welwyn Hatfield Borough Council, 2011c). In Dartford, the council considered how opening hours could better suit public demand, and trialled different hours in an attempt to increase visitor numbers (Dartford Borough Council, 2008b). Nonetheless, numbers halved from 8k to 4k between 2010 and 2015, with a clear drop between 2011 and 2012 that follows the drop in expenditure (Figure 25), staffing (Section 7.3.2), and opening hours (Visit Britain, 2011; 2015). For TWAM, small reductions in opening hours and seasonal closures were reported in response to budget pressures (Tyne & Wear Archives & Museums, 2012d, 2012c). About half of TWAM venues lost visitors between 2010 and 2015, such as Arbeia Roman Fort which reports 49k in 2010 and 32k in 2015, though these reductions cannot be directly tied to open hour changes. Further, the Discovery Museum, Segedunum Roman Fort, and the Great North Museum: Hancock almost maintained their numbers, and Stephenson Railway Museum dramatically increased visitors from 23k in 2010 to 44k in 2015 (Visit Britain 2011; 2015).

Epping Forest District Museum and the Cromwell Museum report changing their hours to suit visitors: in Epping Forest to match those of the library and therefore make more sense to visitors, and in the Cromwell Museum to match the times when Huntingdon town centre was busiest (Epping Forest District Council, 2011b; Interview 1). Opening hours were actually increased at one venue in Leicester to bring them in line with other venues as this would be clearer for visitors and would make advertising easier (Leicester City Council, 2012b).

Councillors for Museums Worcestershire hesitated over reducing opening hours, with the committee requesting more evidence and postponing their decision on multiple occasions (Worcestershire County Council, 2012a, 2012c, 2013d). The service suggested that they should open on Sundays despite evidence that this was the weakest day, due to the desire to promote the museum more to day and weekend break visitors (Worcestershire County Council, 2013d). As such, an overall trend of reduced opening hours, and therefore access, was not apparent.

Other than at Dartford Museum, where the quantitative data shows a distinct pattern, visitor numbers are difficult to analyse. This is in part because there are many factors affecting visitor numbers and in part because not all services have reported them, or have not reported them for all year. For the former, for example, visitor numbers at the Bath Heritage Service's Roman Baths increased fairly from 900k to 1m between 2010 and 2015, and the interviewee attributed this to their investment in promotion and facilities, except for a dip in 2012 attributed to the impact of the London Olympic Games (Interview 8). In comparison, visitor numbers at the service's two other venues have fluctuated over time, potentially due to different investments, exhibitions, events, and promotions (Figure 28). The varied situation is present in Birmingham as well, with the Birmingham Museum and Art Gallery increasing visitor numbers from 630k in 2010 to 910k in 2015, but Blakesley Hall going from 24k to 18.5k over this time. Of the museums with visitor numbers reported to Visit Britain in both 2010 and 2015, 40% lost visitors, 30% stayed within 10% of their 2010 visitor number, and 30% increased their numbers (Visit Britain, 2011; 2015) (Appendix Four).

**Figure 28: Visitor numbers at Bath Heritage Service’s Fashion Museum and Victoria Art Gallery**



(Visit Britain 2011; 2015)

### 7.3.2 Staffing

In his account of cuts at the Canadian Glenbow Museum, Janes reported that there were alternatives to cutting staff, but that they chose to do this as it was the quickest option (Janes, 2013b: 43, 65). Certainly, I described above that LAMs consider the cuts to their funding to have come quickly, and therefore expect that they saw no alternative but to reduce staffing. Indeed, most cases do report reduced staffing (e.g. Dartford Borough Council, 2013a; Interview 2; Interview 5; Interview 7; Interview 13; Interview 14; Welwyn Hatfield Borough Council, 2012b). In some cases the decline appears quite dramatic, such as in Birmingham where cuts to staffing are regularly reported (Birmingham City Council, 2011f, 2015a). For example, 30.5 posts were deleted and 4 had hours reduced, compared to 5 new posts created following a service redesign and restructure in 2011-2012 (Birmingham City Council, 2011a). The service also sought to make savings through voluntary redundancy and a recruitment freeze and there were 'several phases of organisational restructure', suggesting long-term disruption to staff (Birmingham City Council, 2011d, 2011a). The opinion of the interviewee for this service was that they had as few staff as they could manage with and that further cuts would necessitate closing a venue (Interview 14). In small services, loss of staff may

have had a similarly dramatic effect despite the smaller number: in Dartford staffing fell 50% as there were previously two members of staff and now there is only one (Dartford Borough Council, 2007c, 2013a). However, other than reduced opening hours, the impact of this on the service was not specifically reported.

### *Types of Roles Lost*

Though loss of staff came from most areas of the sample LAMs, interviewees raised specific concerns about the loss of curators, conservators and learning staff (Interview 7; Interview 10; Interview 14). For example, the Birmingham Museums Trust interviewee felt that the current number of curators was on the verge of being too few, and that conservators could only just keep up with preventative conservations (Interview 14). This trend resulted in loss of knowledge, both in terms of that held by lost staff about the collections they had managed (Interview 11), and in relation to furthering knowledge:

I think there's a concern right across local authority museums at the moment in terms of curatorial expertise because we're having to very much focus on public programming, which means that whilst we absolutely look after the collections and make sure nothing is lost or damaged, I'm concerned about the future of knowledge and I think we are knowledge-based organisations. (Interview 13).

Delays in recruitment hindered the ability of LAMs to deliver services and reach their targets. For example, despite the inclusion in the learning mission of 'learning is at the heart of Saffron Walden Museum', the service was unable to replace the learning officer when the position became vacant due to lack of funds, and this meant that the target for school visits had to be reduced (Interview 7; Saffron Walden Museum, 2014c; Uttlesford District Council, 2014e). Interestingly, when a learning officer was in post the service generated more income (Uttlesford District Council, 2010a). The interviewee reported that the council wanted them to increase their income generation, but was not supporting them in doing so in this way (Interview 7). Delays in recruitment were also credited with affecting figures for school visits in Epping Forest and in Worcestershire, where it was uncertain where funds for the post would come from (Epping Forest District Council, 2009b; Interview 11).

### *Types of Responsibilities Gained*

The MA report concerns about the impact of staff time on funding applications taking away from public engagement and distorting the museum's mission (Museums

Association, 2014: 15). Welwyn Hatfield's service decided to reduce the number of special exhibitions produced so that staff could focus on fundraising and marketing, and fundraising was added to staff workloads at Museums Worcestershire, where there were no specific staff for this (Interview 10; Welwyn Hatfield Borough Council, 2011a). Both Museums Worcestershire and Saffron Walden Museum staff attended fundraising training courses, the latter received through the ACE resilience scheme (Interview 10; Uttlesford District Council, 2015a). An interviewee for Museums Worcestershire felt that the training had been a good start, but that fundraising effectively required practice (Interview 10).

Loss of staff appears to have increased the range of activities taken on by those that remain across many areas. For example, the interviewee at Saffron Walden Museum reported that all team members had taken on additional responsibilities, including security and volunteer management, describing the result as 'unnatural ranges of job descriptions' (Interview 7). One interviewee in Cambridgeshire reported undertaking a variety of tasks that were not in the job description. However, they expressed doing them fairly willingly due to the opportunity to gain skills (Interview 6). Similarly, front of house staff in Elmbridge appeared to take on additional responsibilities in response to the collections review, which may have benefited them in terms of skills and experience (Elmbridge Borough Council, 2011b). The ACE study on LAM resilience highlighted that staff must be willing to work across different activities (TBR et al., 2015: 26), and the interviewee at CIMS argued that it was reasonable to expect multiple skills of museum employees due to the number of people that wanted to work in the field. CIMS created a role of Collections and Learning Curator requiring both curatorial and communication skills (Interview 9).

Finally, while the museums sector is known for low wages, the current situation may exacerbate the situation: despite a 2-3 day per week temporary contract and a salary of £17k pro rata per annum, the curator role advertised for the Cromwell Museum was expected to have a post-graduate qualification, 3-4 years of experience and be working towards their AMA. Cambridgeshire County Council was told that the role would be competitive (Julie Cole Consultancy, 2014). However, the interviewees for Elmbridge Museum reported that they had failed to attract qualified candidates for a manager role, and they felt this was due to the short term nature of the contract on offer (Interview 3; Interview 4).



### *Types of Roles Gained*

Fundraising, marketing and income generation were the main areas in which new roles were visibly created and this supports the findings of the MA cuts survey (Evans, 2013: 11). For example, St Albans Museums intended to recruit a fundraiser to increase fundraising capacity, Bath Heritage Services appointed new managers for fundraising, sponsorship and management, and Leicester recruited a commercial development manager (Bath & North East Somerset Council, 2015b; Bath Heritage Services, 2015c; Interview 2; St Albans City and District Council, 2013). These roles were expected to deliver income, such as in Worcestershire where the new marketing and audience development manager was intended to become self-financing (Worcestershire County Council, 2012a).

Holmes and Hatton argue that the museum sector is resistant to influence from outside it, but also that managers from other sectors are unable to understand the nature of museums (Holmes and Hatton, 2008: 114). In TWAM, an 'enterprise team' had been formed to focus on income generation. The interviewee reported that only one member of the team had a commercial background, suggesting that the remainder may have more traditional museum backgrounds, but that the team had been extensively trained and knew what they were doing (Interview 13). Potentially, a museum background complemented by rigorous commercial training could enable the development of staff who understand the specific nature of commercialisation in museums.

### *Change in Contract Types*

Janes recommends reducing staffing, considering it more efficient to temporarily hire specialists when needed than to keep them on payroll (Janes, 2013a: 288–289). Davies reports that there is a trend towards short term contracts, giving the example of York Museums Trust where subject specialists are increasingly hired temporarily – or work voluntarily – to do a specific piece of work. Davies argues that this provides flexibility for the museum (Davies, 2011: 19–20). The 2012 Heritage Counts report provides another example, that of Beamish Open Air Museum where management posts were reduced and instead flexible contracts were increased in line with seasonal opening hours (English Heritage, 2012: 8). Examples of short term contracts and project-based working from my study include a two year collections project at Bath (Bath Heritage Services, 2014), posts created in Blackpool due to winning round one HLF funding (Blackpool Council, 2014e, 2014a), a 3 year externally funded collections post at the Grundy Art Gallery (Blackpool Council, 2014e), an externally funded part time marketing officer to promote public programmes (Blackpool Council, 2015b), an

interim museum project officer to manage the process of devolution to Trust for the Cromwell Museum (Cambridgeshire County Council, 2015), and an assistant exhibitions officer in Epping Forest funded by Renaissance (Epping Forest District Council, 2008c).

Short term contracts are not a new phenomenon in museums: in 2001 Feist reported that full-time permanent employment was the exception rather than the rule in the cultural sector overall, and that flexible jobs were increasing (Feist, 2001: 195). However, interviewees perceived that the proportion of short term contracts had increased. For example, in Worcestershire, one interviewee felt that project based-funding had increased and that therefore consultancy and temporary contracts had increased as organisations could pay to bring expertise in temporarily but could not retain them on a permanent basis (Interview 10).

Both Davies and Friedman argue that the biggest risk of reducing in-house capacity and finding grant for short term contracts is the loss of knowledge within the organisation (Davies, 2011: 19–20; Friedman, 2007: 7–8). Friedman warns that museums will be unable to sustain their intellectual values and will have to rely on popular travelling exhibitions (Friedman, 2007: 7). In addition, this strategy may be counterproductive as a museum with little in-house capacity will need to collaborate with others but will have little to offer potential partners in return (Friedman, 2007: 7–8).

### *The Role of Volunteers*

Overall Heritage Counts 2012 seems to recommend increasing the use of volunteers in heritage organisations. It notes that volunteer numbers have risen in recent years, with the National Trust nearly doubling its numbers between 2002 and 2011-2012, where volunteers already outnumbered paid staff 10 to 1 in 1998-1999, and that the importance of volunteers is now recognised through two award schemes (Creigh-Tyte and Thomas, 2001: 226; English Heritage, 2012: 25-26). The HLF describe volunteering as a 'vibrant expression of active citizenship' (Heritage Lottery Fund, 2013b: 4). Rhoden posits that a good reason for utilising volunteers is that they are usually enthusiastic for the field in which they are giving their time, and their enthusiasm enhances the experience of visitors (Rhoden et al., 2009: 20).

The ACE study of LAM resilience found that accredited LAMs have almost half the number of volunteer hours per FTE of the average across accredited museums, suggesting that there is room for increased use (TBR et al., 2015: 11). In my study I was unable to gauge whether the use of volunteers had increased overall but increased use was recommended by councillors, including in Epping Forest and St

Albans (Epping Forest District Council, 2011b; St Albans City and District Council, 2010c). The Victoria Art Gallery in Bath specifically reported recruiting volunteer guides in response to the need to make savings (Bath Heritage Services, 2015c). Though it was not clear if they replaced paid staff in this case, the MA survey found that volunteers were increasingly being used instead of paid staff in front of house roles (Evans, 2013: 11). It was evident that volunteers were used in a wide variety of capacities. Of particular note was reliance on volunteers in collections documentation (e.g. Bath Heritage Services, 2014; Elmbridge Borough Council, 2010; Epping Forest District Council, 2014d).

English Heritage stresses, though, that reliance on volunteers is not straight forward and that organisations must think about the motivations of their volunteers in order to develop roles tailored to individuals, while training paid staff to co-ordinate the volunteer workforce (English Heritage, 2012: 8). Rhoden echoes this view, describing how volunteers must be managed as if they were paid staff, and explaining the difficulties of finding specialist skills (Rhoden et al., 2009: 20). Babbidge estimates that even a very small volunteer-run museum needs around 5000 hours of volunteer time per year, which as on average each volunteer will work half a day a week, necessitates 40 volunteers (Babbidge, 2009: 2), which is significant in terms of recruitment, training, management and retention. The more volunteers you have the more you require full time paid staff to co-ordinate them and to provide continuity for the management of the organisation (Babbidge, 2009: 15).

Issues with the impact of volunteers on staff were found at a number of sample LAMs. For example, the Fashion Museum in Bath reported needing to cut down on volunteers due to the support they required and therefore draw on staff time (Bath Heritage Services, 2014). The service reported considering targeting resources on internships instead (Bath Heritage Services, 2014). Similarly, the interviewee in Leicester noted that they had to be careful about volunteer numbers to ensure that staff could cope with them and the interviewee at Saffron Walden Museum reported difficulty in utilising volunteers for collections work due to the unavailability of staff to supervise (Interview 2; Interview 7). However, it was noted that Uttlesford Council recommended they use more volunteers:

It's that 'oh, we can get volunteers to do that,' and I say no, your ability to use volunteers [...] is that you've got to have sufficient staffing to manage, train, recruit, organise, monitor, and work alongside volunteers. If you cut your staffing you cut your capacity to bring volunteers in. (Interview 7).

To enable the use of volunteers, services required dedicated staff to manage them. Both Birmingham and Leicester report establishing dedicated Volunteer Co-ordinator posts to enable better co-ordinated and extended use of volunteers, and an interviewee for Museums Worcestershire reported that this was under consideration (Birmingham City Council, 2011a; Interview 2; Interview 11). In Leicester they cut from the outreach team to fund this new role (Interview 2). In addition to these management issues, Dartford Museum found it difficult to enforce service standards with volunteers and Elmbridge Museum found it difficult to find and retain volunteers with appropriate skills (Dartford Borough Council, 2008b; Elmbridge Borough Council, 2014).

The Cromwell Museum Trust was set up to rely heavily on volunteers, having only one paid part-time member of staff. While the council was assured that museums are popular with volunteers (Julie Cole Consultancy, 2014), the museum's Friends organisation noted that they had been flagged as an automatic source of volunteers when in practice many of them were not willing or able (Friends of the Cromwell Museum, 2014). They noted that employment regulations, training, management and administration may be an issue (Friends of the Cromwell Museum, 2014). The interviewees in this case study expressed concern about the reliance on volunteers. For example, the museum Trust aimed to produce more events, but it was unknown who would organise and run them (Interview 1; Interview 6).

Overall, volunteering was clearly important to the sampled LAMs but there was concern about their ability to support volunteers in the face of reduced paid staff, and concern about the capacity of volunteers to cover core museum activities consistently and to the same standard as museum professionals.

### *Impact on Staff Morale*

The interviewee for Birmingham credited staff with the success the service had so far in managing cuts:

When you see reductions of that many staff and yet the visitor numbers and the trading income and visitor satisfaction all continue to grow, that's because you've got really good people. (Interview 14).

A positive spin was also put on the report to the council, with it stating that the short term uncertainty for staff would ultimately result in 'increased empowerment of staff and increased job satisfaction' (Birmingham City Council, 2011f).

Nonetheless, the interviewee conceded that the situation had been very stressful and that staffing was at a critical level (Interview 14). In Museums Worcestershire one

interviewee expressed a similar view that while the cuts had been incredibly stressful for staff, they had given some opportunities that they would not otherwise have had:

I think it has made some careers because there are more opportunities [...] you've got enormous amounts of stress but the job you've always dreamed of, because you can do more than one job these days. It's also meant that job descriptions are so broad that there is no pigeon-holing anymore, people have a chance to try all sorts of things. (Interview 10).

### **7.3.3 Collections**

#### *Collecting*

Where collecting was mentioned in organisational documentation, it was usually associated with having secured external funds. For example, Doncaster Museums Service reports having no acquisitions budget and acquiring new items only by donation or through external grants, and Epping Forest District Museum reports an acquisition on one occasion due to external funds (Doncaster Metropolitan Borough Council, 2012a; Epping Forest District Council, 2009e). Funds set aside for acquisitions at the Cromwell Museum were redirected to facilitate the change in governance, despite protests from the Friends of the Cromwell Museum that this was inappropriate (Cambridgeshire County Council, 2014b). Generally it is clear that the sampled LAMs have little funding available to collect.

Collections policies, however, varied. Some expressed that collecting would only be in exceptional circumstances and once the consequences for the existing collection were considered (e.g. Doncaster Metropolitan Borough Council, 2012a). However Birmingham Museums Trust states that collecting is important as it ensures that the collection remains 'relevant to, and reflective of, contemporary society.' (Birmingham Museums & Art Gallery, 2008a: 2009–13). As a result, the service does have a purchase budget, and supplements it with external funds (Birmingham Museums & Art Gallery, 2008a: 2009–13).

#### *Storage*

The storage of collections was highlighted as a specific problem by three of the sampled LAMs. It was apparent that finding suitable properties to use as stores was difficult e.g. (Elmbridge Borough Council, 2014; Interview 7), but in particular that LAs demanded compromise from the LAMs. For example, one interviewee for Elmbridge Museum felt that the new store was 'not quite right' and lacking in space, and the interviewee for Saffron Walden Museum expected the size of the new store to be

problematic (Interview 4; Interview 7). Both Elmbridge Museum and Saffron Walden Museum found that plans for storage kept changing, with the collections interviewee at Elmbridge reporting that they had been asked to prepare for 14 different collections move schemes over 8 or 9 years (Interview 4), and the Saffron Walden interviewee reporting that securing their new store had taken 10 years (Interview 7).

An interviewee for Museums Worcestershire was concerned about storage in the future. They expected storage space to decrease at the end of the current 10 year lease and report that the service's curators were working through potential scenarios so that they were prepared to address this if it came to fruition (Interview 10).

Committee papers show that sharing stores in the region had been considered but an agreement had not been reached with other LAs (Worcestershire County Council, 2014b). These examples suggest that museum stores are not considered a priority by LAs and that LAMs may need to face the issue of space sooner rather than later.

### *Review and Rationalisation*

The ACE study on LAM resilience notes that LAMs generally own a larger part of their collection than independent museums, which rely more on loans (TBR et al., 2015: 11). Collections have grown since the 1990s and both academic and sectoral commentators suggest that it may be necessary to be more discerning about what is collected and retained (Harrison, 2013: 219; Lees, 2009: 1, 5–6).

Janes reports that deaccessioning objects that were considered irrelevant to the current mission Glenbow Museum was used to create an endowment (Janes, 2013b: 37). None of the sampled LAMs in this study took that approach, but disposals were regularly reported. In all cases, the organisational documentation clearly expressed that the disposals took place following the appropriate procedures (e.g. Bath & North East Somerset Council, 2010b; Doncaster Metropolitan Borough Council, 2012a; Elmbridge Borough Council, 2011a; Tyne & Wear Archives & Museums, 2012b).

Reviewing and rationalising collections was associated with ensuring that the museum could care appropriately for what remained. For example, Bath authorised the disposal of some items that did not meet the collections policy, and reported that this enabled a more efficient use of museum resources (Bath & North East Somerset Council, 2010b).

In other cases, reviewing and rationalising collections was framed as making sure that the collections were relevant to the museum's priorities. These tended to be ensuring that the collections had local significance. This was the case for Doncaster Museums

Service and Elmbridge Museum, for example (Doncaster Metropolitan Borough Council, 2012a; Elmbridge Borough Council, 2011a; Interview 4).

### *Staff Time*

Two of the sampled LAMs in particular expressed that it had been difficult to prioritise time for collections work. In both cases, having moved stores and needing to update documentation, staff felt that they did not have time to dedicate to this and that the need for it was not understood by the wider council (Interview 4; Interview 7).

Documentation backlogs were common in the sample and were usually tackled by bringing in additional staffing either by finding external funding or utilising volunteers, such as in Bath and Welwyn Hatfield (Bath Heritage Services, 2014; Welwyn Hatfield Borough Council, 2011c). The interviewee considered external funds and additional staff needed to get the new store organised and documentation up to date in Uttlesford (Interview 7). In Elmbridge, the enquiries service was staffed by volunteers and had to go on hold due to logistical issues in bringing volunteers in. Staff said they did not have the time to do this work without extra help (Interview 4). They noted that disposals had stalled due to lack of staff time to process them and that external funds were needed to complete the work (Interview 4).

## **7.4 Discussion**

In this chapter I summarised the case study LAMs as a foundation for detailed analysis in the following chapters. I then started to look at their situation in relation to fiscal austerity. Firstly, I found that the majority of the sample have weathered cuts in expenditure from their LA and also been affected by cuts in other areas of the LA, either by indirectly reducing expenditure on particular services (such as IT in Leicester), or by passing work on to the LAM without providing the associated resources (such as HR in CIMS). The latter in particular makes it harder for the LAM to manage with their direct cuts. Constrained spending in other sectors, such as schools, has had an effect on LAM income. I also found that the speed of cuts and uncertainty over the future have made it difficult for LAMs to plan strategically.

In terms of supporting bodies, the abolition of the MLA had an impact on access and education work, but recipients also criticised the lack of strategy in the Renaissance scheme and reported that it hindered planning. While there were concerns about ACE's understanding on museums, no specific examples were evident of the effect of ACE in this regard. Those in contact with ACE reported that they had been generally supportive so far in relation to difficulties that the LAMs had faced in the economic

climate, and many of the cases had received funds from them. However, ACE have already weathered cuts to their budget and it is possible that they will face more, reducing the support that they can provide to LAMs.

I looked at the impact of austerity in key areas of LAMs. Firstly, while there were cases of reduced opening hours this was often done pragmatically to bring them in line with other services, such as an adjacent library, or to better suit visitors. In some cases there were increased opening hours. There was not a clear trend to reduced access.

Many cases report cuts to staffing. In particular, there was concern about the loss of curators, conservators and learning staff in comparison to increases in fundraising, marketing and other commercial roles. Staff were generally expected to have more skills and take on more responsibilities, in particular with more staff being involved in fundraising. There was a perception that short term contracts associated with projects and grants had increased, though this could not be substantiated. There were cases of increase and decrease with regard to volunteers, the latter due to lack of staff time to manage them.

Where new collections policies had been produced during the period under examination they show an aversion to collecting. Some cases describe concern about managing their collections, both in terms of storage space and staff time to work on them. Further, it was expected that storage space would become more constrained over time. Rationalisation of collections often had a focus on retaining only items of local significance. While this is understandable for a small regional museum, it means that there is a decline in wider material being available and a loss of access to locals.

A common definition of sustainable development is relevant here – sustainable development is that which meets the needs of the present without compromising the ability of future generations to meet their own needs (Stylianou-Lambert et al., 2014: 567). The relevance of this concept here is in relation to collections and staffing: the challenges of austerity have solutions in the present, but they may compromise the access of future generations. In particular, the loss of knowledge through loss of curatorial staff and the risk to collections from smaller stores means that while museums are coping with the present situation, they are potentially jeopardising the long term. Further, while temporary or project-based staff funded by grants makes sense for the current constraints, it will not be sustainable if there are not sufficient internal staff to actually bid for the grants in the first place.



## **8 Museums within Local Authorities**

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In this chapter I explore the nature of museums within local authorities as evidenced by the data collected in this study. I draw out the benefits and drawbacks of being part of local government and the influence of policy on museum operations. As such I will understand how being a LAM shapes the response to fiscal austerity. This is particularly important as there has been limited academic research into the nature of LAMs, making this a novel contribution to the study of museum management. I discussed the existing literature in Chapter Four, and this chapter adds considerable detail.

Firstly, I look at the structure of LAs and how this affects LAMs. I consider the place of LAMs within LAs, the decision making processes of LAs, and the systems and procedures common within LAs. I consider how this helps or hinders the museums. I then look at the relationship between LAs and LAMs by analysing how the aims and performance of the museums are presented in organisational documentation. I compare this to how the relationship is perceived by museum employees, using the interviews conducted for this study.

The main result of this chapter is the finding that LAs and LAMs have an imperfect relationship, with an unsteady balance between necessary support and challenging bureaucracy. Whether LA support helps or hinders LAMs depends upon the individual museum. I find that LAMs are often adept at fitting in to different LA departments and contributing to LA aims on paper, and that doing so does not overtly influence the activities undertaken in the museum. However, fitting in is more likely to have a positive impact on the way museum staff view their relationship with and role within the wider LA, than to shelter the museum from cuts. The LAMs most actively valued by their LA have a real or perceived economic impact on the locality, and while other aspects of LAMs are valued, they are challenging for LAs to support.

### **8.1 The Structure of Local Authorities**

#### ***8.1.1 The Impact of Hierarchy and Committees***

Griffin finds that museums tied to governments are less effective than those that are independent. This is due to oversight from the government reducing the ability of the museum to make decisions (Griffin, 2008: 50). Bureaucracy in local government is heavy-handed and information must cascade up the hierarchy, making decision-making long-winded and individual rules hard to change (Teece et al., 2016: 24; van

der Voet, 2014: 376). The hierarchical committee structure comes from the need to be accountable to the public and to the national government, and therefore the need to demonstrate structured decision making (van der Voet, 2014: 374). This structure is suited to stable conditions: the need to be accountable means that risk tends to be avoided, whereas uncertain conditions require innovation and risk taking, making decentralised decision-making more suitable (van der Voet, 2014: 376). As such, LAs can find it difficult to be responsive to changing environments.

### *Distance from the Top*

The hierarchical structure of LAs means that it is difficult for information from the lower rungs to reach the top undistorted (Teece et al., 2016: 24). This means that the decisions made will not necessarily reflect the reality of the operational situation. Smaller LAMs face particular challenges in engaging with council members; as they lack capacity, expertise and authority (Mansfield, 2014: 29). For example, the interviewee from Saffron Walden Museum reported being the fourth tier down in departmental hierarchy and having little opportunity to meet and speak to councillors (Interview 7). They report difficulty in getting councillors to engage with the museum, a feeling of being misunderstood, and the impression that they are a low priority for the LA (Interview 7). In comparison, the director of TWAM reported being able to maintain relationships with senior management and councillors due to their own seniority (Interview 13).

The New Local Government Network argues that the concern for smaller museums without the capacity to regularly engage with council members is that they miss out on the opportunity to find out how to align themselves to local priorities in order to remain relevant and competitive in the funding landscape (Mansfield, 2014: 29). Overmans and Noordegraaf argue that during austerity, budget setting becomes more competitive and dependent on power relations due to the increase in 'losers' (Overmans and Noordegraaf, 2014: 99). This means that engagement with LA priorities and the capacity to influence councillors is critical if LAMs are to be 'winners' in the budget setting process. In terms of funding for these cases it is not really appropriate to directly compare the finances of the two organisations due to their different scales. Nonetheless, it is worth noting that TWAM have lost a greater proportion of their LA income than Saffron Walden Museum despite their reported greater engagement and influence within the LA. The difference, then, seems to be more associated with the understanding shown by the LAM of the LAs situation:

[...] the reality is that local authority members are making decisions that I wouldn't want to have to make. I'm on the receiving end of them as a local authority senior officer, but they're making horrible decisions and I think it's my job as much as I can to support those cabinet members, those councillors, to provide them with good advice. (Interview 13)

There is no clear pattern around which interviewees report understanding their LAs position and those that express feeling marginalised. For LAMs where interviews were conducted, there initially appears to be a correlation between the grade of the individual interviewed and this level of understanding, with the more senior members of staff expressing understanding and officer level expressing marginalisation. However, this does not hold up to scrutiny as the interviewee at Birmingham Museums Trust was a senior member of staff and perceived that their relationship with the LA was poor (Interview 14), and the interviewees at Museums Worcestershire were officer and assistant level:

Nobody wanted us to be in this position and people are very supportive [...] The cuts are going to have to come from somewhere: if you don't take them somebody else will have to take them. (Interview 11)

It could relate to the scale of the museum, as the majority of those that expressed understanding were in the middle and the top of the sample in terms of LA income, such as CIMS, Museums Worcestershire, Leamington Spa Art Gallery and Museum and Leicester Museums (Interview 2; Interview 5; Interview 8; Interview 9; Interview 11). Whereas interviewees from the museum with the lowest LA income in the sample, Elmbridge Museum, felt misunderstood and marginalised by the LA (Interview 4). However, Birmingham Museums Trust is again an anomaly, being the largest museum in the sample. On the other end of the scale, Welwyn Hatfield Museums Service is a smaller service where cuts were framed as being the service's contribution to the wider situation rather than an unfair burden (Welwyn Hatfield Borough Council, 2011a).

### *Location within the LA*

In Section 2.2.3, I found commentary expressing concern about the department the museum sat in having an impact on its direction. The same concern was raised by interviewees in my study:

[...] you might sit in a children's services area, there's a risk that everything could be focused towards that... same with if you were in an

economic development area... So I think that can be a risk, that the cross-cutting nature gets somewhat lost. (Interview 13)

In Chapter Two, I found that LA history resulted in LAMs sitting in different places within LAs, and certainly in my sample, the LAMs were in a wide variety of departments. Dartford Museum is in the Regeneration/Project Delivery team (Dartford Borough Council, 2007c), whereas Epping Museums Service sits in the Leisure and Wellbeing portfolio within Community services (Epping Forest District Council, 2009d, 2014b: 2017), and Warwick District Council had a specific culture department, also running leisure centres and arts venues (Interview 5). Further, the sampled LAMs had different opinions about where it was appropriate for them to sit. The interviewee for Leicester Museums felt that being situated within the economic development and regeneration agenda was beneficial for their survival, whereas for a Museums Worcestershire interviewee, sitting in with Children, Family and Community Services was deemed appropriate due to the relationship between museum and learning (Interview 2; Interview 11). The Museums Worcestershire interviewee talked about the service getting involved in social work and the LAs prevention strategy, but also about having a role in economic development through tourism (Interview 11). Conversely, in Leicester, the interviewee argued that contributing to economic development was associated with community services (Interview 2). Similarly, in Blackpool, cultural services sits alongside economic development, but organisational documentation showed that the Grundy Art Gallery was well integrated into LA events and programmes with an access and inclusion theme, which is a separate directorate (Blackpool Council, 2010a, 2011a, 2011b, 2014e). Overall, there was no clear influence of structure on LAM focus, and there was also no particular advantage to a particular structure apparent over all the sampled LAMs.

Reorganisation was a regular occurrence within LAs and LAMs were affected by this. For example, Museums Worcestershire had recently moved to the Children, Families and Communities directorate, having previously been in Business, Economy and Communities, and were anticipating a move from Worcestershire County Council as their host to Worcester City Council (Interview 11). Saffron Walden Museum had moved around in the council structure and had sat in places that felt inappropriate to the interviewee:

I think, you know, they've never been quite sure where to put the museum, so there was a culture and sort of leisure and amenities department... Then there was a reorganisation, we went into environmental services, so in team meetings I'm sitting round the table

with people doing things like checking food and markets and Stansted airport and street services. It just didn't fit. And then there was another reorganisation and we ended up in corporate services... we're in with printing and sort of various council services which effectively don't fit into housing, planning or the environmental side. (Interview 7)

The impression given is that LAMs do not easily fit into the structure of LAs, but that their ultimate location does not have a clear impact on their activities. Certainly, organisational behaviour theory states that in larger organisations that have multiple functions, it is difficult for individuals within one section to have a focus wider than their section's boundaries and therefore they will focus on goals that make sense to them even if they do not fit within the wider organisation (Rollinson, 2008: 486). Further, in Section 4.1.3 I discussed the idea that cultural organisations exploit instrumentalisation for their own gain, matching government policy to their existing activities in order to leverage funding and support (Bunting, 2008: 323–324; Nisbett, 2013: 568). The evidence found in this study upholds this argument to some extent, suggesting that LAMs are able to describe similar activities in different ways to fit in to different departmental agendas. However, the LAMs appear to be reactive rather than proactive in doing this, using different ways of describing their activities to get by and make do with whatever department they are placed, rather than proactively instrumentalising their activities in order to better their position within the LA.

### *The Impact of Individuals*

Van de Voet et al. conducted a study on change in the public sector and concluded that forward planning is thwarted by the political complexity and varying interests represented (van der Voet et al., 2015: 296). A hypothesis that can be drawn from this is that, as well as needing senior staff who are able to navigate the political landscape, LAMs need powerful advocates to succeed. The idea that individuals are important to the fortune of museums is echoed in a report by the New Local Government Network: support for arts and culture within an LA depends on an influential individual having a particular interest in it (Mansfield, 2014: 7).

Differing levels of interest and support for museums was shown by councillors delegated to the relevant committees:

You end up with a governing body that's drawn from quite a disparate geographical area, who stood for election because they were interested and passionate about different things, suddenly finding themselves responsible for running something they knew nothing about. Whereas if

you have a board of trustees you can actually go out and recruit them to actually bring something to the table. (Interview 8)

An Interviewee expressed a similar view in Elmbridge:

[...] it seems like there are people who make decisions about the museum who aren't necessarily the best informed. (Interview 4)

The interviewee for Saffron Walden Museum felt that they were 'hostage to fortune' in terms of what the change of administration from elections would bring (Interview 7).

Change in leadership can be challenging for organisations: each new leader wants to make their mark and initiates changes which lead to inconsistent governance (Lindqvist, 2012: 6). Similarly, the TWAM interviewee noted that individuals made a difference to the committee and that some years there were individuals who were not interested:

If you think about the average local authority in the North East has 50, 60, 70 councillors, and there will be a few that don't like museums. (Interview 13)

In Leicester, the city mayor was elected in 2011 on a platform that included heritage and culture for regeneration. The interviewee perceived that the mayor believed in heritage as a way of helping local people feel proud of their identity, and claimed that the museums service had suffered cuts prior to his election, but had become more of a priority since (Interview 2). Interviewees generally agreed that interested councillors could act as valuable advocates for the service, with particular gratitude expressed for the active role the current councillors had taken in Worcestershire (Interview 8; Interview 10; Interview 13).

### *Type of Local Authority*

Evidence from the study suggests that LAMs struggle in larger LAs. In Birmingham, the interviewee mentioned that the LA was very large and had a lot of pressing responsibilities related to social care and inner city problems (Interview 14). They expressed the opinion that the objectives held by the LA for the service were not clear:

I don't think that has been fully articulated. We now have a memorandum of understanding, but I don't whether it's been seen or discussed within Birmingham City Council very widely. (Interview 14)

In Cambridgeshire, the interviewee found that the size of the LA added complexity to devolution:

[...] I guess one of the challenges with a big local authority like a county council is that you don't have all the people from different departments talking as closely together as you might do in a smaller local authority... and that [a small local authority] avoids the kind of messes and misunderstandings and having a stronger project board with more representation from those other departments I guess would have been more ideal. (Interview 1)

In comparison they perceived the town council in Huntingdon as having more of an interest in the service (Interview 1). Similarly, both interviewees from Museums Worcestershire, a joint service, perceived the city council as being a more appropriate home for the service. For them, the city council moved quicker and the county council was more procedural, being a much larger organisation. They felt that the museum had more connections within the city council due to it being possible for everyone to personally know each other, whereas it was difficult to build necessary relationships in the county council (Interview 10). They felt that it had been easier to make the case for the wider benefits of museums in the city council, and heritage had become one of the city council's top 5 priorities, whereas they thought that the county council would never be able to prioritise heritage due to their statutory obligations (Interview 10; Interview 11).

While Uttlesford District Council was the smallest LA in the sample in terms of spending, the interviewee expressed that it was the museum's geographic distance from the council offices and the fact that they were the only cultural service managed by the LA that made them feel like they were isolated with the LA (Interview 7). An anomaly was Warwick District Council. The interviewee from Leamington Spa Art Gallery and Museum reported that they were a small part of their department and somewhat isolated from the rest of the council, both geographically and in terms of integration with other services. However, they expressed that this was a positive arrangement due to lack of interference in their work (Interview 5). One explanation for this relationship is that the museum is housed in a building that is politically important due to being highly visible, representative of the town's history, and reportedly cherished by the community. The interviewee felt that the museum's tenancy of the building was secure due to the importance to the council in its use being maintained (Interview 5).

## **8.1.2 The Compatibility of Systems and Ways of Working**

### *Hindrance of Communications*

Interviewees felt that Local Authority restrictions hindered the branding and marketing of LAMs. For example, the service in Bath must have the council logo on all signage and materials and had not been allowed a bespoke logo for some time despite the international brand of the Roman Baths (Interview 8). On a smaller scale, both interviewees for the Cromwell Museum thought that communications were held back by LA governance, as the service was unable to promote itself through social media such as Facebook and Twitter and was not able to update webpages themselves (Interview 6). In Uttlesford, the interviewee considered the council website inappropriate for Saffron Walden Museum due to not being interactive or audience friendly. Though a bespoke website had eventually been granted, it had been challenging to persuade the council to allow it due to policy for a uniform approach to webpages (Interview 7; Uttlesford District Council, 2014b). Still, staff in Saffron Walden Museum were not allowed to edit the website themselves, even to update basic information such as the activity programme (Interview 7).

### *Limitations of Systems*

Local Authority systems are not ideal for LAMs. For example, in Bath the interviewee found the HR system challenging as it was not appropriate for staff working outside of normal office hours (Interview 8). Both Bath and TWAM interviewees reported that the financial systems available to them were incompatible with their need to generate income, as traditionally LA accounting focuses on monitoring expenditure rather than sales. For example, LAs use brackets in the opposite way to accounting in other sectors, with brackets representing income rather than expenditure (Interview 13). The systems were reportedly designed to make it harder to spend money, which was challenging for LAMs tasked with generating more of their own income. This resonated particularly for Bath where the service had challenging profit targets (Interview 8).

Local Authority Museums were tied in to LA procurement contracts. For example Bath's utilities were provided by corporately negotiated contracts, which were intended to minimise costs across the LA overall, but resulted in an increase for Heritage Services (Bath Heritage Services, 2010).

On the other hand, interviewees from the smaller museums reported reliance on centrally provided LA services, such as payroll, as they considered themselves too small to hold these in-house (Interview 7). In moving to Trust status, the Cromwell



Museum was finding that there were a large number of things that they had to find an alternative way of acquiring, from IT services to electrician support. These would be more expensive and more complicated to deliver outside of a large organisation (Interview 1). While LA systems are not ideally suited to museums, then, the compromises may represent better value for money than bespoke systems at certain scales.

### *Local Authority Financial Support*

Local Authorities are able to support services through more than simply distributing their core budget. For example, LAs can choose to charge taxes to tourists through hotel bookings and direct this money to organisations involved in tourism. Wilkerson argues that this avoids taxing residents, and while visitors do not like the taxes they accept them and continue to visit (Wilkerson, 2012: 107). Throsby also recommends taxes on tourists as a way of securing revenue for organisations, such as museums, that have public good aspects. Throsby also notes that this secures access to the resources for local residents too (Throsby, 2010: 151). Liverpool City Council is considering using this approach (Bazalgette, 2016: 6), however none of the case studies had recently employed the strategy.

The LAMs in the sample did receive other kinds of financial support for their LA. For example, many secured premises at a peppercorn rent that they would not be able to afford at full market value. The Cromwell Museum had leased its building from Cambridgeshire County Council and ownership of the building was transferring to Huntingdon Town Council who intended to continue the peppercorn rent agreement (Huntingdon Town Council, 2014a). In some respects, this was a good arrangement for the Town Council as it led to the use of a building that was unsuitable for other purposes. The Cromwell Museum building has no running water and therefore no toilets, and would be difficult to use in a different way (Interview 6), but is in the middle of the town and therefore would be noticeable if it was left vacant. Similarly, as described previously the interviewee at Leamington Spa Art Gallery and Museum considered their position to be strong due to occupying a historic building that represented the image of the town (Interview 5).

### *Impact of Wider LA Events and Initiatives*

A wide variety of events affect LAMs that an independent museum may be able to avoid. For example, as part of LAs, the LAMs are subject to the public sector rules and

Bath has to comply with changing employment terms, which resulted in back pay and increased pension contributions (Bath Heritage Services, 2010).

In Worcester, the City Art Gallery had been affected by the move of the city library, leaving a vacant a space within their building. This resulted in a downturn in their visitor numbers as well as uncertainty about the future (Interview 10). Ultimately the council decided to move offices into the old library space, and this was perceived by staff as making the gallery's tenancy of the building more secure (Interview 10; Worcestershire County Council, 2014b). They felt that under different economic conditions, the museums service may have been able to take over the entire building (Interview 10).

On a smaller scale, staff at Elmbridge reported struggling with council-wide initiatives, such as paperless working, which they found challenging for a museums service (Interview 4). They felt that such initiatives take staff time away from core museum activities and that the council imposed conflicting priorities on them (Interview 4).

## **8.2 The Purpose and Interests of Local Authorities**

### ***8.2.1 How the Purpose and Value of Museums is Described***

There were two distinct ways in which the value of museums was discussed in LAs, though the two are related: quality of life for residents and economic development. The former can be further divided into intrinsic and instrumental values.

#### *Quality of Life and Well-Being*

The value of museums was often described intrinsically, both in organisational documentation and by interviews, in terms of providing inspiration for visitors and generating local pride. This is shown in the proposed mission statement for then newly formed joint service, Museums Worcestershire:

We aim to enrich the lives of people from Worcestershire and beyond.

We want to inspire them to deepen their knowledge of the city and county and make sense of this world. We will do this by sharing our passion for the unique art, artefacts and stories that have shaped the identity of Worcestershire and its county town for over 2000 years.

(Worcestershire County Council, 2011c)

In Leicester, heritage was associated with local identity in relation to the diverse population of the city and committee papers state that enjoying local heritage gives residents confidence, pride and a sense of belonging (Leicester City Council, 2012b). For CIMS, the service's objectives include generating pride, inspiration and fun for

diverse peoples locally and more widely (Colchester & Ipswich Museum Service, 2009b; Colchester Borough Council, 2013c). Leamington Spa Art Gallery and Museum's statement of purpose is:

To provide opportunities for everyone to benefit from, enjoy and participate in the creation, interpretation, and preservation of the Arts and Heritage. (Leamington Spa Art Gallery and Museum, 2012a)

The stated aims for Bath include reference to the wider council aim of creating 'neighbourhoods where people are proud to live'. They report achieving this by providing free access for residents, meaning that individuals are able to gain a good understanding of the history and heritage of the area, and by promoting opportunities to get involved in activities across the area (Bath & North East Somerset Council, 2012a: 13). They argue that this is why they must support non-LA museums in the region (Bath & North East Somerset Council, 2012a: 13).

However, in all cases the intrinsic values of the museums services were associated with instrumental gains, in documentation at least. For example, in Leicester, the value of engaging local people in local heritage is that it is:

[...] part of creating a cohesive, tolerant city, rooted in a strong sense of place. (Leicester City Council, 2012b)

As such, the intrinsic goodness of participating in museums is instrumentalised as helping improve communities. In Blackpool, culture was aimed at improving quality-of-life for residents through ensuring the town is 'safe, clean and pleasant', and through supporting the improvement of educational achievement and skills (Blackpool Council, 2009a). As such, intrinsic quality-of-life is instrumentalised as increasing educational attainment. Similarly, Birmingham Museums are associated with quality-of-life for residents through their role in providing education and development opportunities for residents (Birmingham City Council, 2011a, 2012a; Birmingham Museums & Art Gallery, 2009a).

Ander et al. argue that museums have an opportunity to engage with the rise of a 'wellbeing agenda' in local government, simply by using the appropriate terminology to describe the work that they already do (2011: 237). Indeed, well-being was a commonly used term. For example in Leicester, culture was stated as being essential for the health and well-being of children (Leicester City Council, 2008a). The development of a new museum for St Albans was related to the health and well-being of the community (St Albans City and District Council, 2009, 2010d). Hackney Museum is described in organisational documentation as 'engaging heavily in the health and

well-being agenda' (Hackney Council, 2011a). Well-being is also stated aim for Leamington Spa Art Gallery and Museum (Warwick District Council, 2012b).

The smallest museums in terms of LA funding focused on local people rather than the wider visitors mentioned in larger services. Dartford Museum's purpose was described as being for the benefit of the community through helping residents understand how their locality had developed and to help the maintenance of a community identity in the face of social change (Dartford Borough Council, 2008b). The documented aims of Saffron Walden Museum relate to providing inspiration and sense of place for local people (Uttlesford District Council, 2014a), and in Epping Forest, the museum was described as a 'springboard' to provide an outreach and education service to the district (Epping Forest District Council, 2008d). Focus was on residents, with the service reported as contributing to local quality of life (Epping Forest District Council, 2009b). Tourism and its income potential were mentioned only in relation to the expectation that visitor numbers to the area would increase with the 2012 Olympic Games, and the museum's vision statement discusses 'serving the community' without mention of income generation or connection to serving through economic benefit (Epping Forest District Council, 2009b, 2014b). The focus for the reconfigured service at Elmbridge Museum was entirely on the local community (e.g. Elmbridge Borough Council, 2014). The mission statement suggested was:

Engaging people with their past, present and future by collecting, preserving and presenting selected and significant objects from the history of Elmbridge, for the purposes of learning and enjoyment.  
(Elmbridge Borough Council, 2011a)

### *Economic Development*

The economic development potential of museums was often said to be through tourism. For example, CIMS and Birmingham Museums are both associated with economic development through tourism (Birmingham City Council, 2011a, 2012; Colchester & Ipswich Museum Service, 2009b; Colchester Borough Council, 2013c). In St Albans, heritage tourism was mentioned as a key economic contributor nationally, with the city of St Albans holding special historic significance (St Albans City and District Council, 2012c). As such, the museums service contributes to economic development through developing tourism (St Albans City and District Council, 2009, 2010d). Contributing to the tourist economy is also mentioned in Warwick (Warwick District Council, 2012b). In developing Nottingham Castle, stated aims are related to economic regeneration through the creation of a 'world class heritage attraction', to fit

in with the council's plan for growth and tourism (Nottingham City Council, 2013). Objectives in Blackpool include regeneration through developing the visitor economy by 'creating high quality, all year-round reasons to come to Blackpool' (Blackpool Council, 2009a).

Economic development was also an advance on the quality-of-life aim of creating pleasant places to live, being associated with creating an environment that is attractive to businesses. For example, promoting heritage in Leicester was expected to attract people to visit, live in and do business in the city (Leicester City Council, 2008a, 2012b). In Blackpool in particular, museums were associated with LA priorities around regeneration in a broad sense: generating income and jobs through tourism; generating income and jobs by creating an attractive place for people to live and work, therefore attracting investment and jobs; and raising aspirations for children and increasing their educational attainment, resulting in higher employment (Blackpool Council, 2015a). As a result, opening a new museum for Blackpool was reported as a priority for the Regeneration, Tourism and Culture Department and there is persistence in the LA working towards this aim following the failure of the V&A performing arts museum project (Blackpool Council, 2014a).

In Leamington Spa the interviewee said that museum had a role in the LA's desire to create a cultural or creative 'quarter' in the city (Interview 5). Documentation reported that the district needed to develop the 'quality of the public realm' to achieve long term success through tourism and investment, and the museum was mentioned as part of this infrastructure (Warwick District Council, 2010). The idea of a cultural quarter was also mentioned in Ipswich to include additional projects by the museums service in support of the cultural economy (Ipswich Borough Council, 2012b). The council wished to secure capital funding to develop the cultural property on the high street (Ipswich Borough Council, 2012a).

### *Relating Museums to Council Priorities*

The connection between the aims of the LAM and the LA was often stated explicitly in organisational documentation. For example, the development of a new museum for St Albans was related to corporate policies with a community theme, such as creating a fair and inclusive community, working in partnership for the health and wellbeing of the community, and to make the area desirable to live in (St Albans City and District Council, 2009, 2010d). Welwyn Hatfield Museums Service report that supporting and investing in heritage helps people to enjoy life in the borough, which is part of the LA's 2021 Corporate and Community Plan (Welwyn Hatfield Borough Council, 2011b). In

setting up the joint service, Museums Worcestershire also report an aim of fitting in with the priorities of each authority as well as the wider cultural sector (Rutherford, 2009). Even an updated collections policy for Birmingham stated that the policy would support a number of council priorities by ensuring the collection is world class and inspiring in order to support social, intellectual, emotional and spiritual needs (Birmingham Museums & Art Gallery, 2008a: 2009–13).

For CIMS and TWAM, aims and objectives were discussed in relation to those of funders beyond the LA as well (Colchester & Ipswich Museum Service, 2008a; Colchester Borough Council, 2013c; Interview 13; Tyne & Wear Archives & Museums, 2014b). For example CIMS aims to 'Engage with and respond to Arts Council Goals' (Colchester Borough Council, 2013c)

In Cambridgeshire, in discussing the future of the Cromwell Museum, a committee paper reported the impact of its closure against LA priorities. The museum was associated with the local economy due to attracting visitors to Huntingdon, however it was stated that there would be no impact on priorities around well-being, as has been seen at other LAs (Cambridgeshire County Council, 2014b). It would be interesting to know more about how this conclusion was reached and whether the museum's value could have been more closely aligned with the council's priorities.

### *Stewardship*

It was rare that the care of collections was specifically included in the aims and objectives of the sampled LAMs. Only three examples were found. That museums hold collections in trust for society is expressed by Bath:

By definition, the museum has a long-term purpose and holds collections in trust for society (Bath Heritage Services, 2013a)

Epping Forest Museum reports that acquisition and preservation for public benefit is a fundamental purpose (Epping Forest District Council, 2014a). Finally, in developing the statement of purpose for the newly formed joint service, Museums Worcestershire, an amendment was requested to ensure inclusion of the fundamental objective of the service being to preserve collections for the future (Worcestershire County Council, 2011c).

The relative absence of values expressed in this area may be that as behind-the-scenes services, LAs struggle to value stored collections. The interviewee for CIMS expressed that stored collections could be seen by LAs as costs with no visible outcomes, and therefore it is important to work to make collections a visible and

actively utilised asset (Interview 9). Interviewees in two cases expressed that they had a particular issue with LA understanding of professional standards for collections care. In Elmbridge, an interviewee thought that the council had a poor understanding of museum professionalism, meaning that staff found themselves 'battling with higher up' about collection needs:

[...] they're obviously trying to either justify the expenditure or reduce expenditure, but for the museum, you know, we can't be cutting corners.  
(Interview 4)

As described in Section 7.3.3, Saffron Walden Museum took 10 years to secure a new store. The interviewee felt that sorting out the new store and corresponding documentation was a priority as it was the 'building block' on which the rest of the service would be based, but felt that the council did not appreciate this (Interview 7).

#### *As Described by Interviewees*

The interviewees were asked to describe the value of the museum service they worked for. In most cases, they described the intrinsic value without instrumentalisation, in contrast to the organisational documentation which was always expanded to include instrumental value.

In Worcestershire, an interviewee talked about the museums being a constant in the face of change (Interview 12). In describing the value of Saffron Walden Museum, the interviewee described the museum's mission as giving a sense of local identity through history, culture and natural environment:

[...] sort of showcasing the district and hopefully giving them something to connect with and feel rooted. (Interview 7)

The interviewee in Leamington Spa also used the word 'showcase' to describe the museum (Interview 5). For TWAM, the focus was expressed to be on creating public benefit:

[...] the mission is not about collections, it's not about buildings, it's not about heritage sites. The mission is about people. Those collections [...] are really important, but they're the tools. (Interview 13)

It was further thought that the service has a social justice mission, that public funding enables it to deliver (Interview 13). In this case, in documentation the view is replicated, describing access as key and impact on people as of foremost importance (Tyne & Wear Archives & Museums, 2012d: 2011–2012).

Interviewees tended to focus on local people. For example, in Elmbridge an interviewee reported that the service was becoming more locally oriented by reducing the collection to items of local significance only (Interview 4).

[...] people do seem to like to identify with a place and we have got a lot of rich history to be able to offer them. (Interview 4)

Similarly, in Warwick the interviewee stated that as part of the council, whose goal was to serve the residents of the district, the museum's goal was to attract as many residents as possible (Interview 5). This view was furthered in Leicester, where the goal of attracting visitors from outside of the city was associated with benefits to residents:

We don't serve visitors who come from outside the city boundary, we use them [...] local authority museums are very much part of the function of the local authority which is to serve the people of that local authority. (Interview 2)

In that respect, the connection between the museum's objectives and the council's objectives were made clear:

Our aims and objectives are to deliver the council's aims and objectives and we find different ways of doing it. (Interview 2)

### *Discussion*

The New Local Government Network reports that economic development is more important to county councils than other authorities, whereas district councils are more likely to fund arts and culture for community cohesion (Mansfield, 2014: 7). Overall, they found instrumental values to be influential in LAs (Mansfield, 2014: 19). Using evidence of how museum values are described to LAs in documentation, I find that while museum values are often described intrinsically, these values were usually instrumentalised by connecting them to education, economic development, and health. The small museums that I found to focus on local people and local identity rather than economic value were all managed by shire districts, in keeping with the findings of the . While the only value ascribed to Cambridgeshire County Council's Cromwell Museum in organisational documentation was related to economic benefit, the situation for the other County Council case study, Museums Worcestershire, was more nuanced. Similarly, the Unitary Authorities and Metropolitan Districts showed variety and complexity, with local pride, quality-of-life, wellbeing, and economic development all intertwined.



## **8.2.2 How Performance and Value are Evaluated**

### *Visitor Numbers*

In all cases, committee papers show that performance measurement for LAMs includes visitor numbers (e.g. Bath & North East Somerset Council, 2011a; Birmingham City Council, 2011a; Blackpool Council, 2009a; Colchester & Ipswich Museum Service, 2009g; Dartford Borough Council, 2007c; Elmbridge Borough Council, 2010; Epping Forest District Council, 2009b; Hackney Council, 2010b; Interview 5; Interview 7; Julie Cole Consultancy, 2014). Online visits appeared to be valued too, such as in Epping Forest, where praise was given by councillors for an increase in online user numbers, despite stability in in-person visits (Epping Forest District Council, 2009b). Interviewees in both Bath and Uttlesford perceived that the council is interested primarily in visitor numbers and spend per visit (Interview 7; Interview 8). This is found in Elmbridge Museum, which was considered poor use of public funds by the council due to costing £33.76 per visitor in 2009-2010 (Elmbridge Borough Council, 2010). However, there was no detail of what an acceptable cost per visitor would be. Similarly, in Dartford committee minutes state that increased usage of the service would be equated as enhanced value for money, but what level they wanted was not stated (Dartford Borough Council, 2007c, 2008b).

Very little benchmarking was reported in the organisational documentation reviewed. The interviewee at Bath reported that they benchmark with competitors extensively, but there is little evidence in the documentation of this being reported to the LA and therefore it may be an internal exercise (Interview 8). Hackney Museum reports that its visitor numbers put it in the upper quartile of LAMs in London (Hackney Council, 2011b). Otherwise visitor numbers are generally reported only in comparison to previous figures and targets. As such, except in the case of Elmbridge Museum where poor value for money was used to justify the closure of the museum, there was very little evidence that LAs use performance measures in decision making.

This matches the conclusions of Davies and Selwood in looking at performance data collected by DCMS for its funded museums: the amount of data collected has increased over time but it does not seem to correlate to increases or decreases in revenue funding, suggesting that differing performance is not considered in the budget setting process (Davies and Selwood, 2012: 202). Similarly, while for Leicester Museums, the LA demanded detailed figures before approving the appointment of a commercial manager so that success could be assessed, I found no evidence of the

performance of the position being quantitatively appraised after appointment (Leicester City Council, 2012a).

Interviewees for Elmbridge Museum reported conflict between quantitative measures and quality of service (Interview 3). They felt that it was difficult for targets to address quality and that the 'target culture' of LAs was inappropriate for many museum activities:

[...] you can't just say 'I'm going to catch two moths this week. (Interview 4)

In Birmingham, the council's strategic objectives were linked to visitor number targets, but terms such as engagement, participation, opportunities and access were used in contrast to the overtly commercial terminology seen in Bath (Bath & North East Somerset Council, 2011a; Birmingham City Council, 2010a, 2011f; Birmingham Museums and Art Gallery, 2009). Complexity of performance indicators in Birmingham may be related to the number of stakeholders: the interviewee reported that indicators are based on DCMS indicators for national museums with modifications to suit the major funders: ACE and the LA (Interview 14).

### *Bringing in Funding*

Local Authorities appear to value ACE accreditation, with the need to maintain this status commonly included in committee papers. However, in most cases, the rationale reported to LAs about why the service required ACE accreditation was that it enabled them to apply for funding that they would not otherwise be eligible, both from ACE and other grant-giving bodies for (e.g. Bath & North East Somerset Council, 2014a; Bath Heritage Services, 2013a; Blackpool Council, 2013; Elmbridge Borough Council, 2008a; Epping Forest District Council, 2009a; Julie Cole Consultancy, 2014; Uttlesford District Council, 2014a, 2015a; Warwick District Council, 2012a; Welwyn Hatfield Borough Council, 2014a). Similarly, the Grundy Art Gallery in Blackpool reported having achieved National Portfolio Organisation status as an 'honour', while also commenting on the funding that this status brought (Blackpool Council, 2011c). In contrast, both Museums Worcestershire and Leicester Museums report frustration about being ineligible for funding streams that having a designated collection would bring (Interview 2; Worcestershire County Council, 2012b).

While organisational documentation also noted that accreditation represents minimum standards for professional museums (e.g. Epping Forest District Council, 2009a; Julie Cole Consultancy, 2014), this was usually (but not always, e.g. St Albans City and

District Council, 2010b, which focuses on assurance of community benefit) coupled with the statement about the financial importance). In relation to applying to maintain accreditation:

It is important for the Grundy to continue to maintain the highest professional standards if it is to receive quality touring exhibitions and investment from external funders. (Blackpool Council, 2013)

The financial implications of accreditation, then, are utilised by LAMs to justify the maintenance of standards. For example, in Cambridgeshire, the need to maintain accreditation was given for why the Cromwell Museum needed to employ a qualified curator (Interview 1; Julie Cole Consultancy, 2014), and in Bath, justification for maintaining minimum standards of collections care was associated with the need to retain accreditation due to this being a qualifying factor in some grant applications (Bath Heritage Services, 2013a, 2013b).

In other cases, the external funding that LAMs can bring was demonstrably valued by LAs. In Epping Forest, committee minutes note that cultural services, including museums, had a high level of partnership work and so brought in external funding. The council urged the museum service to position their services more corporately to do more in this area (Epping Forest District Council, 2008a). The museum service successfully won ACE funding to develop exhibitions to tour the region and was considered as being important despite being non-statutory (Epping Forest District Council, 2009b, 2010a). In Doncaster, the council established a Heritage Board to prioritise and approve grant applications (Doncaster Metropolitan Borough Council, 2015a). This suggests that the council prioritised heritage in terms of the external funding it could leverage. They established a Heritage Services team and developed a heritage strategy (Doncaster Metropolitan Borough Council, 2015b).

In Cambridgeshire, committee members questioned whether LAs should be promoting public art in the economic climate and queried the maintenance of the culture budget. Committee minutes show that the justification provided was that public art and culture programmes brought in grant funding to the LA and could be used to tackle wider agendas such as public health (Cambridgeshire County Council, 2012). However it was apparent that there was no evidence available to back up these claims and they were presented as potentials where links could be made (Cambridgeshire County Council, 2012). Further, councillors were unconvinced without evidence (Cambridgeshire County Council, 2012), and the financial data used in Phase One shows that

expenditure on culture fell at in the following financial year (Department for Communities and Local Government, 2012b, 2015).

### *Earned Income*

Interviewees reported that LAs had become more interested in income generation figures in recent years. While this had been of importance for Bath for a long time due to their unique business model, interviewees from both CIMS and Museums Worcestershire perceived that it had become more prominent since cuts began (Bath & North East Somerset Council, 2012b; Bath Heritage Services, 2010: 2010–2015, 2015a: 1; Interview 8; Interview 9; Interview 10). For CIMS, generated income was now part of the base budget for the service (Interview 9) and for Museums Worcestershire customer spending had become a more prominent indicator where visitor numbers had previously been the most important (Interview 10). There was evidence of this elsewhere, for example a strategic review of Doncaster Museums was going to use visitor numbers and staffing levels as part of looking at the profit/loss of activities (Doncaster Metropolitan Borough Council, 2011b). This focus has resulted in change for the museums. For example, the interviewee for TWAM reported that staff were more numerate than previously, with measures such as donation per head, and income vs profit, now understood by team members without a commercial background (Interview 13).

### *Beyond Visitor Numbers*

The interviewee for Leicester Museums reported that under the Conservative government there were fewer performance indicators, which was appreciated as it saved time and money for the service (Interview 2). Nonetheless, museums struggled to report performance for activities that were not targeted at large numbers of people. For Museums Worcestershire, one interviewee described that they looked for performance frameworks for internal evaluation of programmes in order to compare their work with other museums and provide feedback to other museums on what did and did not work (Interview 11). However, evidencing the impact of the work to the council and service commissioners in this way remained a challenge:

So working with these care homes is never going to be high numbers, we need to work with small groups to get quality of experience, so we'll use frameworks and creative evaluation [...] It's really difficult, I think, for museums to evaluate what they do because a lot of the time it's trying to prove that we're supporting the NHS by doing these projects in care

homes. How do you evidence that? [...] We know it makes a difference, but it someone could come up with some kind of miracle answer for that I'd love to hear it. (Interview 11)

The organisational documentation reviewed in this study suggests that LAs value the positive media coverage that LAMs can generate. Press coverage was regularly reported to the council in committee papers, such as in Blackpool in relation to the success of the Round 1 HLF bid and coverage of events (Blackpool Council, 2009b, 2014e). Press coverage was also specifically a performance measure in Birmingham and was expected to be one in Cambridgeshire (Birmingham City Council, 2008a; Interview 1). In CIMS, the interviewee felt that local press was influential in shaping the way the council was perceived by the public and therefore was of particular interest to councillors (Interview 9). Indeed, in one set of committee minutes a member commented that there had not been sufficient press releases (Colchester & Ipswich Museum Service, 2013a). In Bath, the interviewee perceived that one reason the council was not keen to devolve the service was due to the 'good news stories' it delivered (Interview 8).

### *Reputation*

Having a regional, national or international reputation is a common inclusion in committee papers and was a common aim mentioned in interviews. The reported reputation is often for learning: Birmingham Museums report having a national reputation as a leading museum education provider (Birmingham Museums & Art Gallery, 2009c); Leicester also report that their education service is amongst the best in the UK (Leicester City Council, 2008a); St Albans states that the learning service at Verulamium remains one of the best in the country (St Albans City and District Council, 2015a); TWAM report having a national leadership role for work with children and young people (Interview 13). However, it was unclear what these claims were based on and interesting that they were made by so many of the sampled LAMs.

A second common boast relates to the importance of the locality and museum, either as a destination for tourism or as a component of civic pride. For example, Blackpool is stated to have 'national, if not international, historical significance' (Blackpool Council, 2009a). The William Morris Gallery in Waltham Forest was reported to be 'increasingly high profile' and a 'world-class cultural destination' (Waltham Forest Council, 2013b, 2014a). St Albans Museum service expressed the aim of developing the service's regional and national reputation in order to 'reflect the importance of St Albans' (St Albans City and District Council, 2015a). The rhetoric used at Bath includes describing

Bath as 'distinctive' (Bath & North East Somerset Council, 2011d). The ambition in refurbishing Nottingham Castle was for it to become '[...] a world class heritage attraction and a nationally significant centre'. The objectives for Birmingham Museum and Art Gallery include presenting 'the city's history in its significant global and national context' (Birmingham City Council, 2007a), with the collections considered a cultural asset that could give Birmingham 'an identity on the world map' (Interview 14). This was discussed in relation to the benefit that it brought to residents in terms of sense of civic pride (Interview 14). The impression given is that LAMs promote the identity of their locality to justify the importance of capturing it in a museum.

Reputation amongst peers is another facet. For example, reputation beyond the region was stated as a benefit of the joint service of TWAM (Tyne & Wear Archives & Museums, 2014b). TWAM's mission includes being world-class and the service is described as having a great reputation and being regarded as an exemplar of a joint service in terms of the difference it makes in people's lives (Tyne & Wear Archives & Museums, 2010c, 2012d: 2011–2012). The risk of losing 'national quality' was used to caution against further cuts to curatorial and learning staff (Tyne & Wear Archives & Museums, 2014b). The interviewee for CIMS expressed a desire to be seen as '[...] a player in the region and nationally' and it was felt that the size of the joint service, as opposed to two smaller separate services, facilitated this (Interview 9). This was formally stated in the service's aims that they wish to be recognised nationally as being one of the best (Colchester & Ipswich Museum Service, 2009b; Colchester Borough Council, 2013c). CIMS report that their loans to national or foreign museums 'greatly adds to the prestige of the organisation and raises its profile.' (Colchester & Ipswich Museum Service, 2008a). They further reported the importance of the service contributing to national and regional strategies, having a responsibility to do so given its 'important and growing reputation' and therefore influence (Colchester & Ipswich Museum Service, 2008a). This trait exists for smaller LAMs as well, such as Hackney Museum which describes itself as a 'national leader' in community engagement, prompting visits from international practitioners (Hackney Council, 2011c).

The interviewee at Birmingham Museums Trust discussed the growth of their international profile, but also that the services' new seven-year plan focused on visitors rather than peers (Interview 14). As noted by the interviewee from Leicester, these two aims are not mutually exclusive, as an international reputation can contribute to pride in local identity (Interview 2).

While most of the claims were seen in many of the sample museums, there were examples of LAMs trying to develop a unique reputation. For example, Epping Forest

Museum Service is focusing on developing a reputation for touring exhibitions (Epping Forest District Council, 2009b), and CIMS report themselves to have a 'growing reputation as a leader in the field of disability access' (Colchester & Ipswich Museum Service, 2008a).

Finally, while it is common to claim reputation and quality without evidence, where there is evidence it is given in the form of awards and accreditation. For example, Bath reports having been nominated for or won various tourism awards (Bath Heritage Services, 2015b); CIMS reports having been awarded a prestigious education award (Colchester & Ipswich Museum Service, 2009f); Birmingham report having won community awards, tourism awards, and having achieved Customer Service Excellence accreditation (Birmingham City Council, 2011a); Epping Forest reports having maintained its VAQAS award and having achieved it for Lowewood Museum as well (Epping Forest District Council, 2014e).

### *Discussion*

The MA request that performance focuses more on quality of engagement rather than on audience numbers alone (Museums Association, 2012: 20). For the sampled LAMs, while visitor numbers and income measures are given as official performance indicators, it is clear that LAMs try to express quality and intrinsic value. Grand statements about reputation are most common, and the challenge of evidencing small scale engagements remains. Other performance measures are used internally and as part of sectoral networks, such as benchmarking and informally sharing the assessment of activities. As measures reported to LAs do not appear to have a direct impact on funding, these may be more valuable.

In looking at performance measurement for DCMS funding museums, Davies and Selwood argue that it is important to consider what is really required and how it will be used, as data collection is expensive and should not be collected for the sake of it (Davies and Selwood, 2012: 202). Nonetheless, despite losing ties with its LA, the interviewee anticipated that performance for the Cromwell Museum Trust would largely be in the form of numbers, such as visit numbers, sales income, number of events, number of schools visits, website visits, and number of press mentions (Interview 1). This case provides an example of the overall difficulty of comprehending performance beyond numbers: though not required to measure performance in any particular way, the Trust is likely to default to quantitative rather than qualitative measures.

### **8.2.3 How LAMs are treated by LAs**

The New Local Government Network argues that the funding of arts and culture is a 'conundrum' for LAs in the current financial climate. They argue that it feels extravagant to spend money on museums when social care is at risk, but not having cultural facilities results in 'sad' places without the assets that attract businesses and skilled workers (Harvey, 2016: 5). This study found further evidence of how LAs feel about LAMs.

#### *Focus on Economic Potential*

There were two cases with a clear impression that the LA valued the LAMs and in both cases this was due to their economic impact. Blackpool Council has had a heritage strategy since 2006 and appointed a Head of Heritage in 2007, suggesting increasing importance of the heritage agenda in the regeneration goals of the LA. Blackpool Council had hoped to open a National Museum for the Performing Arts and aimed to reap financial benefits from this in terms of retail and tourism (Blackpool Council, 2008c). After this project fell through, the LA developed a proposal to open a Blackpool museum. Opening a new museum for Blackpool was reported as a priority for the Regeneration, Tourism and Culture Department (Blackpool Council, 2014a). Overall, with regeneration in mind, Blackpool Council has an apparent commitment to extending the cultural offer of the city.

In Bath, a study found that the Roman Baths contributes around £107 million to the local economy annually (Interview 8). As such when planning how to manage cuts across the LA, a committee stated that:

The majority of the panel felt that these services should have minimal reductions made to their budget as they are at the heart of what brings visitors to the area. (Bath & North East Somerset Council, 2011b)

However, Bath may be considered an anomalous case, due to generating a substantial surplus (Bath Heritage Services, 2015a). Valued as an economic asset, the interviewee believes that the LA is keen to keep the service in-house even though consultancy has shown that it would benefit from the operational freedoms of Trust status (Interview 8). Further, there is some evidence that the council is more interested in the income potential of the Roman Baths than the Victoria Art Gallery, which requires subsidy, meaning that the service must advocate strongly for its other venues:



[...] there occasionally have been people who have said 'well that isn't part of your commercial business, you can cut the art gallery'. And we've said no, it's an important part of our service to local people. (Interview 8)

### *Valued but not supported*

While other LAMs cannot hope to deliver a surplus like Bath, there is evidence that LAs wish for them to generate more income. For example, Worcestershire County Council reported a desire to maintain all museum sites of Museums Worcestershire, but thought that a more commercial approach was needed, whereby visitor numbers were increased and more income generated (Worcestershire County Council, 2013c).

In Dartford Borough Council the picture was more mixed. Committee papers show a desire from the council to improve and expand the reach of the service, in particular in relation to schools, and to develop its objectives in relation to the council's corporate plan (Dartford Borough Council, 2006, 2007a, 2007b, 2008b, 2013a). Committee papers report to councillors that the service contributed to the corporate plan in categories including community, regeneration and leisure (Dartford Borough Council, 2007d, 2013a). Further, there is evidence of committee members trying to avoid reducing resources (Dartford Borough Council, 2006). However, when a working group made suggestions to improve the museum it was clear that the council would not be able to support the proposed work, even before the onset of the Coalition's austerity:

Given that the provision of additional Council money was not expected, Members asked that all possible external funding sources be explored.  
(Dartford Borough Council, 2006)

The council wanted to improve the service by increasing its use, but could not commit more resources to it (Dartford Borough Council, 2008b). Further, most documentation found for this service came from before 2010, suggesting that as financial conditions in the LA declined the museum lost visibility. These cases illustrate the findings of the New Local Government Network: that LAs are finding decisions about funding arts and culture a conundrum. The evidence suggests that Worcestershire County Council, Worcester City Council and Dartford Borough Council want to support their museums but cannot justify expenditure to do so, and so the museums need to fend for themselves.

### *Distant and Undervalued*

On the other hand, in Cambridgeshire the museum was considered inviable for long-term council support due to its small scale and limited development potential (Cambridgeshire County Council, 2012):

The Cromwell Museum was the only museum that the County Council supported and was housed in a very small old school building with no toilets. The Corporate Director queries how long the Council would continue to be able to support the museum given these limitations.

(Cambridgeshire County Council, 2012)

In Elmbridge, the museum was considered a poor use of public funds due to its visitor numbers and was considered unsustainable (Elmbridge Borough Council, 2010). While redeveloping the museum was considered, it was found to be too expensive given the economic climate (Elmbridge Borough Council, 2010). Interestingly, in discussing the future of the museum it was suggested that a mission statement and key objectives should be developed, indicating that the service did not have these prior to this point (Elmbridge Borough Council, 2010). The museum, then, may have failed to correlate its activities with that of the council in order to demonstrate its importance. In both cases, the LA retained ownership of collections, but the Cromwell Museum was devolved to Trust with no LA funding and Elmbridge Museum was closed to create a 'museum without walls'. Elmbridge Museum interviewees, however, expressed feeling they had engaged better with the wider council and worked more with other teams since moving from the museum building into council offices (Elmbridge Borough Council, 2013; Interview 3; Interview 4):

There had sort of been a bit of antipathy towards the museum and its service because I think we were hidden away and they used to forget about us, and they just used to look at the cost at the end of the year and think hmmm. Because stuck over off-site people didn't really know, didn't even know that we were part of the council. So, we've been able to raise our profile being here in the building. (Interview 3)

They reported getting involved in events across the LA which enabled them to showcase their offer, but conceded this meant they took part in events that they felt were inappropriate, such as play sessions for babies and toddlers (Interview 3). They felt the outcomes they wanted to deliver were similar to the outcomes the LA wanted to deliver, but they were approached and expressed very differently, meaning that working more closely had aided understanding (Interview 3).

The interviewee at Saffron Walden Museum in Uttlesford reports feeling undervalued by the LA (Interview 7):

[...] the council was not actually under direct financial pressure in the way other authorities have been. It wasn't a situation where they had been having to make cuts across the board just to meet the budget. They seemed to have a notional target they wanted to get museums spending down to. (Interview 7)

The interviewee described how the LA wanted the museum to generate more income and that their income and visitor numbers increased when they had a learning officer in post, but that they had been unable to get approval to recruit a learning officer (Interview 7). In this respect, the museum was not being supported by the LA to become more self-sufficient in this specific way, suggesting that it was a low priority.

### *Engaged with Politics*

In Leicester, the interviewee perceived that the LA was interested in the museums service (Interview 2). When asked about the relationship the museums service had with the wider council the interviewee responded:

I think that it's not true to say the relationship with the council, it's our relationships within the council. A lot of museums don't see themselves... they see themselves as a bit 'other', but we are within the culture division that involves libraries, sports, community centres, arts and museums. We are very much part of the council. (Interview 2)

The perception that some other services see themselves as somewhat separate to the wider council was apparent in my research. For example, in Warwick the interviewee expressed the view that museums are challenging for LAs to understand due to being very specialist and different to most other council services (Interview 5). A staff survey in St Albans found that staff did not feel like the museums service was part of the council due to lack of information about the wider organisation and lack of internal relationships (St Albans City and District Council, 2009). However, the Local Government Association's September 2016 survey of heads of LA cultural services found that the majority of respondents felt that their services were adequately embedded within the priorities of the LA, with only 5% stating that they were not embedded (Local Government Association, 2016: 10).

In Worcester, the view that museum staff often consider themselves separate to other council workers was acknowledged, and it thought that services were more successful

if they 'embrace[d] the politics' (Interview 10). They felt that the Museums Worcestershire had been successful in expressing to the council that they were more than 'just a nice place to look at' and could have a role in economic growth through attracting tourism and helping to make Worcester appear a nice place to live (Interview 11). In particular, the service had successfully engaged with the city council's consideration of a 'city of culture' bid, highlighting the potential for heritage tourism in the city and resulting in the city council setting heritage as one of their top 5 priorities despite deciding against the bid (Interview 10; Interview 11). Similarly, the interviewee from CIMS perceived heritage to have become a priority for the LA, with the LA wishing to develop heritage tourism for economic reasons. It was expressed that the successful development of Colchester Castle and the overall work of the Museums Service had shown the potential of heritage (Interview 9).

### *The Local Authority as a Safety Net*

There is evidence that LAs are safety nets for LAMs. For example, in Doncaster the museum service was expected to overspend by £327k in 2009-2010 due to unbudgeted expenditure and insufficient income, and by £53k in 2010-2011 (Doncaster Metropolitan Borough Council, 2009a, 2010a). There is no evidence of consequences for this overspend. In both Elmbridge and Dartford, support from the LA was expected if funding from elsewhere could not be found. In Elmbridge £125k was requested from the 2008-2009 capital programme as part of the (ultimately abandoned) redevelopment scheme in the event that external funding was not found (Elmbridge Borough Council, 2007a). When an additional £8k was required for a website development, Elmbridge Borough Council provided this from the ICT budget (Elmbridge Borough Council, 2014). Similarly, moving out of a collections store in Elmbridge was estimated to generate £70k in dilapidation costs, for which no funding was set aside but somehow covered (Elmbridge Borough Council, 2014). In Dartford, the LA was asked to provide £10k, which comprised half of the cost of a capital project, despite there being no specific budget provision for this expenditure (Dartford Borough Council, 2013). In Waltham Forest, when external contributions fell short of expectations and costs increased, the council provided an additional £1m of funding for the redevelopment of the William Morris Gallery (Waltham Forest Council, 2013b).

### **8.2.4 The Influence of Public Support**

The New Local Government Network found examples where resident demand had resulted in a stay of execution for arts and culture (Mansfield, 2014: 18). For example, in Newcastle, the city council announced plans to cut all grants to the Arts in 2012, and

the public and professional outcry attracted national media attention (Ahrens and Ferry, 2015: 918). As a result, the council agreed to lessen the cuts (Ahrens and Ferry, 2015: 922). Similarly, this study found that public support caused LAs to reconsider, but that ultimately cuts were postponed rather than cancelled. For example, an online petition and a consultation found public support for museums in Birmingham (Birmingham City Council, 2015a, 2015b). The council responded by temporarily lessening cuts to support restructuring (Birmingham City Council, 2015a). On a smaller scale in Cambridgeshire, the decision to defund the Cromwell Museum was deferred for a year to allow the development of alternative management due to public pressure (Cambridgeshire County Council, 19 Feb 14, 2014b). A petition was signed by over 6,000 people demanding that the museum remain open (Cambridgeshire County Council, 2014a).

The reason why public pressure gives a temporary reprieve only may be due to the trend for public outcry to dwindle. For example, public interest in the Cromwell Museum had fallen significantly since the decision to devolve the museum to Trust was made (Interview 1; Interview 6). In Elmbridge, the LA felt that closing the museum service entirely would be perceived negatively by the local community but went ahead. The Friends organisation folded with the museum's closure, with staff reporting that support from this group could not be retained (Elmbridge Borough Council, 2010; Interview 4). Nonetheless, they were receiving positive feedback from residents since exhibits had been installed in local libraries (Interview 3).

Further, museums were not always found to be popular with the public. Consultation in Nottingham saw museums ranked lowest in terms of importance to residents, alongside events (Nottingham City Council, 2012a). A similar finding was made in Worcestershire (Worcestershire County Council, 2013c). Similarly, an interviewee for Museums Worcestershire perceived that residents liked to know that the museums were there but did not necessarily use them (Interview 12). Overall, one can see that LAs are unlikely to let public opinion sway their decisions to cut museums, knowing that opinions are mixed and outcry temporary.

### **8.3 Discussion**

I have shown that working within the confines of local government is challenging for museums. LA systems and procedures were not always ideal. For example, in relation to austerity and the mandate for museums to generate income, LA financial systems make it hard to spend money and to highlight income. Similarly, LAMs find that their ability to communicate and therefore promote themselves is restricted, making it harder

for them to develop their brand and reach a wider audience, as they are mandated to do.

LAMs are also affected by LA-wide initiatives and events that may generate obstacles or increase workloads. Committees are challenging as not all councillors are interested meaning that the museum becomes a 'hostage to fortune' regarding the membership of the relevant committees each year. However, smaller museums benefit from the support of a larger organisation to deliver services such as payroll, HR and IT that they would struggle to hold in house, and many LAMs benefit from indirect financial support from their LA in the form of subsidised premises. These findings correspond well with those of Babbidge looking at the pros and cons of museum Trusts. Babbidge finds that whether Trust status is beneficial depends on the specific situation of each museum and that it is not clear cut (Babbidge et al., 2006). Here, I find that there are benefits and drawbacks to being part of an LA, and suggest that whether the balance swings towards it being a help or a hindrance depends on the individual museum.

I found concern about where LAMs sit within the LA, but no agreement on what the best location was: community services or economic development. Further, departments seemed to change quite regularly and the sampled cases were in a variety of departments, suggesting that museums do not fit easily into LAs. It was not apparent that the department had much impact on the LAMs activities, with those in community departments often still talking about regeneration. It also appeared that LAMs were adept at translating their activities to fit with different agendas. This correlates with our discussion in Section 4.3 regarding whether cultural organisations find ways to match government policy to their existing activities. Do the objectives of Arts organisations try to fulfil those of other actors, or are the objectives those of the organisation presented as if they fulfil those of other actors? Gray concludes the latter and this study tends to agree (Gray, 2016: 2, 6). What loses out in all cases, however, is collections. That a key function of a museum is the stewardship of collections was rarely mentioned in interviews and organisational documentation. This matches with frustration expressed by interviewees about difficulty in communicating the need to maintain collections standards.

The purpose of the LAMs as described in organisational documentation showed that intrinsically enriching lives was always coupled with instrumental benefits. Museums were tasked with contributing to educational attainment, quality-of-life, health and wellbeing, and community cohesion. Economic concerns are also prominent, both in terms of tourism and through attracting businesses.

Smaller museums tended to focus on local people rather than wider visitors. In fact, focus appeared to have become more local in recent years, such as at Elmbridge Museum. In practice this results in the rationalisation of collections and represents a downsizing of museum's scope, in terms of collections held and audiences sought, to fit within available resources. The Leicester interviewee pointed out that there are different ways to serve local people, as LAMs must do as part of the LA, and that museums utilise people from outside of the area to benefit local people economically and in terms of generating local pride. Nonetheless, the scope of the smaller museums was to directly serve local people by focusing on them, whereas the larger museums were able to serve local people in a broader sense.

Aims were usually directly connected to LA priorities. In Section 4.1 I showed conflict between intrinsic museum values and instrumental public policy values, but I have found LAs to have aims that are to some extent intrinsic. For example Birmingham Museum Trusts' collections policy describes fitting with the council's priorities in terms of social, intellectual, emotional and spiritual needs (Birmingham Museums & Art Gallery, 2008a: 2009–13). Other aims included creating community cohesion and enabling residents to enjoy life (St Albans City and District Council, 2009, 2010d; Welwyn Hatfield Borough Council, 2011b).

Despite the rhetoric, performance measures centred on visitor numbers and value for money with little attempt to report performance specifically in terms of the wider objectives described. For example, if it was stated that the museum contributed towards making the area desirable for visitors then evidence of this was not presented beyond programmed events and attendance. However, one interviewee described how difficult measuring performance for outreach type activities was proving to be. They suggested that evaluation methods they employed were more valuable to other museums than to LAs.

Another key way that museums appeared to justify their value to LAs was through bringing in funding. Whether they demonstrably did or not, the fact that they could was regularly used in justifying the need to maintain ACE accreditation and therefore professional standards. In some cases, there was evidence of the LA requesting the LAM to focus on bringing in external funding, such as in Epping Forest and Doncaster. An earlier study of National Museums found that acquisitions and capital projects had a positive influence on the level of the government grant-in-aid, whereas visitor numbers and operating costs did not (Maddison, 2004: 102–104). This, in combination with the findings of this study, suggests that LAs value the ability of LAMs to secure external funding and that focusing on this may be a way for LAMs to raise their profile.

However, whether this is true for large LAMs like Birmingham Museums Trust and TWAM that receive funding from multiple sources is unclear, and it would be useful to consider external income in proportion to LA income. Overall, generating income was perceived by interviewees as having become more important to LAs, but increasing earned income did not stop LAMs from receiving budget cuts.

In organisational documentation there are common boasts about the reputation of the museums, with the LAMs appearing keen to promote their prowess within the sector. Similarly, the reputation of the locale in terms of historical importance was a common boast, as an apparent justification of the importance of having a museum. On a smaller scale, press coverage was often reported in committee papers, with the perception that providing 'good news stories' was something that museums were well-placed to do for LAs in comparison to other less photogenic services.

However, the impact of this data and these attempts to show worth were not clear. There was usually no clear correlation between performance against targets and described importance and funding decisions. The exceptions are Bath and Blackpool, where museums appear valued for their economic contribution (or potential contribution in the case of Blackpool), and Elmbridge Museum where poor value for money was used to justify its closure. It seems, then, that what LAs want from LAMs is visitors and income, but the data collected does not have a practical application. LAMs appear to perceive that impressing LAs with their reputation and historical importance is worthwhile, which is perhaps an attempt to move beyond visitor numbers. The service that illustrates the challenge well is Bath, through the dichotomy of the economically important Roman Baths and the commercially unsuccessful art gallery. The service appears to exploit the economic potential of the Baths, thus appeasing the LA, but does so to enable provision of the remainder of the service and has to work hard to ensure that the resources are valued and cared for appropriately.

Three cases showed distant and undervalued LAMs. These were geographically and culturally distant from the LA, and either failed to connect their activities to the LAs priorities or were not listened to where they tried. Where museum aims were not tied to LA aims, the relationship between the museum and the LA seemed to suffer, as in Cambridgeshire. Where LAMs 'embraced the politics' and situated themselves as a clear part of the council they appeared to do better, or at least staff felt better. I saw that some LAMs are more understanding of the LA's need to make cuts than others, but that this is not correlated to the level of cuts made. LAs that are more engaged with 'the politics' seem to have a higher level of understanding than those that are more isolated from the LA. Senior staff tend to be more understanding than more junior,



probably because they are more involved in the bigger picture. Smaller LAMs and those lower in the hierarchy tend to feel more marginalised. However, even large LAMs become lost in large LAs, such as Birmingham City Council. In a large LA it is harder to work with people from different departments and it is harder to be a priority. For example, smaller Huntingdon Town Council has taken an interest in the Cromwell Museum where larger Cambridgeshire County Council has not, and Worcester City Council values heritage more than Worcestershire County Council. Geographic distance also has a similar effect: it appears that LAMs need to be close to the council to be valued. This is not clear-cut and it would be interesting to explore this further.

Others services are valued in theory but not in practice. Encouraging words for services such as Museums Worcester and Dartford Museum are not backed up with financial support. The message from the council is that the museums must find ways to help themselves because the council's hands are tied. The ACE study of LAM resilience found that there was a level of acceptance that being valued by the LA did not mean that the LAM would not receive cuts, acknowledging that LAs have over 1000 statutory responsibilities (National Audit Office, 2013: 5; TBR et al., 2015: 21). Nonetheless, LAs propped up shortfalls, allowed overspends, and retained ownership of collections, suggesting that something of a safety net remains.

## 9 Governing, Managing and Operating in Austerity

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In this chapter I use the organisational documentation collected in phase 2 and the interviews from phase 3 to look at the governance, management and operations of the sampled LAMs. I consider governance in terms of organisational structure, management in terms of strategy, and operations in terms of activities, to analyse the LAMs' response to austerity, its impact and efficacy.

First, in Chapter 8 I discussed LA governance of LAMs and therefore in this chapter I go on to look at alternatives in use by the sampled LAMs. I find that while most services have considered alternative governance it has usually been rejected as unviable. In looking at management I find that looking for opportunities, in particular in the form of external funding, is key in maintaining a positive profile and mitigating loss of LA funding. I see risks from this in terms of 'doing too much with too little', and a blurred distinction in the aims of projects. Finally, I see hesitation in addressing the situation from some LAMs, with actions such as improved marketing appearing stalled. In some cases, this is due to the perception that the situation will improve and in others it is due to lack of skills and resources to act.

### 9.1 Governance

#### 9.1.1 Trusts

Two LAMs included in this study were devolved to Trust in response to austerity. They have very different scales: The Cromwell Museum Trust was formed when Cambridgeshire County Council made the decision to defund this small museum, the only one that they ran; and Birmingham Museums Trust is the largest museums service in the sample, with multiple sites and a multi-million pound budget. Other LAs considered and rejected Trust status for their LAMs.

#### *Consideration of Trust Status*

The justification given by the council for the devolution of Birmingham Museums was that it would enable savings to be made that would not impact the service being delivered, therefore minimising the direct impact of spending cuts on visitors (Birmingham City Council, 2011b). Organisational documentation shows the argument that merging the governance and management of Birmingham Museums with the existing Thinktank Trust would result in efficiency savings by reducing duplication and

creating economies of scale, such as for procurement (Birmingham City Council, 2011g, 2011f). Rate relief due to charitable status was expected to achieve 40% of the required savings (Birmingham City Council, 2011b). The Trust would further enable savings for the LA by generating more income itself. Again, merging the museums would result in an 'enhanced package' to entice funders (Birmingham City Council, 2011g, 2011f, 2011e). The council argued that operating all the museums under one Trust would result in an improved offer due to increased potential for joint initiatives between sites (Birmingham City Council, 2011g, 2011e).

The decision to devolve the Cromwell Museum to a Trust came after an initial proposal to close the museum entirely. The council argued that they could not justify supporting the museum given its limitations and the financial climate (Cambridgeshire County Council, 2012). However, public protest of the decision led the council to look for alternatives (Cambridgeshire County Council, 2014b). A consultant was contracted to evaluate options and found no interest from other LAs to take over the museum. Two options involved moving the collection out of Huntingdon: Vivacity offered to manage it if it was moved to Peterborough, and the Civil War Museum in Newark offered to dedicate a gallery to Cromwell (Julie Cole Consultancy, 2014). However, the consultant reported that stakeholders found the idea of moving the collection out of Huntingdon unacceptable (Julie Cole Consultancy, 2014). Trust status was the remaining option (Julie Cole Consultancy, 2014). Unlike in Birmingham, there is little discussion of the benefits of Trust status, though there is a brief mention in organisational documentation that it would give the Cromwell Museum the opportunity to be 'reinvigorated by fresh energy' (Cambridgeshire County Council, 2015).

The interviewee for Leicester expressed the opinion that LAMs went to Trust when LAs were not interested in them (Interview 2). The case of the Cromwell Museum initially supports this position, with little evidence available to suggest that Cambridgeshire County Council had an interest in the Cromwell Museum beyond pacifying the public. As I showed in Section 8.2.1, organisational documentation from Cambridgeshire County Council showed a limited connection between the LA's priorities and the LAM's activities (Cambridgeshire County Council, 2014b), but I do not know whether this is due to the museum failing to explicate its value, or the LA being uninterested in what they had to say. The museum building was transferred to Huntingdon Town Council who would lease it to a Trust on a peppercorn rent basis (Birmingham City Council, 2011e; Huntingdon Town Council, 2014b). One interviewee thought that the town council were keen on this arrangement as it meant the building would remain in use, acknowledging that due to its limitations (no running water etc.) it would be difficult to

find an alternative (Interview 1). One can see the town council's interest in retaining the museum in its decision to charge a peppercorn rent, knowing that the Trust would not be able to afford its market rate (Huntingdon Town Council, 2014b; Interview 1).

However, they did not offer revenue funding. In another case, while Trust status was recommended by consultants for Bath Heritage Services on two occasions due to the freedom it would grant, the council was unwilling to go through with devolution (Interview 8). The interviewee from the service thought that the LA was concerned that they would lose the income they received from the service and that they wanted to remain associated with the 'good news stories' that the museums delivered (Interview 8). As such, the LA can be seen as interested in the museums for their financial and reputational benefits.

Documented reasons for the rejection of the Trust model did not have much variation. The primary rationale was that it would not generate substantial savings for the LA in the short term. For example, Worcester City and Worcestershire County Councils initially intended for Museums Worcestershire to be devolved to Trust status (Rutherford, 2009), but the city council later rescinded their support of this move as it would not reduce their expenditure on the service in the short to medium term (Worcestershire County Council, 2013c). Trust status was considered for TWAM, with consultancy commissioned to consider it from a high level (Tyne & Wear Archives & Museums, 2013a). However, they concluded that it would cost the LAs money in the short and medium term and therefore was not viable even though it may bring savings in the long term (Interview 13). Potential savings were also considered small in Welwyn Hatfield and Bath (Interview 8; Welwyn Hatfield Borough Council, 2011c). Babbidge et al. warn that devolving a local authority museum to a Charitable Trust should not be seen as a money saving exercise as the museum is likely to continue to require the same funding from the authority, and some initial investment is likely to be needed too (2006: 4). It is clear that, where LAs have considered devolution, saving money has been the primary concern but that many have ultimately reached this conclusion. While charitable museums were found to have lower expenditure in one study (Stanziola, 2011: 126), the key variable is time: due to the immediacy of the funding situation for LAs and the length of time needed for a devolved museum to reduce spending, Trust status is not viable for many LAs at this time.

The MA argues that the findings of its annual cuts survey show that Trust status is rejected by smaller LAMs due to a perception that it is not suitable for small museums (Museums Association, 2015: 15). Certainly, the Saffron Walden Museum interviewee felt that they would appreciate the greater freedom of independence from the LA, but

that they were too small to operate alone, relying on the LA for central services such as payroll (Interview 7). They reported having considered groupings with other heritage or leisure facilities but none had seemed viable (Interview 7). Welwyn Hatfield Council also concluded that the service was too small to manage alone (Welwyn Hatfield Borough Council, 2011c). As mentioned in Section 8.1.2, an interviewee for the Cromwell Museum found that the support services that would be lost through leaving the LA were disproportionately large to deliver in-house due to the small scale of the museum. The Trust would need to find alternative ways of supplying IT, phones, fire extinguishers, electricians, and many other services (Interview 1).

In some cases, developments appeared to be geared towards the eventual devolution of the LAM. For example, a business case for the development of Nottingham Castle said that it should be operated by a Trust, predicting that income generation and operating costs would eventually balance so that LA subsidy could be ended by 2025-2026 (Nottingham City Council, 2013). In Leicester, despite the interviewees assertion about LA interest described above, committee minutes show desire from the council to find alternative arrangements for Belgrave Hall. Councillors thought that if the site was in better order and a more sustainable business model was implemented it may be possible to move to devolve the property and reduce subsidy (Leicester City Council, 2013).

### *Benefits of being a Trust*

The MA's cuts survey from 2015 found that independent museums that had formerly been LAMs were more successful in increasing their earned income than LAMs (Museums Association, 2015: 7). This was apparent in Birmingham where trading income reportedly increased to a level that the interviewee thought would not have been possible under LA management (Interview 14). Heritage Counts 2012 reports the benefit of heritage resources taking charitable status being the ability to undertake fundraising, use grants, and make investments (English Heritage, 2012: 7). In Birmingham, documentation shows that public donations also increased due to the new governance:

[...] enabling us to be outward-looking, enterprising and sustainable, with investment in marketing [...] (Birmingham Museums Trust, 2013a).

However, Bussell and Bicknell report a study of recently devolved museums that find that generating income through fundraising was harder than they had hoped, and Baker warns that these income streams are unreliable (Baker et al., 2006: 12; Bussell

and Bicknell, 2010: 17). One should therefore be cautious about the applicability of Birmingham Museum Trust's reported success to other examples.

Babbidge et al. find that the benefits of becoming a Museum Trust include freedom from the wider issues, objectives and bureaucracy of the LA, and the opportunity to change the organisational culture, develop new connections and partnerships (Babbidge et al., 2006; Lees, 2009). The interviewee in Birmingham considered reduced bureaucracy a benefit:

I think that the people who were here from the outset feel that having been removed from the city council and all the checks and balances that exist within the city council has been enormously beneficial. So we now have control of our own marketing and IT and recruitment, whereas within the city, within any council, one has to jump through a lot of different bureaucratic hoops. (Interview 14)

The Cromwell Museum Trust hoped to benefit from freedom in terms of communication, being able to have their own website, Twitter and Facebook accounts (Interview 1; Interview 6). In terms of making new connections, organisational documentation shows positivity about the appointment of trustees, having advertised for individuals with skills that would benefit the museum, such as marketing, fundraising, volunteer engagement and business administration (Cambridgeshire County Council, 2015). A benefit of having a board structure is that it provides an opportunity to bring a range of expertise to the organisation (English Heritage, 2012: 7), and one interviewee felt that the range of trustees appointed was a 'good mixture' including people with museum experience, the local MP, and local business people (Interview 1). This was a point raised in the ACE study of LAM resilience, that a success factor for Trusts is the establishment of an effective board with the ability to engage with the LA – as an MP would be expected to do – and utilising different skills from local people (TBR et al., 2015: 22). The New Local Government Network argue that a well-developed board can bring valuable skills, experience and network opportunities (Mansfield, 2014: 25). However, Babbidge notes that, in museums, this governing body is usually larger than the equivalent would be in a commercial organisation due to the conventional need to represent all stakeholders which makes decision making more difficult (Babbidge, 2006: 1).

### *Concerns for Trusts*

Gray likens Trust status for LAMs to the arms-length arrangement between government and national organisations like ACE, with the LA providing funding and

guidance through policy, but the museum having the independence to operate as they feel appropriate (Gray, 2016: 3). However, an interviewee in Worcestershire was concerned that leaving the LA would reduce their ability to influence decisions about their funding, in comparison to the existing joint committee arrangement (Interview 11). In Birmingham, staff reported that the Trust arrangements were not ideal:

[...] on the one hand the parent body [the LA] wants its child to do well and succeed in the big wide world but on the other hand it doesn't want to let go. (Interview 14)

In particular, the interviewee felt that the contract and leases were for too short a time period, giving the impression that the Trust was not set up to operate in the long term and was acting as a deterrent to potential funders (Interview 14). This issue is noted in the ACE study, that a Trust-based relationship and a shared vision between the LA and the museum is vital to success (TBR et al., 2015: 22).

While Birmingham City Council continues to fund the museums service (albeit at a dwindling rate) and postponed some cuts to facilitate a restructure, Cambridgeshire County Council ceased funding altogether in April 2016, leaving the Trust reliant on fundraising (Birmingham City Council, 2015a; Interview 1). This means a curator can only be employed on a temporary basis and the Trust may be unable to renew the contract if insufficient funds are raised (Interview 1). However, in both cases, the collections remained under LA ownership and were leased to the Trust, meaning that there is a potential safety net for the collections if either Trust fails (Birmingham City Council, 2011e; Interview 1).

### **9.1.2 Joint Services**

One joint service was established within the timeframe of this study: Worcestershire County Council formed Museums Worcestershire with Worcester City Council in 2010. However, two other joint services were included in the study: CIMS, formed in 2007, and TWAM, originally established in 1986.

#### *Benefits of Joint Services*

The interviewee for TWAM perceived that being a joint service gave them more freedom than other services. For example, TWAM has its own website, which many LAMs are not allowed (Interview 13). Documentation for TWAM states:

Joint local authority services have provided democratic accountability, brought economies of scale and allowed a service which is connected

regionally, nationally and internationally to develop. (Tyne & Wear Archives & Museums, 2014b)

An interviewee for Museums Worcestershire agreed with the principle of accountability. They perceived that the joint agreement made the service more robust due to the two LAs being accountable to each other and unable to make a decision about the service's future without discussion and negotiation (Interview 11). Having a joint committee was valued at both TWAM and Museums Worcestershire. The relationship between TWAM and its joint committee was reported to be good and the service well-connected within the client LAs. The interviewee noted that the director of the service was able to maintain relationships with senior management due to seniority:

[...] they effectively open doors, and that is important, you find a way of making your voice heard. (Interview 13)

In Worcestershire, the interviewees found that the joint committee was beneficial, being fairly quick to respond and having the authority to make many decisions. They found the direct link between senior staff and councillors helpful:

[...] there's nothing in between, which means that we can clearly get across our priorities, actually make a case for changes that we feel have to happen. (Interview 11)

That joint services are better connected with the wider sector was echoed at CIMS, where both the interviewee and documentation noted that being a larger service meant they were able to maintain a greater reputation (Colchester & Ipswich Museum Service, 2008a; Interview 9). Being a large service also meant greater potential to access national funds, such as the Major Partner Museum funding received by TWAM, and the interviewee noted that Sunderland lost out on ACE funds by leaving the joint service (Interview 13).

### *Complications of Joint Working*

Shared local government services are often established based on an aim of reducing costs, as Museums Worcestershire was, but do not always manage this and in fact initial investment is generally needed (Lloyd, 2015: 31). CIMS report that the joint service has enabled savings through economy of scale (Colchester & Ipswich Museum Service, 2008a). However, while Museums Worcestershire reported being open to having other LAs join the joint service, Wyre Forest District Council declined to do so, stating that they would not achieve savings from the merger (Worcestershire County Council, 2011a; Wyre Forest District Council, 2013).



Bazalgette recommends shared services as a way of providing a better service by ensuring that the offer is consistent across a wide area (2016: 5). However, while Baker et al. argue that pooling resources in joint services should lead to better coordination and therefore greater equality of services across region, they warn that this would lead to authorities being cut off from the communities they ostensibly serve (2006: 146). Neither organisational documentation nor interviewees mentioned this explicitly, but the interviewee for CIMS expressed that there are political and cultural differences between the two towns, Colchester and Ipswich, that need to be managed (Interview 9). They reported that some duplication of effort was needed due to being associated with two political entities (Interview 9). Organisational documentation showed that following the creation of the joint service, progress with establishing integrated systems that worked for both LAs had been slower than desired (Colchester & Ipswich Museum Service, 2008a, 2013b). The interviewee felt it was important to embed the service within both LAs, but found that it had been more work to develop relationships within Ipswich Borough Council than Colchester Borough Council. Colchester Borough Council is the lead council, hosting the museums and employing all staff (Interview 9). This case suggests that a joint service can remain close to the communities it serves, but must make specific efforts to do so.

The situation for CIMS was complicated when Colchester Borough Council decided to centralise all marketing and took away the museums services' own marketing function. This sat uneasily with Ipswich Borough Council, as it meant that some of their financial contribution ended up outside of the museums service (Colchester & Ipswich Museum Service, 2010c). Complication was evident for TWAM as well. There was a differing service level agreement with each LA client relating to the size and nature of each venue and the priorities of each LA, meaning that budgeting could not be approached a single method (Tyne and Wear Archives and Museums, 2013i). The interviewee thought that the decision by Sunderland Council to leave the joint service may have been fuelled by communication issues (Interview 13).

In Worcester, the lead council had been Worcestershire County Council but the service was likely to be moving to Worcester City Council. Interviewees felt that this was positive due to the smaller size of the city council allowing them to play a larger role within it (Interview 10; Interview 11). However, they acknowledged that there was a lot of work involved in terms of changing employment contracts and updating processes to match the new host (Interview 11).

### **9.1.3 Other Governance Models**

A wide range of governance models were apparent in the sample, both long-term arrangements and recent responses to spending cuts. They provide examples of arrangements that other services could consider. However, they also demonstrate the variability of the sector, due to historical accident and local culture. On occasion, they show creativity within the sector as novel solutions are sought to accommodate the product of historical accident. Importantly, though, there are more examples of alternative governance arrangements being considered and rejected, suggesting that the sector has struggled to find anything suitable. This implies that changes in governance are generally a solution for coping with public spending cuts.

As a variation of a joint service, Epping Forest entered into an agreement to run the Lowewood Museum on behalf of Broxbourne Borough Council. Documentation reports this as successful, generating revenue savings through shared resource use, providing greater opportunity for staff development, and enabling greater access to external funds (Epping Forest District Council, 2011a). However, I saw that joint museum committees were considered powerful by the joint services in this sample, and this arrangement misses that opportunity. Further, it would be interesting to find out how the arrangement affects the local suitability of what is offered at Lowewood Museum.

No museums in the sample were contracted to external suppliers, though this arrangement does exist around the country, such as Vivacity in Peterborough. Blackpool Council considered appointing an external management company to run the Winter Gardens, which would include the new museum, but instead chose to set up a council-owned company (Blackpool Council, 2014b). The council's rationale was that keeping the museum in-house would enable them to exert control on it to ensure it was fit for purpose and to co-ordinate it with other initiatives. They thought it would avoid potential conflicts between their objectives and those of the management company. Finally, they thought it represented the best value for money (Blackpool Council, 2014b).

Dartford Council considered combining museum staffing with libraries, and Doncaster council considered and rejected a merger between the libraries and museums services (Dartford Borough Council, 2007e, 2014a; Doncaster Metropolitan Borough Council, 2014). A similar proposition was rejected in Birmingham due to the pressures faced by potential LA partners (Birmingham City Council, 2011f). This implies that the speed of austerity impedes co-ordination between departments, where synergies might otherwise have been found. Consultants for Museums Worcestershire warned that

reducing budgets could impact the viability of alternative governance arrangements, such as devolution to Trust, suggesting that no trustees would be willing to become involved in an under-funded Museum Trust (Worcestershire County Council, 2012a).

Bath Heritage Services operate as an internal business unit and produce a profit. No other interviewees expected that they could follow this route. For example, the interviewee for Leamington Spa Art Gallery and Museum noted that leisure centres could adopt a commercial model due to having means of substantial income generation, but that this was not viable for the museum (Interview 5).

In Uttlesford, the museum building and collections are owned by a Charitable Trust and leased to the LA who run the service (Saffron Walden Museum, 2014a). The interviewee considered this to add resilience to the service, at least to the collection, and said that the Trust provides a source of capital funds (Interview 7). However, it also added a layer of bureaucracy: a Museum Management Working Group led collaboration between the council and the Trust, but did not have decision-making powers meaning that these had to go to Cabinet (Uttlesford District Council, 2013c, 2013a). In St Albans, the charitable connection also added complexity: the council was uncertain about whether the museum could be moved as the land where it sat was owned by a Charitable Trust set up for the provision of a museum. The council were sole trustees, but had to decide about the sale of the land in terms of its benefit to the Trust rather than its benefit to the council (St Albans City and District Council, 2012b).

A novel approach developed by Bath Heritage Services was as an advisory board of external experts who consider the service's plans and give their opinion to the council. The interviewee reported that this was beneficial as it gave weight to the service's arguments (Interview 8). This may be considered as a step towards having a board of trustees, appointed due to their varying expertise, while retaining the safety net of the council.

## **9.2 Management**

### ***9.2.1 Making Efficiency Savings***

For CIMS, cuts were applied across most of the service, known as 'salami-slicing'. Organisational documentation reports that making cuts required difficult decisions but that the service would remain balanced and high quality (Colchester Borough Council, 2011a). Elsewhere, savings were made through cuts to procurement, travel and staff training (e.g. Birmingham City Council, 2011f, 2011a; Tyne & Wear Archives & Museums, 2011b: 12). Rather than out-sourcing, TWAM brought benchmarking and

exhibition creation in-house to save money (Tyne & Wear Archives & Museums, 2013b).

A number of services hoped to reduce energy consumption and associated costs. For example, Bath Heritage Services hoped to capture more energy from the thermal springs to reduce energy consumption and St Albans Museum hoped to install solar panels (Bath Heritage Services, 2010; St Albans City and District Council, 2012a). Doncaster Museums report seeking expert advice on how to reduce energy consumption and costs and Nottingham Museums hoped that to more tightly control usage (Doncaster Metropolitan Borough Council, 2010b; Nottingham City Council, 2009). However, energy costs were high for the Cromwell Museum and thought impossible to reduce due to the nature of the listed building (Julie Cole Consultancy, 2014).

None of the sample LAMs were found to have adopted a specific efficiency method, such as LEAN. However, CIMS utilised a method developed by Colchester Borough Council in collaboration with a consultancy, that they termed Fundamental Service Review (Colchester Borough Council, 2010c). The model was described as providing a systematic and consistent way of looking at services and was to be applied to the museums service with a view to making £100,000 of savings through using resources more effectively (Colchester Borough Council, 2010c, 2010b). Similarly, Bath Heritage Services was involved in finding efficiencies as part of a the wider LA, through redesigning and standardising processes between the different services, and ensuring that tasks are done correctly the first time (Bath & North East Somerset Council, 2011c). In neither case was it possible to understand the impact of these methods. Leicester City Museums were affected by council-wide efficiencies as well, as the IT budget was centralised to save money overall (Interview 2). Though this had a negative impact on the museum service's budget, the interviewee recognised that they could not have delivered something cheaper alone (Interview 2).

### *Challenges*

It is notable that initial funds are often needed to create efficiencies. For example, TWAM sought capital investment to increase energy efficiency (Tyne & Wear Archives & Museums, 2012d), and CIMS sought funds from ACE and a regional improvement fund for their Fundamental Service Review (Colchester Borough Council, 2010a). Consultancy was used in a number of places, such as Uttlesford and Doncaster (Doncaster Metropolitan Borough Council, 2010b; Interview 7). A further difficulty encountered by LAMs in making savings is that reviewing and restructuring services

takes time. Assumptions about how the service would meet the reduced budget did not always pan out, which for CIMS led to a budget deficit of £83.5k in 2013-2014 (Colchester & Ipswich Museum Service, 2012a).

Babbidge believes that the majority of museum expenses should be used in providing services, and that administrative costs should be managed carefully as not to jeopardise the financial ability of the organisation to deliver services (2006: 3). However, following a few years of budget cuts, LAMs tended to consider that they were operating as efficiently as they could, as per studies of austerity for LAs overall (as discussed in Section 4.3.1) For example, the interviewee for Bath Heritage Services claimed that their staff costs were already to lowest in the country amongst their peers (Interview 8). By 2011, Birmingham Museums and Art Gallery considered there to be limited opportunities for efficiency savings remaining (Birmingham City Council, 2011b). They reported that continued cuts could be expected to have a negative effect on performance, income generation and customer satisfaction, due to efficiencies having already reached their potential for cost saving (Birmingham City Council, 2011b, 2011f). CIMS also report having been able to absorb early cuts, but lacking further efficiency savings to continue (Colchester & Ipswich Museum Service, 2010d), and TWAM expect customer service to be affected (Tyne & Wear Archives & Museums, 2011a). In this respect efficiency savings are leading on to retrenchment. For example, reducing staffing in Welwyn Hatfield is described as an efficiency saving, but the result is reduced opening hours and fewer exhibitions and therefore a reduced service (Welwyn Hatfield Borough Council, 2011a).

### *Positive Outcomes*

Improved planning was reported as a necessity in Worcestershire due to reduced staffing. New activities could not be arranged quickly due to resource availability and required advance planning (Interview 11). Staff in Worcestershire noted that the situation had been a learning curve in terms of what they could and could not do and how they should deliver services. As a result, strategic planning and expressing priorities was thought to have improved (Interview 10). Woroncow explains that planning gives museums a clear picture of their needs and makes it easier to bargain for funding both from the LA and externally (Woroncow, 1994: 108). Another interviewee hoped that having become more efficient, they would be able to make better use of additional funding if it became available (Interview 12). Staff in Elmbridge also expressed that the situation had forced them to consider their offer and how it was delivered and had been positive in that respect (Interview 3).

## **9.2.2 Working Opportunistically**

Some LAMs in the study reported that they were actively mitigating the impact of cuts by looking for new opportunities. For example, in their strategy it was apparent that CIMS were pursuing multiple directions. Their 2012 goals for becoming a resilient organisation include:

Expand[ing] on opportunities to draw on a wide range of external funding opportunities [...] (Colchester Borough Council, 2013c)

The interviewee further described their aim as to be flexible so that they could address opportunities as they arose, particularly national trends and opportunities from ACE (Interview 9). Birmingham Museums also reported the need to stay open to potential emerging agendas (Birmingham Museums & Art Gallery, 2009c).

In order to take opportunities an organisation requires a degree of agility. The literature about organisational agility, however, recognises that being agile requires excess capacity despite the inefficiency of maintaining redundancy - there is an opportunity cost of being agile (Teece et al., 2016: 15, 30). Teece et al. argue that in uncertainty, organisations must focus on the long-term and therefore avoid short-term cost cutting and attempts to optimise processes - efficiency - in favour of innovation (Teece et al., 2016: 20). For LAMs, though, efficiency is demanded and cuts must be made in the short term, which inhibit their ability to innovate. Further, I discussed in Section 8.1.1 how LAs are risk averse and therefore resistant to change and innovation (Babbidge, 2015: 23). The ability of LAMs to make changes to support themselves is therefore limited. Certainly, the majority of LAMs in England have not changed their governance or management (Section 6.3).

Ashley argues that it is easier to introduce change through projects as they can have specific objectives and sit somewhat outside of complex internal bureaucracy (Ashley, 2007: 487). Project working enables an organisation to trial different initiatives. The examples of being opportunistic in this study centre on bidding for external funding to support specific activities and finding partners to collaborate with, both of which can be structured as projects. Project funding can also bring in additional staff, which somewhat mitigates the impact of the immediacy of cuts on staffing. Stanziola reports having a flexible workforce as an aspect of organisational sustainability (Stanziola, 2011: 115). Flexible staffing, whereby only the bare minimum is kept in-house means that management can make direction-changing decisions without maintaining in-house redundancy (Teece et al., 2016: 23). I discussed examples of project work with

temporary staffing in Section 7.3.2. However, bidding for funding is a significant draw on staff time, something that I will consider further in Chapter Ten.

### *Risks of Opportunistic Working*

The risk in the approach of trying to appeal to everyone and take every opportunity is that museums do too much with too little and therefore do nothing well. Interestingly, despite the expressed and documented commitment to looking for varied opportunities, in relation to Renaissance funding the interviewee for CIMS critiqued the programme as meaning that they tried to do too much:

[...] it meant that we did sometimes I think shoot off in all sort of different directions, chasing different groups and different activities [...] it wasn't necessarily a strategy which was building over time [...] (Interview 9)

They also considered maintaining relevance to LA objectives as important so that access to LA budgets was maximised (Interview 9). This suggests that LAMs are keen to please as many stakeholders as possible, and risk pursuing more objectives than can be handled. The interviewee for Saffron Walden Museum expressed this directly:

I think we're in danger of being a bit of a scattergun, trying to do too much, doing too much with too little, and it's very difficult to be able to, to be allowed to focus on something and really drive it through. (Interview 7)

Nonetheless, this strategy is pragmatic as it is pursued with the aim of remaining funded by the LA and diversifying funding streams to supplement this income and develop resilience (Interview 9). Again, I will look further at diversified funding in Chapter Ten.

### *Mitigating the Risks*

Having foresight and strategy, as in the form of a forward plan, enables an organisation to judge the suitability of opportunities (Day and Babbidge, 2008: 2). Further, mitigation of this risk may come from balanced management. The manager of each team is represented on the senior management team at CIMS (Colchester & Ipswich Museum Service, 2008a). All elements of the service in Bath are represented in the senior management team, and the culture is such that all managers take responsibility for all issues. The team includes the first person to receive the MA diploma in a commercial role due to the need for them to understand museum working (Interview 8). This strategy was part of maintaining balance between the different aspects of the service:

Every circumstance is different, but I think the principle that you shouldn't let any one area dominate is probably a sound one, you know, the realities of this world are that you can't turn you back on commercial opportunities, you just can't. (Interview 8)

There were examples of LAMs mitigating the impact of short-term funding cuts by putting resources in place that could be used in the long as funds were available. For example, in Leicester the loss of Renaissance funding meant the loss of the education and outreach team. The service therefore applied for funding for display cases for 3 local libraries, so that outreach projects could be opportunistically undertaken when funding was available:

So there's different ways of doing things, and part of the creativity of my job is to, you know, it's what happens when things are going wrong not what happens when things are going right that shows your true mettle, and I think it's a very very creative process, ensuring that we maintain our core values in adversity. (Interview 2)

### **9.2.3 Working in Partnership**

#### *Collaboration with other Sectors*

Colchester and Ipswich Museums report that:

[...] strong partnerships [...] are essential to enable the Museum Service to work effectively with a wide range of different audiences and challenge and support us to explore innovative and new ways of working. (Colchester & Ipswich Museum Service, 2009d)

Partnership between LAMs and other local arts and leisure organisations was a common theme. In practice, collaboration was commonly seen in the form on co-operative marketing. For LAs this was considered beneficial as a more effective and efficient way to promote the locale as a whole For LAMs it is beneficial as it enables them to reach audiences that may not otherwise have encountered the museum. ACE appear to be advocating collaboration with the wider arts sector, and require it for some funding schemes, and this was part of the 2016 culture White Paper (DCMS, 2016: 34; Interview 9; Nottingham City Council, 2012b).

The interviewee for CIMS stated that they would like to collaborate more with the Arts sector and pursue marketing in collaboration with the leisure sector, as this would benefit all parties by encouraging the sharing of audiences (Interview 9). The council



also suggested this, by CIMS having advertising on their website and advertising themselves on other regional websites (Colchester Borough Council, 2009a, 2013b).

In Leamington Spa, the museum service had a half-time marketing post who happened to also work part-time for another local venue, enabling informal 'joined up' marketing to some extent. Nonetheless, consultants for the museum recommended greater cooperation with other heritage and leisure venues in the area. The service was keen to promote itself alongside the other tenants in the building, which included the tourist information centre, a café, and a hireable venue (Interview 5).

Museums Worcestershire reports forging links with local tourism organisations due to 'a cultural shift towards marketing and tourism' (Worcestershire County Council, 2012a). They were advised to provide a 'more joined up approach to connect museums and heritage sites', and to participate more in regional events, such as festivals (Worcestershire County Council, 2013b, 2013a). Birmingham Museums Trust reported an aim of greater collaboration across art forms, with an umbrella cultural organisation, Culture Central, having recently been formed in the city (Interview 14). Their 'creative' partnerships were credited with extending the reach of the service to global audiences and with enabling deeper engagement (Birmingham Museums Trust, 2013a).

Initiatives and strategies were developed to pursue this aim. A board was set up in Waltham Forest to co-ordinate marketing for all cultural services (Waltham Forest Council, 2013a). The newly developed marketing strategy in Epping Forest looked to work in partnership with neighbouring attractions and other partners (Epping Forest District Council, 2009b). The Cromwell Museum Trust hoped to market itself as part of the wider Cromwell/Civil War trail in the region (Interview 1).

Lacking in organisational documentation and interviews were details of actions that had been taken towards coordinated marketing and outcomes from such schemes. One of few clear examples was in Bath, where a campaign to attract retired couples was developed along with Thermae Bath Spa (Bath Heritage Services, 2010). There was a sense that LAMs did not have the skills or capacity to take forward such initiatives, and as a result they were discussed as things that should be, but are not currently done:

[...] we've got a very successful concert hall, private philanthropy for the local secondary school, international class concert hall, a £10 million project, you get that size of audience for Arts here now, they've got a very successful local cinema, community cinema [...] it's a sort of area where there are the audiences, we should be able to be getting our

developments done and being able to work as part of that local scene.

(Interview 7)

Beyond marketing, TWAM partnered with John Lewis to deliver commercial customer service training to staff (Tyne & Wear Archives & Museums, 2009). They formed a working group of business mentors to provide information consultancy on customer service and income generations (Tyne & Wear Archives & Museums, 2010b). This novel approach was associated with increased commercial performance. More traditionally, the interviewee for Leamington Spa Art Gallery and Museum described partnerships as tending to be for exhibitions and events (Interview 5).

Bazalgette recommends partnerships with universities, noting that they are increasingly collaborating with arts organisations (Bazalgette, 2016: 5). The interviewee for CIMS described how they were in the process of collaborating with a regional university on a vocational museum studies degree. They considered this positive for the service, as they would receive a portion of the students' fees, increased capacity due to the students helping with events and activities, and an incentive to keep in touch with sectoral best practice (Interview 9). In return, students would gain more practical skills and experience in comparison to a standard museum studies degree (Interview 9). It would be interesting to assess the success of this partnership once it implemented.

### *Collaboration between Museums*

Collaboration with National Museums was valued in Blackpool as delivering high profile exhibitions and events. They report work with the V&A, the British Museum and the Hayward Gallery (Blackpool Council, 2007b, 2009a). However, in St Albans, partnership with the British Museum was reported as giving them use of a retail stock management system (St Albans City and District Council 2015a). This matches the advice of Waibel and Erway, who suggest collaboration between museums as a way of enabling access to technology that one museum alone would not have the resources to support (Waibel and Erway, 2009: 334). Further, Janes reports that collaboration and commercial ventures were related at Glenbow. For example, space was rented to another museum on a pay-as-you-go basis (Janes, 2013b: 39). In this study, the large service of TWAM offered their retail purchasing service to smaller museums without the necessary in-house capacity (Interview 13). In this way, TWAM aided smaller services but also generated commercial income.

One way in which ACE have been supporting museums is through supporting the initiation of the English Civic Museums Network. The interviewee from Birmingham endorsed participation in this, and described it as a forum in which museum

professionals can discuss common interests, in particular smaller museums that were excluded from the existing National Museum Directors Conference (Interview 14).

I saw in Chapter Two that there have been frequent calls for improved collaboration and coordination between museums. In 2012, Heritage Counts advised that heritage organisations create mutually beneficial partnerships for knowledge transfer (English Heritage, 2012: 5). However, the participants described sharing knowledge and experience as something they were already good at. For example, for Saffron Walden Museum, participation in the SHARE network in the Eastern regional was helpful for training, knowledge and expertise (Interview 7). Birmingham Museums Trust reported informal partnerships for benchmarking and discussion between other services such as TWAM and Derby, the latter due to sharing a similar approach (Interview 14). CIMS reported sharing experience and expertise with other museums nationally and internationally, reporting visits from and collaborations with a variety of other museum staff (Colchester & Ipswich Museum Service, 2009d, 2010b, 2011a).

In particular, an interviewee for Museums Worcestershire perceived that museums have always been very good at working together due to the history of managing with limited resources (Interview 11). They considered sharing evaluation with other museums of great importance (Interview 11). Heritage Counts stressed that heritage organisations should not see each other as competitors (English Heritage, 2012: 5), but the Worcestershire interviewee raised concerns that if funding continued to fall then museums may be forced to be more competitive with each other and therefore less altruistic (Interview 11). This concern is noted in literature about LA commissioning: that the market driven ideology emphasises the need to compete and has been seen to jeopardise the culture of cooperation between organisations (Rees, 2014: 54).

#### **9.2.4 Working Harder**

The MA survey in 2013 found that 40% of respondents felt that the quality of their service would improve over the next year, compared to 13% reporting this in 2011. They reported that this was commonly perceived to be due to the hard work and dedication of staff (Evans, 2013: 14). Certainly, an interviewee for Museums Worcestershire praised the services' management for their commitment and hard work, noting that they had maintained aspiration for the service, meaning that it had a number of large projects ongoing and had successfully navigated changing circumstances, needs and priorities (Interview 11). Leadership is considered a key element of change management, with the leader tasked with articulating the vision and influencing employees (van der Voet, 2014: 375; van der Voet et al., 2015: 292). In the

public sector in particular, leadership is considered key in navigating the political environment's power relations (van der Voet et al., 2015: 292). The interviewee for TWAM agreed that clear and resilient leadership had been essential in championing the vision of the service to staff and other stakeholders (Interview 13). The interviewee for Birmingham Museums Trust, however, attributed their resilience to the skill and dedication of staff at all levels (Interview 14).

### **9.2.5 Passivity**

While most LAMs in this study were active in adapting to circumstances, there were cases where the response was passive or had not got beyond the thinking stage. For example, the interviewee for Saffron Walden Museum acknowledged that the museum should become more proactive about fundraising, but at this time was relying somewhat passively on LA support and occasional donations (Interview 7). However, the service was held back by the lack of staff time and connections (Interview 7).

In Leamington Spa, the interviewee acknowledged the likelihood of needing to become less dependent on LA funds, but it was apparent that planning was at an early stage (Interview 5). Similar language, indicative of a passive response to the likelihood of cuts, is evident in the MA cuts survey from 2015:

I expect we will be looking at closures of some description [...] Charging for sites we don't charge for now is obviously a possibility [...] (Museums Association, 2015: 10)

The ACE study of LAM resilience urges LAMs to avoid procrastination (TBR et al., 2015: 29). However, a case study from the Netherlands found that public managers viewed changes as passing trends and held beliefs about the tradition of how things were done, consequently resisting change (Ehrenhard et al., 2012: 623). Inaction on the part of some LAMs may certainly be attributed to prior experience:

[...] we've seen this in the past, you know, there have been periods of austerity, there have been cuts, the council's finances have sort of waxed and waned. (Interview 5).

In these two cases, the inactive response to spending cuts appears to come from different circumstances. Saffron Walden Museum reports lacking the resources to pursue a new strategy, whereas Leamington Spa Art Gallery and Museum has not suffered significant cuts yet and feels that LA finances are cyclical, leaving them waiting to see if they need to act. To some extent the latter correlates to the findings in Chapter Two, with LA priorities and finances changing back and forth over time. While

the expectation for LAMs to generate their own income has been around since at least the early 1990s, commentators argue that LAMs lack incentive to diversify their funding due to experiencing stability (Andreoni and Payne, 2003: 793; Babbidge, 2006: 3; Bakhshi and Throsby, 2010: 10; Kawashima, 1999: 158; McLaughlin and Osborne, 2002: 8–10; Méndez-Carbajo and Stanziola, 2008: 168; Stanziola, 2011: 119). This seems to be the case for Leamington Spa Art Gallery and Museum.

## **9.3 Operations**

### ***9.3.1 Public Programmes and Temporary Exhibitions***

Museums Worcestershire reported that hosting the Laura Knight exhibition in 2012:

[...] Signalled a change in the public perception of the building as a visitor destination and allowed us to demonstrate the economic benefit of high profile exhibitions and events. (Worcestershire County Council, 2013e)

In other words, this temporary exhibition attracted visitors and showed the council that the museum could generate income both directly and through the expenditure of visitors around the town. Indeed, temporary exhibitions and events were generally reported to LAs as successful in terms of their visitor numbers and income generated e.g. (Bath Heritage Services, 2010; Birmingham City Council, 2011a; Blackpool Council, 2007b, 2008a, 2009a; Epping Forest District Council, 2009b; Hackney Council, 2009a; Saffron Walden Museum, 2014b; Uttlesford District Council, 2014c; Worcestershire County Council, 2013b, 2013d).

Public programmes were used strategically to increase visitor numbers and generate income, giving previous visitors a reason to come again but also attracting new audiences (Colchester & Ipswich Museum Service, 2009f, 2012b; Welwyn Hatfield Borough Council, 2014c). Visitor numbers appeared dependent on events, such as in Waltham Forest where a downturn in visitor numbers at one venue was blamed on there being fewer events and increased visitor numbers in Hackney reported as reflecting public programme activities (Hackney Council, 2010a; Waltham Forest Council, 2013a). The council felt that without events, one venue in Worcester would be an 'empty vessel' (Worcestershire County Council, 2012c).

In this respect, there was evidence that temporary exhibitions were aimed at general audiences rather than niche interests. An exhibition on the Supremes was credited as attracting additional visitors to the Fashion Museum in Bath and to the Grundy Art Gallery in Blackpool (Bath Heritage Services, 2010; Blackpool Council, 2008b). In

Worcestershire, an interviewee acknowledged that they aimed to put on an 'easy to love' summer exhibition in order to raise the profile of the museum and attract visitors (Interview 10). For example, councillors noted that one exhibition on historical fashion had proved less popular with families than the previous years' exhibition on Ancient Egypt (Worcestershire County Council, 2014a). Committees specifically asked for exhibitions to be high profile. For example, famous figures were suggested in Welwyn Hatfield (Welwyn Hatfield Borough Council, 2011c). In Blackpool, coverage of exhibitions by national newspapers was specifically reported to the LA (Blackpool Council, 2009b).

Beyond attracting visitors for the purposes of boosting numbers and therefore income, exhibitions and events were noted as a strategy for diversifying audiences. In Bath they were used to attract tourists to the Fashion Museum, and a younger audience to the Bath's Victoria Art Gallery and St Albans Museums (Bath Heritage Services, 2010, 2015c: 2015–18; St Albans City and District Council, 2015a). In Birmingham, temporary exhibitions were reported as supporting a 'diverse cultural offer', suggesting that they were a way of offering programmes to appeal to diverse audiences (Birmingham City Council, 2011a).

Audience development in Birmingham is reported as having become consistent and strategic in comparison to its previous sporadic nature (Birmingham Museums & Art Gallery, 2009a). A clear theme throughout the organisational documentation is evidence of the service aiming to connect with wider (geographically and socio-demographically) local audiences (Birmingham City Council, 2009a: 2007–2010; Birmingham Museums & Art Gallery, 2009a). For example, the development of galleries about the history of Birmingham was prioritised due to demand found from public consultation (Birmingham Museums & Art Gallery, 2009b). However, the extension of 'global audiences' is often mentioned alongside local engagement (e.g. Birmingham Museums Trust, 2013a):

Learning is seen as a key way in which our collections can be made accessible and become a creative resource for the widest diversity of people and communities across the city and beyond. (Birmingham Museums & Art Gallery, 2009c)

Exhibitions were reported as attracting funds, with £1.1m raised over 5 years to support the programme in Birmingham (Birmingham City Council, 2011a). Epping Forest District Museum received external funding to develop temporary touring exhibitions of regional interest (Epping Forest District Council, 2008b). This enabled the appointment

of a member of staff who was also able to provide duty officer support (Epping Forest District Council, 2008c). TWAM report hoping to generate income by developing touring exhibitions (Interview 13).

Exhibitions and events were also associated with altruistic and access aims. For example, in Hackney they were described as community outreach, giving agency to the population (Hackney Council, 2009a). Epping Forest temporary exhibitions were noted as enabling the display of items from the stored collections (Epping Forest District Council, 2009b). In Elmbridge temporary exhibitions in community buildings, such as libraries, were planned as 'new and creative ways to make the museum collection far more accessible to the Elmbridge community' (Elmbridge Borough Council, 2014). However, in interviews this was worded as being about getting the service known by the public (Interview 3). Similarly, exhibitions in town centres were recommended in Welwyn Hatfield to both increase access to collections and encourage visits to the museum (Welwyn Hatfield Borough Council, 2014a). In Birmingham, increased visitor numbers were seen and associated with increased engagement with local communities (Interview 14). Developing learning programmes and exhibitions with capital funds were reported in terms of delivering 'new attractive offer[s] to visitors', and 'making connection[s] with new audiences' (Birmingham Museums Trust, 2013a). The former statement sounds like the focus is visitor numbers, whereas the latter implies that it is about widening participation. In Blackpool, while the public programmes had a strong outreach element, activities at the Grundy Art Gallery focused on audience development, especially encouraging family visits (Blackpool Council, 2010a). This suggests conflict between the aims of generating social benefits and the ultimate requirement to report success in terms of visitor numbers.

These aspects of temporary exhibitions and events suggest that they have clear benefits for LAMs: they can be produced using external funding; they can increase visitor numbers and generate income; they can increase the profile of the museum, both with the LA and with the public; and they can contribute towards outreach and access aims (Frey, 1994: 333; Frey and Meier, 2006a: 408). However, they are not necessary straight forward to produce in the climate of funding cuts. For example, an interviewee described the impact of the need to fundraise for exhibitions:

[...] now you need to raise the funds to make the exhibition before you start, so your lead-in times are ridiculously long and you're doing the research 4 years before in order to fill out the paperwork to get the money. (Interview 10)

Staff in Elmbridge reported that finding staff time to change temporary exhibitions was a challenge and both Welwyn Hatfield Museums and Saffron Walden Museum planned to produce one less exhibition per year in order to concentrate on marketing and fundraising (Interview 3; Interview 7; Welwyn Hatfield Borough Council, 2011a: 12). The interviewee for Saffron Walden Museum felt that they needed to cut down their public programmes so that staff could focus on collections work, which they considered the foundation of the future of the service (Interview 7). However, visitor numbers were reported as being associated with the activity programme and the interviewee perceived that the LA was more interested in public programmes than collections work (Uttlesford District Council, 2013b). They showed awareness of the need to maintain a programme in order to maintain public support (Interview 7). The interviewee for TWAM also raised concern over collections work, stating that public programmes were a necessary focus (Interview 13).

### **9.3.2 Schools**

As discussed in Section 7.2.1, number of services reported that school visits had declined due to pressures on school budgets (e.g. Colchester Borough Council, 2014a; Elmbridge Borough Council, 2010; Interview 11; Tyne & Wear Archives & Museums, 2011a, 2012a). Organisational documentation shows that LAs are keen on school visits. For example, committee members in Dartford wanted the museum service to be used more widely by schools, indicating that this was a key value of the service for the LA (Dartford Borough Council, 2008a). The service was told to make more effort to encourage schools to use the loans service so that children would want to visit the museum itself and bring friends and family (Dartford Borough Council, 2006). However, there was no discussion of how this could be achieved. As discussed in Section 8.2.3 this LA appears to want more from the museum but cannot justify the expenditure to enable change. The committee at CIMS also appeared to be particularly interested in school visits, but in this case there were practical ideas: a councillor suggested that area committee funding could be sought to assist schools with transport costs, making the service more accessible (Colchester Borough Council, 2014a, 2014b). Another scheme designed to encourage school utilisation of museum services was initiated in Elmbridge whereby schools received access to resources across the year for an annual fee (Elmbridge Borough Council, 2014).

For TWAM, loan boxes were fully booked despite drops in on-site visits, suggesting that schools remained keen to use museum resources (Tyne & Wear Archives & Museums, 2011a, 2012a). However, difficulty in engaging with schools was mentioned



in Worcestershire in relation to the move to academies. The interviewee found academies harder to engage with due to breakdown of LA networks (Interview 11). Curriculum changes were also a concern. Burton notes that relying on school visits is risky due to regular changes in the curriculum (Burton, 2007: 121). An interviewee for Museums Worcestershire highlighted that lack of resources reduced their flexibility in dealing with curriculum changes (Interview 11). The change in the national curriculum also created a need to redesign school sessions for CIMS, where there was concern that Egyptian history may be removed from the national curriculum, causing a drop in visits to the Egyptian Gallery in Ipswich (Colchester & Ipswich Museum Service, 2009c, 2013a). Curriculum change was thought to have provided an opportunity for the Cromwell Museum, however, as it now required the study of an individual of local importance (Interview 6).

This highlights that maintaining a schools service is labour intensive. School visit figures in St Albans were thought to be related to the nature of the temporary exhibition (St Albans City and District Council, 2015a), suggesting that there are considerations to be made across the service. CIMS, Welwyn Hatfield and TWAM work to maintain close relationships with schools, reporting instances of attending school conferences, arranging teacher training events and otherwise engaging with schools (e.g. Colchester & Ipswich Museum Service, 2009e, 2012b; Tyne & Wear Archives & Museums, 2009; Welwyn Hatfield Borough Council, 2014b).

Before the closure of the museum, the service in Elmbridge was reported to have too small a space and to be further limited by cost pressures on schools. The council thought that a mobile education service would be innovative, would increase access and reduce costs to the LA (Elmbridge Borough Council, 2010, 2011a). The re-launch of the schools service following the museum's closure was geared towards the national curriculum (Elmbridge Borough Council, 2013). An interviewee noted that the museum's closure was associated with a drop in work with some schools and an increase with others: those with close proximity to the museum site liked to be able to visit, whereas the outreach-based service was better for schools further away (Interview 3). This demonstrates how one approach does not necessarily work for all members of an audience group.

### **9.3.3 Access to Stores**

Collections work was commonly rationalised as enabling access to stored collections, suggesting that LAMs perceive this as something LAs value. For example, Bath received funds from the ACE Designation Development Fund for areas of the Fashion

Museum collections. As well as documentation and conservation, the project would include putting information online and providing training opportunities (Bath Heritage Services, 2014). In committee papers they stated:

We need to eradicate the documentation backlog so that there is knowledge of what is in the collection and where it is located so that we can ensure that the collection is more widely accessible. (Bath Heritage Services, 2014)

Similarly, in Blackpool, a collections review was reported as part of a long-term plan to 'make Blackpool's heritage more accessible to more people.' (Blackpool Council, 2007c). The recruitment of a collections manager was partly intended to make the collections more accessible through online access (Blackpool Council, 2015b). Committee minutes from Worcestershire hint that councils do value collections access, with councillors responding positively to reports of an increase (Worcestershire County Council, 2011d). However, access to collections for research stopped in Elmbridge due to lack of facilities since the closure of the museum, and interviewees believed that the council did not see resolving this as a priority (Interview 5).

Access to stores is also encouraged by external funding. For example, public tours were a condition of an HLF grant to Saffron Walden Museum for a new store. When staffing at the museum reduced, meaning that opening the stores to the public would not be viable, HLF withdrew the funding (Interview 7).

While improving access in Birmingham was associated with enabling the 'intellectual exploitation' of the collection (Interview 14), the interviewee for CIMS gave a pragmatic reason for improving the visibility of stored collections:

[...] if you're doing good work but no one knows about it then you're vulnerable. You're either an asset or you're not, so having hidden elements of the museum and the back of house [...] is really vulnerable. (Interview 9)

Access projects may therefore be beneficial for LAMs: external funding may be available for them; they enable the improvement of documentation and increase knowledge of the collection; the value and utility that the LA derives from stored collections may increase, reducing the risk that they will be perceived as redundant.

In Worcestershire, temporary additional space was made available to the service. Due to a limited budget and uncertainty about how long the space would be available, the service undertook collections work that visitors could watch (Interview 10). Consultants

considered options for the future of the space, but in the interim the opportunity of space was used proactively, for public facing activity, with little cost. This work appears in line with the assertion of the CIMS interviewee. However, there was no tangible outcome from it: the museum was not able to retain use of the space and pressure on space in their stores remained (Interview 10).

### **9.3.4 Maintaining Services with Fewer Resources**

There was evidence of LAMs looking for ways to run services at a lower cost and requiring less staff time. A strategy employed by Museums Worcestershire was to combine events into extended programmes. So while it appeared that there were fewer events, the service managed to increase visitor numbers (Worcestershire County Council, 2012c). However some events were dropped due to reduced staff and resources (Worcestershire County Council, 2014b).

While Saffron Walden Museum and Elmbridge Museum both suspended their enquiries service, other services found that they were able to redesign their delivery to increase efficiency in terms of staff time (Interview 5; Interview 7). For example, in Worcestershire, instead of responding to enquiries as and when they came in, they were trying 'public enquiries days' in order to concentrate this element of the service (Interview 10).

Efficiencies were often associated with digitisation. For CIMS, research enquiries had increased due to the growth of collections information available online, but the time needed to respond had fallen due to the digitisation of collections information (Colchester Borough Council, 2012a). An interviewee in Worcestershire hoped that digitising collections would enable 'self-help' enquiries (Interview 10). Digital projects were also associated with facilitating engagement with users and stimulating visitor numbers. Birmingham's digital services, including websites and social media, were credited with reaching new audiences and raising the service's profile (Birmingham City Council, 2011a). In Epping Forest, the growth of museum service user numbers was reported as largely due to the website, including a new local history website and the development of a new website with interactive content was hoped to encourage repeat visitors in Elmbridge (Elmbridge Borough Council, 2013; Epping Forest District Council, 2009b). In Worcestershire, a new website promoting school services across regional museums was part of the effort to increase engagement with schools (Interview 11). TWAM also developed a website for schools to aid communication (Tyne & Wear Archives & Museums, 2010a). Bakshi and Throsby argue that cultural organisations must embrace the 'digital revolution' due to its impact on the way culture is consumed

by the general public (Bakhshi and Throsby, 2010: 10). While small museums may struggle with the money and skill required to capitalise on the potential of technology, these are often awarded external funding as long as they are associated with access (Cole, 2008: 187).

## 9.4 Discussion

There were two Trusts included in this study. A major reported factor in the council's decision to devolve Birmingham Museums was to enable savings without detrimental effect on service provision. Where Trust status was considered elsewhere, it was rejected due to expectations that it would not save the LA money in the short term. While literature on museum Trusts shows that short term savings are not likely and are a poor basis for choosing devolution, it appears that this remains the primary reason that LAs consider the move. In part, however, this may be attributed to the financial situation of LAs and therefore their urgency in finding ways to make savings.

The Cromwell Museum was devolved due to Cambridgeshire County Council's decision to defund the museum entirely and Trust status presented as the only acceptable alternative to most stakeholders. Further, Huntingdon Town Council's decision to provide some support to the museum seems to come from the desire to retain usage of the historic building rather than to retain the services of the museum. This case correlates with the Leicester interviewee's assertion that museums were devolved when LAs were not interested in them. I saw in Section 8.2.1 how committee papers showed little connection between the museum's activities and the LAs priorities, leaving us to question whether the museum failed to communicate its worth or the LA did not listen. With the other small museums in the sample rejecting Trust status as unviable due to their scale, it would be therefore interesting to follow the fortunes of the Cromwell Museum Trust beyond the timescale of this study.

In Section 8.2.2, I showed that LAMs often express their value to LAs in terms of reputation. Here, there is one suggestion that LAs value the 'good news' potential of museums: though consultancy supported Trust status for Bath Heritage Services, the interviewee thought that the LA wished to retain its reputational benefits. In other cases, however, capital projects with high publicity were aimed at creating a sustainable business model for future devolution.

The Cromwell Museum hoped to benefit from the range of trustees that were appointed to bring different skills and experience. Of possible interest to LAMs is the method used by Bath Heritage Services where an advisory board of external experts is used to give

weight to their plans and decisions in the eyes of the LA. Birmingham Museums Trust did report having increased their non-LA income due to the relative freedom offered by Trust status. They also benefited from reduced bureaucracy but felt constrained by the short-term nature of their arrangement and uncertainty over the expectations of the LA. In comparison, the joint services in the sample benefited from having a joint committee, as they provided direct contact with LA decision makers and moved quickly due to delegated powers. Joint services also benefited from increased scale, both by increased coordination reducing duplication of effort and by increased access to national funds aimed at regional leaders. Increased coordination was one reason that Birmingham Museums Trust was expected to make savings by merging with Thinktank, and the combined service was hoped to offer an 'enhanced package' to funders and visitors, similar to the main benefits of the joint services.

The two main concerns for joint services are that they cut services off from their local communities (though this was not apparent in organisational documentation or interviews) and communication issues. Further research would be necessary to ascertain if this was the case. Poor communication was one factor attributed to the decision by Sunderland Council to leave the joint service of TWAM, and all other cases described complications of working with more than one LA. Taking into account differing political and cultural priorities, building relationships with multiple communities, and dealing with differing service level agreements were among the complications highlighted by interviewees.

As with Trust status, the majority of alternative business models considered in looking for ways to cope with austerity were rejected. In a number of cases it was apparent that alternatives, such as combining complementary services such as libraries, may have been viable if it were not for the speed and severity of spending cuts. Alternatively, this may relate to the low level of risk-taking associated with LAs (Section 8.1).

I found that external funding was often required to enable changes, such as efficiency savings, adding to the effort required. However, I also saw that some services acted passively to the cuts, not moving beyond thinking about changes that they may need to make. In one case this was due to lack of capacity but in another it was due to the perception of LA finances as cyclical. These findings complicate the arguments that museums have operated in a fairly benign and stable environment, feeling entitled to public money, and therefore have lacked incentive to make changes (Andreoni and Payne, 2003: 793; Babbidge, 2006: 3; Bakhshi and Throsby, 2010: 10; Méndez-Carbajo and Stanziola, 2008: 168; Stanziola, 2011: 119). Babbidge agrees that there is little evidence of new business models being adopted by museums, positing that risk,

cost, complexity and incompatibility with core mission are disincentives (2015: 25).

Findings of this study are that the restrictions on LAMs making changes include:

- The low risk tolerance of LAs;
- The lack of incentive for LAs to give freedoms to LAMs due to the reputational benefit of having LAMs and the lack of short term financial savings of devolution;
- The perceived lack of viability of other business models;
- The lack of skill and resources from LAM employees to drive changes through;
- The lack of internal funds and therefore need for external funds to make changes.

There was some evidence that the constraints on museums may have positive outcomes by forcing LAMs to fundamentally consider the things that they offered and mechanisms used to offer them, resulting in greater efficiency and effectiveness. However, the need to look for opportunities risks 'doing too much with too little', effectively doing nothing well and providing a fragmented, inconsistent service. In the larger organisations, such as CIMS, Bath Heritage Services and TWAM, this was mitigated by having a representative senior management team, all with understanding of commercial issues. Again, this is an area where detailed research beyond the scope of this study would be of use.

Of concern is that while there were a number of instances in which LAMs were advised to co-ordinate their marketing with other cultural organisations to increase efficiency and effectiveness, there were few examples of this occurring. In contrast, despite the frequent calls for the greater collaboration in the museums sector, the case studies provided many examples of this taking place and interviewees argued that this was something that they were good at.

High profile public programmes, including temporary exhibitions, were used by case studies strategically to increase their profile, attract visitors and generate income. They were a necessary focus for many of the cases, despite concern that this was to the detriment of collections work. Programmes were aimed at a general audience, with popular topics requested by LAs. There was some confusion between local audience and wider reach, and between generating income and widening participation, which is compatible with the findings of Section 8.2.2, with visitor numbers and earned income the dominant performance measures despite altruistic aims. However, the interviewee for TWAM considered that local audiences and wider visitors did not need a different

approach, and that generating income through temporary exhibitions was preferable to local audiences needing to travel for exhibitions (Interview 13). While access for the wider public was somewhat hijacked by the need for impressive numerical performance, some LAs seemed keen to engage with schools for the benefit of the schools rather than the museum. Overall, engaging with schools was challenging for LAMs, requiring significant resources to keep up with changes to the national curriculum and to build relationships with teachers.

Both public programmes and collections access projects were often funded by external sources. The latter in particular was required by external funders, but seen pragmatically as a way for LAMs to demonstrate the value of assets that would otherwise be hidden from the LA in stores. External funds seemed necessary for all work beyond the bare bones of opening the museum to the public, showing that if museums want to retain their value in the eyes of the LA they must focus on bidding for funds for visible projects.

## 10 Coping: Diversifying Income

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In this chapter I look at the sources of income being utilised by LAMs. I look at their relative importance in the sample cases and consider the potential of different sources in comparison to their current use, the implications and obstacles associated with them.

Firstly, I summarise the concept of income diversification, noting that while this has come to prominence following the economic crisis, it is not a new concept in the sector. I look at whether LAs can support LAMs beyond revenue funding, finding that there is ongoing research into cultural commissioning but that there are significant challenges. I then look at fundraising, noting that the sampled LAMs do not have confidence in corporate giving and consider HLF the default source of capital funds. Finally, I look at income generated from commercial endeavours and find that the larger services have more potential to commercialise their assets.

### 10.1 Diversifying Income

Diverse sources of income make an organisation more stable (Carroll and Stater, 2008: 962). This is because different sources of income are affected by different factors meaning that while one may decline another may increase, maintaining overall stability. For example, while public funding has decreased during the economic crisis, domestic tourism has increased meaning that museums might benefit from an increase in visitors and therefore income from sales. However, it does so with diminishing returns (Lindqvist, 2012: 7). While it appears advisable for museums to diversify their portfolio of income sources, it is not a race to obtain the most diverse portfolio possible. Additionally, the more income sources an organisation has, the more activities it will need to undertake to manage them, increasing administrative costs. This will be particularly burdensome for small organisations for whom it could represent a large proportion of their activities. Each income stream is essentially a stakeholder in the organisation, often with varying and sometimes disparate aims to satisfy with its operations. This poses a risk that the organisation will stray from its intended mission to fulfil the requirements of each stakeholder (Carroll and Stater, 2008: 947).

Do museums currently lack diverse incomes? Some commentators feel that publically funded cultural institutions have operated in a fairly benign and stable climate for a long time resulting in a lack of incentive to diversify (Andreoni and Payne, 2003: 793; Babbidge, 2006: 3; Bakhshi and Throsby, 2010: 10; Méndez-Carbajo and Stanziola, 2008: 168; Stanziola, 2011: 119). There is also evidence of a sense of entitlement, with a survey finding that museum managers feel that they deserve public money and that



they will be rescued if they have financial difficulties due to their importance to society (Babbidge, 2002: 1; Stanziola, 2011: 114). However, museum managers have also reported that they lack the skills to diversify their funding and that there are few training courses for such financial management issues (Stanziola, 2011: 114, 124–126). Again, this is likely to be a particular issue for small organisations where there are a limited number of staff and therefore a smaller range of specialist skills.

Nonetheless, it is likely that more people will come to agree that those who use services such as museums, and those who believe they should exist, should pay for them (Babbidge, 2009: 22). As such, a recommendation for the future of the heritage industry is that support should be given to organisations in diversifying and maintaining a portfolio of income streams in order to reduce their reliance on public funding.

## 10.2 Local Authority Funding

Many interviewees argued that they had to retain LA funding as they could not manage without it:

It's difficult to see how regional museums are going to compensate for the rapid, almost terminal, decline in public funding because no one has come up with a business model that shows where we're going to find the gap from. (Interview 14)

[...] it worries me that without the safety net of the council, the museum is not big enough to look after itself. (Interview 6)

We believe we've got a social justice mission and because we receive elements of public funding we can deliver that. If we didn't receive any public funding it would be much harder for us to do that. (Interview 13)

[...] the services of the city and county rely heavily on public funding and support to achieve their goals. The continuity of that support is vital to ensure the long term survival of the heritage. Neither service could survive the withdrawal of that funding. (Rutherford, 2009)

However, LAs around the country have reduced their spending and across a wide range of statutory duties. As non-statutory services, museums should expect ongoing cuts to their revenue budget. In this section I consider ways LAs are continuing to support LAMs and strategies used by LAMs to secure LA funds in different ways, before moving on to consider other sources of funding in later sections.

### **10.2.1 In-Kind Support**

The New Local Government Network report that LA support for cultural services is changing from direct grant giving to the practical support of helping secure premises, access funds from elsewhere, and secure community support (Harvey, 2016: 5). A report from London Councils states that 90% of London LAs support art and culture through providing subsidised space and peppercorn rents (London Councils, 2014: 6)

I found cases of LAs supporting LAMs in this way. Huntingdon Town Council took ownership of the Cromwell Museum building and leased it to the new museum Trust through a peppercorn rent agreement (Huntingdon Town Council, 2014b). They are expected to support the Museum Trust through providing some back-office functions and potentially allowing use of their IT systems (Interview 1). This is valuable support for the museum Trust, which will rely solely on fundraising and earned income.

Other cases show LAs supporting LAMs with fundraising. Doncaster Metropolitan Borough Council set up a heritage board to support funding applications and St Albans Museum reports support from the LA for their HLF bid (Doncaster Metropolitan Borough Council, 2015a; St Albans City and District Council, 2013). In a number of cases the LA showed willingness to provide match funding (e.g. Elmbridge Borough Council, 2007a)

### **10.2.2 Commissioning**

The New Local Government Network argue that LAs will increasingly stop giving grants and instead commission services forcing arts and cultural organisations have to align their services with the overall LA priorities in order to win contracts (Mansfield, 2014: 28). They argue that this is beneficial to cultural organisations as it means they are not viewed in isolation but rather as part of the wider offer and ambitions (Mansfield, 2014: 28). London Councils report that access to commissioning and partnership working for arts and cultural teams within LAs depends upon their location within the LA, recommending that links across LAs are strengthened and cultural teams given extra support (London Councils, 2014: 5). ACE have a Cultural Commissioning Programme looking at how arts and culture can support public health in local communities, and fund pilot projects in this area (Bazalgette, 2016: 6).

Both Museums Worcestershire and Elmbridge Museum discussed undertaking work in a social care setting, though this was not a commissioned arrangement (Interview 3; Interview 11). The Museums Worcestershire interviewee described the challenges of evidencing their work in care homes: the work is with small numbers of people while

numbers are the key performance indicator reported to LAs (Interview 11). It is doubtful that working with small numbers of people in ways that are difficult to evidence will be competitive in commissioning. The evaluation of the ACE Cultural Commissioning Programme found that the programme increased skills and knowledge of cultural organisations enabling them to engage with commissioning and describes pilot projects, but work specific to LAMs would be needed to see if this is something that they can benefit from (Consilium Research & Consultancy, 2016: 5–7)

Even if the LA can be convinced of the museum's efficacy, Ferry and Eckersley find that incumbent providers have a distinct advantage when bidding for commissions (Ferry and Eckersley, 2015: 206). As such, under-resourced LAMs may struggle to win contracts. Further, Rees warns that trying to win contracts is likely to cause mission drift (Rees, 2014: 57). Adding to the discussion of opportunistic working in Section 9.2.2, LAMs must have a plan to assess the suitability of opportunities and the flexibility to act upon them.

## **10.3 Fundraising**

### **10.3.1 Corporate Giving**

In 2004-2005, 13.7% of income to cultural organisations in the UK came from private sources (Méndez-Carbajo and Stanziola, 2008: 165). Is there potential for this to grow? Corporate giving generally decreases during a recession due to businesses tightening their belts to survive uncertain times. However, Arts and Business undertakes an annual survey of private sector support and investment in culture in England and reported a modest rise in private sector investment in 2011-2012 (Arts & Business, 2013: 1).

#### *Capacity, Location and Contacts*

Of the reported 13.7% of income to cultural organisations in the UK that came from private sources in 2004-2005, 70% of it went to 1.7% of organisations (Méndez-Carbajo and Stanziola, 2008: 165). Developing and managing a corporate giving scheme is time consuming and costly requiring doubling marketing capacity as donors and visitors require different marketing strategies (Mottner and Ford, 2005: 829; Stater, 2009: 204). This is challenging for organisations who are adapting to reduced LA funding, and particularly for small organisations where there are fewer staff to manage the workload (Stanziola, 2011: 119). The HLF found that capacity is a major challenge for heritage organisations in undertaking fundraising, both in staff time and skills (Heritage Lottery Fund, 2012b: 10–11). ACE, HLF and DCMS are developing

fundraising capacity in the heritage sector through the Catalyst initiative and the Museum Resilience Fund. Catalyst funds income diversification capacity-building projects and provides match funding for the development of endowment funds (Arts Council England, 2012: 1; Heritage Lottery Fund, 2012a). The Museum Resilience Fund supports capacity building projects and the development of new business models (Arts Council England, n.d.).

LAMs could form partnerships for fundraising to address capacity. They could partner with local charitable causes, such as youth organisations that would help to promote the museum as a social cause, or with other heritage organisations so that the burden of costs can be shared and the 'offer' increased to make it more attractive to potential donors (Heritage Lottery Fund, 2012b: 13).

In 2011-2012, 67.8% of business support to cultural organisations went to London, while a 2012 survey of 150 museums across Yorkshire found that only 3% of total investment came from the private sector (Arts & Business, 2013: 2; Woodward, 2012: 21). These are well-documented characteristics of private funding that disadvantage regional LAMs. Urban organisations are nearer to more sources of funding than rural organisations, and nearer to others that the funding company may wish to impress with their sponsorship; consumers, politicians etc. (Méndez-Carbajo and Stanziola, 2008: 166–167; Stanziola, 2011: 119). This issue was expressed by the interviewee from TWAM:

[...] there is only one head office of a FTSE100 company here...  
businesses are mostly branch offices, not head offices [...] (Interview 13)

As with support from within an LA, the literature commonly states that private sponsorship depends upon the interest of the decision maker or an influential senior executive (e.g Daellenbach et al., 2013: 82). Daellenbach et al. emphasise the need for the museum to develop a network within the business community and learn who to engage with (2013: 100). This can be problematic for LAMs. For example, the interviewee for Saffron Walden Museum felt that the museum society and museum staff would struggle to access high net worth networks, meaning that their fundraising remained small in scale (Interview 7). Again, as expressed by the interviewee for TWAM:

[...] a lot of local authority members if you were to ask them would say they're not fundraisers, it's not their background, they don't necessarily have the networks into high net worth individuals [...] (Interview 13)

To compensate, TWAM have an independent charity with trustees with the necessary networks (Interview 13). Similarly, in becoming a Trust the Cromwell Museum was able to secure a high profile individual as patron and the local MP as a trustee with the hope that both would support fundraising through their networks and public standing (Interview 1; Julie Cole Consultancy, 2014).

Successful fundraising may lead to decreased public funding: while DCMS claim that the revenue generated by a museum does not affect its grant-in-aid allocation, a 2004 study found that grants declined 30p for every £1 of additional revenue (Maddison, 2004: 90, 103). Frank and Geppert suggest that corporate giving should influence public funding, so that support is directed to those who do not manage to find private income, but this approach would surely disincentivise LAMs from trying (Frank and Geppert, 2004: 144).

### *The Nature of Corporate Giving*

Businesses donate to cultural organisations for a variety of reasons. Usually it is an investment by the organisation for which they expect to see some benefit, such as public relations or networking (Comunian, 2009: 205, 214; Ponzini, 2010: 513–515; Stanziola, 2007: 78; The Partnership Movement, 2014: 1–2). They tend to finance capital projects such as exhibitions, likely because of the exposure it brings, rather than support operating costs (Lindqvist, 2012: 10; Méndez-Carbajo and Stanziola, 2008: 167). One recommendation is for organisations to look at their activities and identify parts that can be described as projects or programmes, such as school programmes and weekend activities. Though these may be considered part of the day to day operation, they are easier to position to attract sponsorship (Butterfield, 2010: 156, 158). TWAM report changing focus for their fundraising towards revenue funding (Interview 13). Though beyond the scope of this project, a detailed evaluation of their methods and progress would be worthwhile.

### *Risks*

Naidoo warns about the fickleness of business sponsorship:

Businesses behave as businesses, which means that they may cut sponsorships suddenly, run enterprises at a loss, asset strip and so on.  
(Naidoo, 2015: 63)

Prior to the economic crisis, though corporate profits were high funding to the Arts had fallen (Holden, 2007: 9). Unreliable income makes long-term planning difficult (Frank and Geppert, 2004: 143).

HLF recommend that more innovative methods of fundraising are used (Heritage Lottery Fund, 2012b: 12). However, while businesses may be encouraged to give more, if there are more museums chasing sponsorship, competition will increase while the proportion each organisation receives may not. Foster argues that fundraising works similarly to advertising to customers: it operates in a competitive environment whereby you attempt to get customers to come to you rather than a competitor (2001: 167).

Sampled museums report difficulty in accessing corporate funding due to the economic climate. TWAM found that Corporate Social Responsibility (CSR) budgets were constrained, and both Nottingham Heritage and Waltham Forest reported a shortfall in private sector donations compared to estimates (Interview 13; Nottingham City Council, 2010: 10; Waltham Forest Council, 2013b).

Commentators note that sponsorship of the Arts is considered an easy way for organisations with poor reputations to improve their image. There have been high profile cases where corporate sponsorship was deemed inappropriate by sectoral commentators, such as the sponsorship of climate change content at the Science Museum by Shell and the sponsorship of the British Museum by BP (Brown, 2016; Macalister, 2015). Naidoo argues that more information is needed about what funders want in return, and Holden emphasises that museums must understand that corporate sponsorship must be treated as a commercial transaction (Holden, 2007: 9; Naidoo, 2015: 63–64). No discussion of these specific issues was found in the organisational documentation or mentioned by interviewees, with interviewees feeling like corporate sponsorship was out of reach in the first place. As such, corporate sponsorship remains rare and small-scale for LAMs.

### **10.3.2 Individual Giving**

Arts and Business claim that individual giving is the largest source of private investment in the Arts in the UK (Arts & Business, 2010: 1; Mermiri, 2010: 4). Another report finds that around one in six adults in England has donated to a heritage cause (English Heritage and Local Government Association, 2013: 12). While 'philanthropic particularism' applies, whereby certain causes are funded more than others, individuals donate to a broader range of organisations than corporate donors based on their personal interests, experiences, and fundraising campaigns (Clifford et al., 2013: 965; Gaio, 2009: 29–30; Méndez-Carbajo and Stanziola, 2008: 167). Further, in comparison to corporate donors, individuals are less likely to mind what their money is used for

(Gaio, 2009: 34–35). Individual giving appears to have the potential to be a rich source of unrestricted funds for LAMs.

Individual givers tend to be people who already visit the organisation and have a connection to it (Arts & Business, 2010: 2). Individual givers report that their first donation was instigated by simply being asked to donate, which suggests that simple methods like adding a donation to ticket price should prompt visitors to give (Arts & Business, 2010: 2; Gaio, 2009: 40). For example, CIMS improved and increased the number of public donation boxes in the museums, and for TWAM a targeted 'donations week' yielded 16% more donations compared to the previous year (Colchester & Ipswich Museum Service, 2009b; Tyne & Wear Archives & Museums, 2014c). In comparison, the interviewee from Leamington Spa Art Gallery and Museum reported that fundraising from visitors was not prioritised. While there were donation boxes in the galleries, they avoided 'the hard sell' in order to minimise barriers to access (Interview 5).

### *Costs and Commitment*

Individual giving schemes are perceived as expensive and time consuming, with many organisations feeling that they do not have the capacity to initiate them (Gaio, 2009: 36; Heritage Lottery Fund, 2012b: 10). Initiatives such as Catalyst and the Museum Resilience Fund may support their development, but the interim progress report for the programme highlighted that capacity was hindering the ability of organisations to engage with the programme (DC Research, 2016). Still, the emphasis in literature on individual giving is on personalised contact with donors and 'friend-raising', whereby the organisation works to cultivate relationships with individuals (Mermiri, 2010: 30). A small survey in 2002 showed that major donors prefer face to face interaction in soliciting donations, and prefer to talk to knowledgeable 'doers' rather than fundraising staff suggesting that all staff need to be involved in fundraising (Sargeant et al., 2002: 32–33). While individual givers generally prefer not to be publically recognised for their gift, they often cite not having received (public or private) thanks as a reason for not giving to an organisation a second time (Bowcock, 2012: 24; Gaio, 2009: 34–35). Such personalised schemes are likely to be particularly expensive to administrate.

Around 80% of museums had 'friends' schemes in 2010, drawing into question the potential for growth in this area (Mermiri, 2010: 34). They were commonly mentioned by the sampled LAMs as providing volunteers, fundraising and advocacy (e.g. Bath Heritage Services, 2015c; Birmingham Museums & Art Gallery, 2009b; Warwick District Council, 2012c; Welwyn Hatfield Borough Council, 2012c) However, they take work: St

Albans Museums discussed needing to 're-invigorate' the group (St Albans City and District Council, 2013). The Friends organisation for Elmbridge Museum disbanded after the museum closed and the interviewee explained that the group did not understand or agree with the concept of a museum service without a museum (Interview 3). The Friends of the Cromwell Museum is a relatively new organisation and they describe the level of financial support they can provide through membership fees and fundraising as limited (Julie Cole Consultancy, 2014). They also report that they should not be counted on as an automatic source of volunteers as many of them were unable to commit time to the museum (Friends of the Cromwell Museum, 2014). Support for the museum increased when it was threatened with closure but fell when the plan to devolve the museum to Trust was agreed (Interview 1; Interview 6). This suggests that continuity of support can be an issue. An interviewee thought that the organisation needed a new campaign or cause for people to back (Interview 1).

Despite this effort, one reason for investing in giving schemes is the idea that 'money attracts money'. Once a scheme has had some success it can be used as match funding for a grant, or attract business sponsorship as businesses are more likely to invest in an organisation that has proven its relationship with its audience (Heritage Lottery Fund, 2012b: 14; Mermiri, 2010: 8). Further once an individual has donated, further engagement can increase their connection with the organisation so that they donate again and again (Bowcock, 2012: 5, 21; Butterfield, 2010: 154).

As with corporate giving, according to the Arts and Business survey in 2011-2012, 89.9% of individual giving went to cultural organisations in London, and there is a clear correlation between the size of an organisation and the amount of individual donations they receive, with large organisations getting proportionately more (Arts & Business, 2013: 2; Gaio, 2009: 15). Further, a study found that urban consumers are more likely to participate in friends and membership schemes than those in rural areas (Méndez-Carbajo and Stanziola, 2008: 167).

The pool of donors who make very large donations is small and select, meaning LAMs may feel that it is not worthwhile putting effort into winning them (Arts & Business, 2010: 1; Gaio, 2009: 17). However, a small 2002 survey of major donors to arts organisations found that they often felt that organisations could have asked them sooner for gifts and could have asked for more (Sargeant et al., 2002: 37). Further, major donors tend to have contacts in business and politics, allowing them to become ambassadors for the organisation and encourage further giving (Sargeant et al., 2002: 14).



### *Potential Methods*

Bowcock recommends using digital technology to engage audiences as it increases the opportunities available to the organisation to ask for support, and can enhance the audience's experience making them more likely to donate (Bowcock, 2012: 6–13). Bowcock also notes that offering digital experiences that a visitor has to sign up for, such as a mobile app rather than an audio guide, gives the opportunity to gather information about the visitor that can be used in future fundraising efforts (Bowcock, 2012: 10). This method was used by CIMS, with the experience at Colchester Castle using augmented reality through tablets that users must sign in to. However, Tate found that while 50% of online visitors said that they would consider making a donation to the Tate after viewing the online content, in practice they did not (Bakhshi and Throsby, 2010: 7).

Nesta suggest that organisations such as ACE should invest a proportion of their funding in developing crowdfunding (Nesta, 2014: 5, 17–18). No case studies reported using crowdfunding and Bagwell et al. argue that it is a 'dangerous distraction', with the ease and benefits overhyped and the reality hard work and high cost (2015: 29). Further, crowdfunding favours populist projects, and therefore may not hold to the value of 'excellence' (Nesta, 2014: 18).

The Coalition government wished to encourage individual giving. Launched in 2011, their campaign, Legacy10, aimed to increase the number of people that leave a legacy to a cultural organisation or charity in their will so that 70% of people donate 10% of their wealth (Atkinson, 2011: 1–2). At the time the campaign was launched, only 7% of people left a legacy, which is a third of the number who do in the US (Atkinson, 2011: 4). Incentives have been put into place, such as tax changes whereby those who leave at least 10% of their wealth to a charitable cause receive a 10% discount on inheritance tax (Atkinson, 2011: 3). Birmingham Museums Trust noted having received useful bequests, but Arts and Business found in 2010 that less than 25% of museums had legacy schemes, suggesting that there is room for growth in this area (Interview 14; Mermiri, 2010: 37).

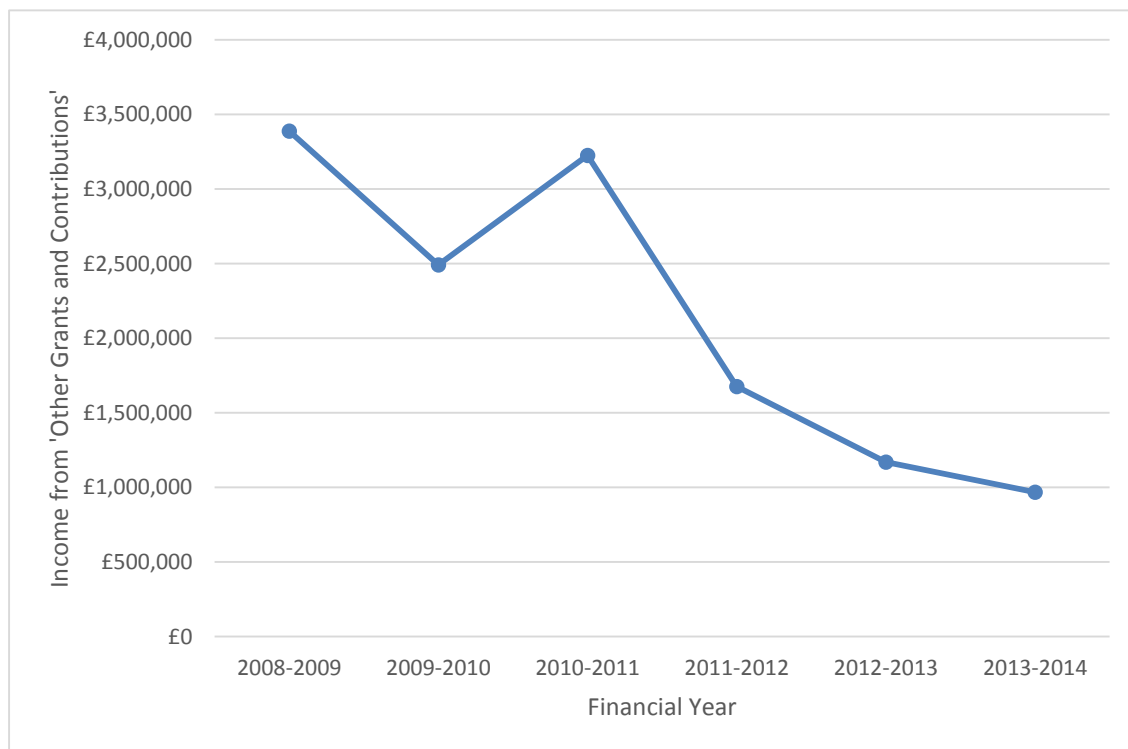
### **10.3.3      *Trusts and Grants***

A number of bodies give grants to museums, including Trusts that distribute income raised from an endowment and publically funded bodies such as ACE and HLF. In weathering cuts to their funds ACE protected front line grant giving, HLF benefited from increased lottery ticket sales during the recession, and the Arts and Business survey found a rise in the amount of funding coming from Trusts in 2011-2012 (Arts &

Business, 2013: 3; Heritage Lottery Fund, 2012c: 1). This suggests that grant giving bodies are maintaining or extending their support for the sector. However, Arts and Business believe that the extra given by Trusts at this time is likely to be in excess of the performance of their endowments, meaning that it is an unsustainable level for the future, and HLF saw lottery ticket sales fall in 2016-2017 (Arts & Business, 2013: 3; Heritage Lottery Fund, 2017: 6).

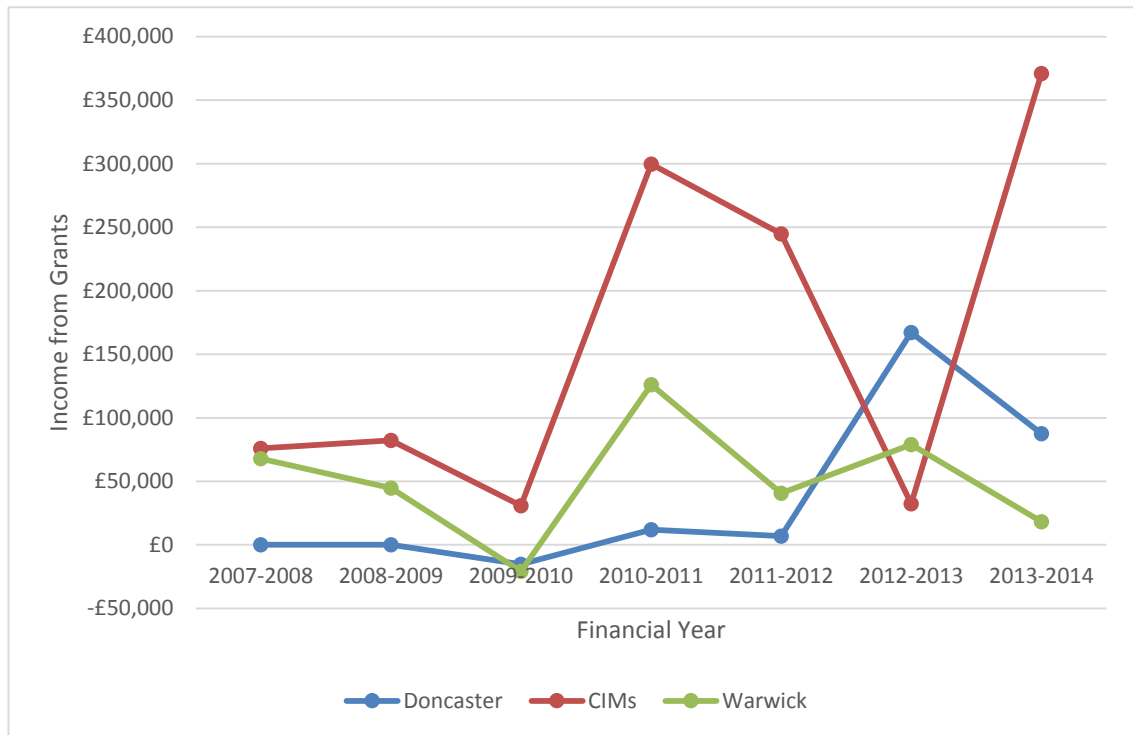
The financial data provided through the FoI request contained information on grants in four cases. Firstly, TWAM, shows declining income from grants (Figure 29). In three cases, income from grants varied widely year on year, as shown in Figure 30. While grants may be expected to vary as they are often associated with temporary projects, this variation suggests that reliance on grants will hinder service consistency.

**Figure 29: Income from Grants reported by TWAM**



*(Tyne & Wear Archives & Museums, 2011c, 2012d, 2013c, 2014b)*

**Figure 30: Income from Grants for Doncaster Council's Museums, Warwick District Council's Museum and CIMS**



*(Colchester Borough Council FOI Response, 2017; Doncaster Metropolitan Borough Council FOI Response, 2017; Warwick District Council FOI Response, 2017)*

### *Reliance on the Heritage Lottery Fund*

Three quarters of the included LAMs mentioned HLF. HLF funding was associated with a variety of projects, from hosting open days for teachers to find out about museum provision in Elmbridge, to building new museums in St Albans and Blackpool (Blackpool Council, 2015a; Interview 3; St Albans City and District Council, 2013). In Leicester, grants were reportedly utilised across the service (Interview 2). Where development was discussed, it was apparent that the HLF was considered the default source of funding:

I think the trustees aspire to do fairly major updating of the museum, so they'll be looking at a Heritage Lottery grant at some point [...] (Interview 1)

The committee considered an application to the Heritage Lottery Fund to undertake an interim project in the vacant building. (Worcestershire County Council, 2011a)

It is apparent that LAMs rely on HLF funds. An interviewee for the Cromwell Museum felt that the future of the museum depended heavily on the money available from HLF, noting that a lot of museums receive funds this way (Interview 1). HLF acknowledge that their responsibility has increased as other sources of funding have declined, and note that application numbers have increased, but are clear that they must not become and substitute for public funding (Heritage Lottery Fund, 2013a: 2–3, 2016a: 1, 2017: 6). Correspondingly, LAMs particularly rely on HLF for large scale redevelopments. For example, in Doncaster, large projects targeted the HLF whereas there had been numerous smaller-scale projects with smaller-scale funders (Doncaster Metropolitan Borough Council, 2015a).

The evidence suggests that museums see limited options other than the HLF for large projects and this reliance is echoed in the evidence for the impact of not receiving funds. While in St Albans it was suggested that without the HLF development the museum would be closed, this was the ultimate outcome for Elmbridge Museum: when the HLF bid for a new museum failed, the project was abandoned and the museum ultimately closed (Elmbridge Borough Council, 2008a; St Albans City and District Council, 2015b).

HLF grants require projects to include an access component. For example, funding for a new store for Saffron Walden Museum was dependent on the store being open to the public. When LA cuts led to a reduction in staffing, meaning that it was not possible to staff public access, the grant was withdrawn (Interview 7). In some cases it is unclear whether the museum service is shaping the project to fit HLF's requirements or whether the community access aspect is part of their original vision, such as with TWAM where HLF funds were sought for a project to move an object to be 'supported' by interpretation and a community history project (Tyne & Wear Archives & Museums, 2014a).

### *Match Funding*

Local authority support for fundraising appears essential, with many examples of match funding from LAs enabling grants from other organisations. In Blackpool the council pledged £240k for the development phase of the new museum project as part match funding for the £1.2m HLF grant (Blackpool Council, 2014a). Colchester Borough Council pledged £600k out of a reported total of £950k as match funding for the development of Colchester Castle (Colchester Borough Council, 2011a). In Birmingham, using £3m from the council was proposed as part match funding for an

HLF bid of £10m to enable the '20 year plan' development of the museum and art gallery (Birmingham City Council, 2007a).

Bagwell et al. report that LA match funding for grants was initially maintained, but that this is not expected to continue (Bagwell et al., 2015: 28). In Elmbridge, even before the official onset of austerity, the council wanted to keep their HLF bid under £1m so that they did not need to provide 25% of the project costs (Elmbridge Borough Council, 2007a). The lowering of the required match funding from HLF was welcomed (Colchester & Ipswich Museum Service, 2011a).

### *Governance*

Not all Trusts will give grants to LAs, meaning that LAMs are ineligible for a number of funds. This was one reason given for devolution in Birmingham, with the Museum Trust expected to find it easier to raise funds outside of the LA (Birmingham City Council, 2011b). The interviewee reported that the Trust had been successful in increasing fundraising, but that it was not independent enough from the LA for many grant-giving Trusts (Interview 14). That a Trust will be able to raise funds more effectively than a LAM was also an argument used in considering the future of the Cromwell Museum (Julie Cole Consultancy, 2014).

In other cases, LAMs utilised their partnership with a Trust. Fundraising for the new St Albans museum project was led by the St Albans Museums and Galleries Trust so that more grant-giving Trusts could be approached (St Albans City and District Council, 2015a). Saffron Walden Museum also found that the charitable ownership of the building and collections helped with fundraising (Interview 7).

Some services set up an adjunct Trust to enable fundraising. TWAM have had a fundraising Trust for since 2006 to solicit public donations. In 2010 it was decided the Trust should be changed to a company limited by guarantee and should have less local authority representation on the board of trustees to appear more independent (Tyne & Wear Archives & Museums, 2010d, 2010a, 2010c). Bath Heritage Services were in the process of establishing an educational Trust for fundraising to develop a property adjacent to the Baths as a World Heritage Centre and educational space (Bath & North East Somerset Council, 2010a, 2013a; Interview 8). Epping Forest Museum reported the intention to undertake a feasibility study about the potential for setting up a Trust or other body to secure external funding for the museum. This was funded by an ACE resilience funding grant (Epping Forest District Council, 2014d).

### **10.3.4 Use of Raised Funds**

A clear theme in the organisational documentation was that fundraising is necessary for a wide range of museum activities, with a focus on collections, exhibitions and redevelopment. Fundraising in Birmingham is used to supplement the acquisitions fund, including £1.3m of the £1.4m spent in the five years leading to 2008 (Birmingham Museums & Art Gallery, 2008a). Money from funding bodies was used for the display of items that were otherwise kept in storage and fundraising was also used to support the exhibitions programme (Birmingham City Council, 2011a; Birmingham Museums & Art Gallery, 2009b). In Blackpool, fundraising resulted in a grant of £4k for the restoration of a painting and another to fund a collections manager role for 3 years (Blackpool Council, 2007a, 2014e). In Worcestershire, funds were sought for conservation work and for collections research (Interview 10).

In Epping Forest, grant applications funded a member of staff (£13k), the purchase of IT equipment for collections digitisation (£2k), and a community exhibitions scheme (£1k) (Epping Forest District Council, 2009c, 2014e). The two smaller bids in particular show the lack of leeway in the museum's budget. Similarly, Saffron Walden Museum fundraised to purchase 8 chairs for the galleries, and again to cover travel expenses for two interns (Uttlesford District Council, 2014d). They considered bidding for funds for a temporary member of staff who, alongside enabling public access to the store and supervising interns and volunteers, would be able to 'concentrate on some basic documentation' (Interview 7).

#### *Resilience and Strategic Support*

Funding to support the development of financial resilience came primarily from ACE. A number of the cases received funds to investigate different business models and develop forward plans (e.g. Bath & North East Somerset Council, 2014a; Bath Heritage Services, 2014; Blackpool Council, 2010a; Epping Forest District Council, 2014d). However, this funding tended to be for planning rather than implementation, with Epping Forest District Museum noting further funding would be needed to pursue any proposals (Epping Forest District Council, 2014d).

Museums Worcestershire received two lots of resilience funding, first for staff training in fundraising and later for consultancy to develop a fundraising plan (Interview 10; Worcestershire County Council, 2013d). An interviewee reported that this support had been useful, but was very much a starting point as they found that writing successful grant applications took practice (Interview 10). Museums Worcestershire also received ACE support to develop individual and legacy donation schemes and to appoint

consultants to consider the future of the museum building after the library vacated the ground floor (Worcestershire County Council, 2013c, 2013d).

### *Endowments*

Museum consultant Friedman argues that:

A large endowment well invested certainly seems to be an answer.  
(Friedman, 2007: 6)

Speaking close to the launch of the National Lottery, Hewison suggested that the fund should be distributed as endowments to heritage organisations as this would mean that over time the organisations would need less revenue funding (1996: 8–9). On the surface this does seem like a desirable strategy as it would mean organisations would not have to plan their activities around the need to generate income, but Babbidge estimates that an endowment of around 25 times the required annual income is necessary to generate enough (2006: 3). In considering the future of the Cromwell Museum in Cambridgeshire, the consultant reported that a £1m endowment could generate £40k per annum, enough to sustain the museum in its current form (Julie Cole Consultancy, 2014). Friedman goes on to acknowledge that cultural organisations that are supported by endowments have built them up over their history (2007: 6–7). Further, Babbidge notes 'some progress' in developing endowments for cultural institutions through the Catalyst schemes from HLF and ACE, but that the initiative is 'on the wane' (2015: 24).

For Birmingham Museums Trust, endowments were not considered viable as a way of providing substantial support to the museums service due to the scale required, agreeing with Friedman that where this model works it is based on historical endowments (Interview 14). Nonetheless, the service is seeking to develop their endowment by encouraging bequests, one use being the creation of a collections purchase fund (Interview 14).

### *Capital Developments: Aims*

Major developments, largely using HLF funds, were either ongoing, in development, or being considered in Nottingham, CIMS, St Albans, Epping Forest, Bath, Uttlesford, Worcester, Waltham Forest, Blackpool, and Cambridgeshire. These varied between redevelopments, site moves and site expansions. In addition, Elmbridge had a failed HLF bid for a site move at the beginning of the timeframe under examination, Waltham Forest opened the redeveloped William Morris Gallery in 2012, and Leicester and TWAM report numerous projects over the years of this study.

Many of the capital developments sought by the sample LAMs were described as improving the museums through adding more space, better facilities and refreshed exhibitions and projects were aimed at encouraging and satisfying visitors due to their high expectations (e.g. Bath Heritage Services, 2015b, 2015c, Dartford Borough Council, 2007a, 2013a; Elmbridge Borough Council, 2007a; Epping Forest District Council, 2013; Leicester City Council, 2008; St Albans City and District Council, 2013). That development needed to be ongoing was described by CIMS, noting that the leisure market with which they competed was competitive and that customer expectations were high and changing (Colchester & Ipswich Museum Service, 2008a; Colchester Borough Council, 2013c).

That permanent exhibits were outdated was mentioned in Dartford, where the last major refurbishment had been in 1956, Cambridgeshire, Leicester and Uttlesford (Dartford Borough Council, 2013; Interview 1; Interview 7; Leicester City Council, 2013). Adding digital and interactive elements to exhibitions was commonly mentioned (e.g. Bath Heritage Services, 2015b; Colchester & Ipswich Museum Service, 2008a; Dartford Borough Council, 2007e; Elmbridge Borough Council, 2007a; Saffron Walden Museum, 2013), and Dartford Museum's bid to refresh the museum included putting the collections online (Dartford Borough Council, 2013a).

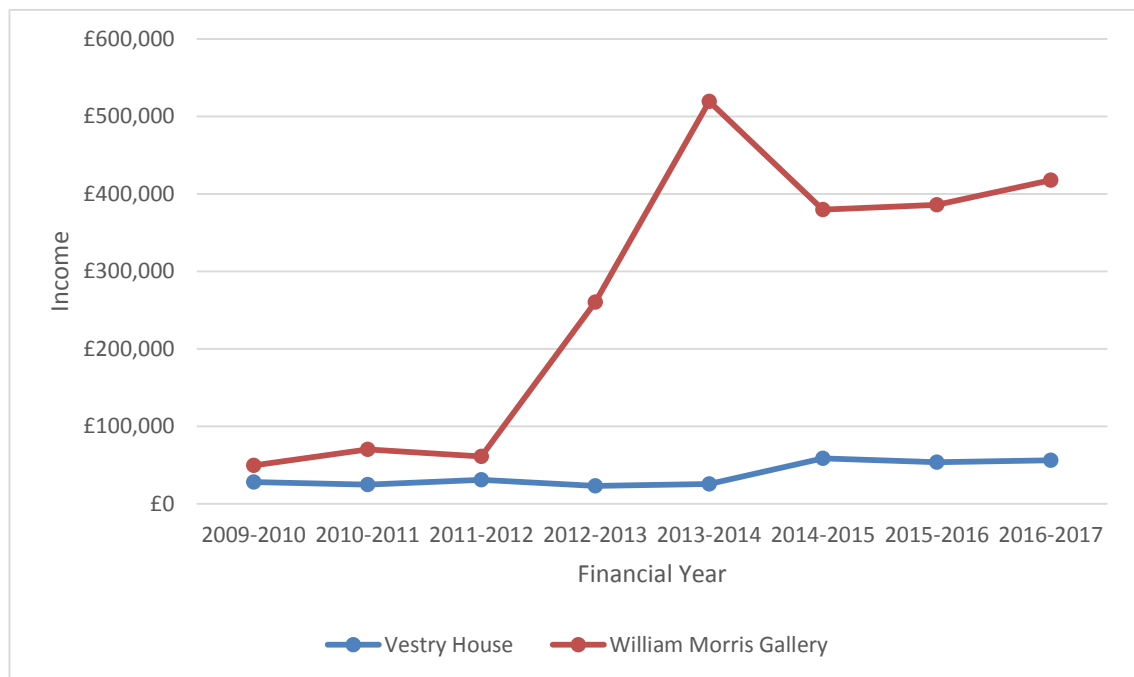
Making locally-themed permanent exhibits was common. In Birmingham galleries about local history were developed in response to reported public demand (Birmingham Museums & Art Gallery, 2009b). The new Blackpool and St Albans Museums were intended to be about local history, and local history exhibits are also described in Epping Forest, Leicester and Nottingham (Blackpool Council, 2014e; Epping Forest District Council, 2009e; Leicester City Council, 2012b; Nottingham City Council, 2013; St Albans City and District Council, 2013).

Some developments were specifically aimed at improving income generation. Belgrave Hall in Leicester was redeveloped from a museum interior to a historic house interior specifically so that it could be used for income generating events (Interview 2; Leicester City Council, 2012b). Leicester Museums received ACE funding for two further developments that were in part intended to increase opportunities for income generation through venue hire (Interview 2; Leicester City Council, 2012b, 2013). In other cases capital projects were considered essential in increasing income generation: the interviewee argued that extending Saffron Walden Museum was necessary to increase the space available for retail and room hire, therefore enabling income generation (Interview 7), and increasing visitor spending in Bath was reported to require investment (Bath Heritage Services, 2015c). The HLF report a 2016 survey in



which they found that 81% of respondents perceived increased financial sustainability following their HLF funded capital project (Heritage Lottery Fund, 2016b). Certainly, in the financial data provided for the William Morris Gallery in Waltham Forest there is a clear boost in earned income following the major redevelopment (Figure 31). However, it is unknown whether this increase will be sustained.

**Figure 31: Income for Museums in Waltham Forest**



*(Waltham Forest Council FOI Response, 2017)*

### *Capital Projects: Concerns*

There are a number of reasons why capital projects that extend or create new museums are concerning in terms of long term sustainability. HLF argues that there should be more high quality attractions for environmental sustainability: the more attractions there are, the less people will need to travel (Heritage Lottery Fund, 2010: 8). Nonetheless, more museums and bigger buildings mean higher costs, making the extension of Epping Forest Museum, desired extension of Saffron Walden Museum and new museum in Blackpool seem foolhardy in a time of fiscal austerity (Museums Association, 2012: 20). Many developments are couched using language such as ‘world class’ (e.g. Nottingham City Council, 2013; Waltham Forest Council, 2013b), giving an impression that prestige is sought, or as Janes argues ‘vanity architecture’ (Janes, 2013c: 356). The issue is that the building project is the focus rather than the ongoing cost of running the museum (Morris, 2007: 103).

The MA argues that creative use of current resources is preferable and suggest that redevelopment projects should create flexible displays that can be refreshed in sections rather than needing to redo an entire gallery (Museums Association, 2012: 17, 20). Plans to refurbish Birmingham Museum and Art Gallery were intended to maintain operating costs, with any increases expected to be covered by increased income (Birmingham City Council, 2007a). This leads to the second issue: that the income expected from a new development is unrealistic. The HLF estimate that visitor numbers rise around 50% after an HLF-funded project and that visitor satisfaction is generally high (Heritage Lottery Fund, 2010: 18). Building projects are used by museums to stir up interest in the museum from the media and therefore encourage donors and visitors (Morris, 2007: 101). However, Burton provides a cautionary tale detailing the failure of a museum where the business plan was based around unrealistic visitor numbers and income generation in order to satisfy funders (Burton, 2007: 114). It was reported, for example, that the new Blackpool Museum would be self-sustaining and therefore able to invest in community programmes, which seems unlikely given that Bath Heritage Services is the only self-sustaining local authority museum in England (Blackpool Council, 2014e).

Further, it is understood that any increased attendance associated with a renewed museum is temporary (Morris, 2007: 102). Larkin notes that while visitor numbers for individual English Heritage properties go up when they are refurbished, overall visitor numbers to English Heritage have been relatively stable for around 10 years, suggesting that these are established visitors choosing the refreshed property over another rather than new visitors (Larkin, 2014: 7). This example also suggests that regular refreshment of museums is necessary to maintain visitor numbers. Further, I saw in Section 8.2.2 how museums use reputation and the acquisition of external funding to demonstrate their value to LAs, meaning that prestigious projects are important in maintaining a positive perception of the LAM within the council.

### **10.3.5 Fundraising and Local Authority Museums**

#### *Complexity*

Fundraising is a complex endeavour that uses a large proportion of an organisation's resources (Foster, 2001: 149). This complexity was apparent in the application process for large projects, with an advisor appointed specifically for the Stage 1 bid for the redevelopment of Colchester Castle (Colchester & Ipswich Museum Service, 2008b). Similarly, ACE supported the development of a masterplan that would eventually inform a bid for ACE and HLF funding in Leicester and 'extensive work' was involved in the

scoping of an HLF bid for Nottingham Castle (Leicester City Council, 2012b; Nottingham City Council, 2013).

Fundraising is often undertaken in partnership with other organisations. Museums Worcestershire partnered with regional heritage organisations to apply to ACE's Cultural Destinations Fund and St Albans Museums partnered with the University of Hertfordshire (St Albans City and District Council, 2012d; Worcestershire County Council, 2013a). Partnerships were also mentioned by interviewees in Elmbridge and Leicester (Interview 2; Interview 3).

In Birmingham, the funds required to purchase the Staffordshire Hoard were reported to have come from 'a number of trusts, foundations and public donations' (Birmingham City Council, 2011a). Further, the acquisition, conservation and display of the Hoard were taken forward separately, with funds raised to acquire the Hoard first before further programme proposals were developed (Birmingham City Council, 2011a). Sourcing funding from multiple sources appeared to be the standard. In St Albans applications were submitted for individual aspects of the new museum project including funding for learning provision from Clore Duffield, funding for a volunteer co-ordinator from the Paul Hamlyn Foundation, and resilience funding from ACE to support development activities (St Albans City and District Council, 2015b). The match funding for the development of Colchester Castle came from a reported six sources, including two providing £5k of the over £900k total (Colchester Borough Council, 2011a). The development of a new museum in Blackpool involved targeting 'multiple trusts and foundations' as well as considering eligibility for European funding (Blackpool Council, 2014d). On a smaller scale, Saffron Walden Museum was able to purchase treasure finds with £61k raised from an individual fundraising campaign and grants from six funding bodies (Saffron Walden Museum, 2014b). Further, CIMS note that funds are often required to develop the project plan before efforts to secure funds for delivering the actual project can begin (Colchester & Ipswich Museum Service, 2012b).

This highlights the labour-intensive nature of fundraising, with many individual applications and schemes required for all projects. Further, as previously described, an interview in Worcestershire noted that fundraising increased the time frame of projects (Interview 10).

By securing project funding by stage, as with the Staffordshire Hoard in Birmingham, museums risk leaving projects unfinished. For example Elmbridge Museum secured funds to review of the collection but a second grant was required to continue the work

as items had been marked for disposal but the disposal process had not taken place (Interview 4).

A further level of complexity is that funders are ultimately stakeholders who want certain things for their investment. Gray argues that with HLF funding fixed-term programmes of activity, museums are able to target their bids as if they meet policy requirements, while in practice they enable pre-existing activities to continue. For the museum, then, this requires constant development of new justifications for funding (Gray, 2016: 3–4). In St Albans, the fundraising strategy includes:

Identify[ing] potential funders who share our ambitions. (St Albans City and District Council, 2013)

This suggests that they will need to be selective about the funding that they seek. Similarly, Doncaster set up a Heritage Board within the council to agree funding priorities and approve grant applications (Doncaster Metropolitan Borough Council, 2015a). CIMS also acknowledge that they view resilience as coming from securing diverse income sources include some that are ‘slightly to the side of our core function’ (Interview 9). This suggests that the service will have multiple influences on its direction. A museum, then, must either find ways to describe their direction in terms that funders like, reduce the number of funders they can approach by selecting only those that match their direction, or accept being pulled in different directions.

### *Limitations of Fundraising*

The interviewees for the Cromwell Museum were concerned that while fundraising was useful for capital projects, it would be very difficult to secure revenue funding in this way (Interview 1). This was also noted in Leicester:

[...] grants have to be additional. (Interview 2)

The interviewee for TWAM reported that their focus for fundraising had changed from capital to revenue due to the need for additional funds to support core activity, with fundraising expressed as enabling non-commercial work (Interview 13). The 2014-2015 draft budget included plans to use one-off grants to protect jobs (Tyne & Wear Archives & Museums, 2014c). However, the financial information for TWAM suggests that grant income is in decline (Figure 29)

The failure of a fundraising campaign can have a negative impact on LAMs. In Elmbridge interviewees reported a sense that the LA lost interest in the museum after the failed HLF bid and that this may have contributed to its closure (Interview 3; Interview 4). In Worcestershire, interviewees expressed a sense of frustration in the

time and effort required for funding bids that were not always successful (Interview 10). The failure of fundraising can therefore negatively impact staff morale at a time when they are already stretched.

Without LA funds for the Cromwell Museum, fundraising will be a major ongoing task involving both small-scale fundraising from the Friends organisation and work from the trustees to include a high profile annual event (Interview 1). Particularly due to the small scale of the operation, a temporary downturn in donations due to external factors, such as poor weather discouraging visitors, could risk the longevity of the organisation (Interview 6). Raising enough to last three years (at £35k per annum minimum) from the outset was considered be important in assuring the future of the museum so that a qualified curator could be attracted by job security (Interview 1).

### *Security from Investment*

Despite the complexity and limitations of fundraising, there was a general perception that winning funds made a museum more secure. This was specifically expressed by an interviewee for Museums Worcestershire (Interview 10). An example comes from Waltham Forest where the capital investment pledged by the council for the William Morris Gallery redevelopment was greater than the amount received from HLF (£1.675 from the council, compared to £1.532m from HLF), suggesting the investment was important to the LA (Waltham Forest Council, 2010). In St Albans, it was reported that securing Round 1 funding from HLF for the new museum project would act as an endorsement to other funding bodies (St Albans City and District Council, 2013). However, in some respects the security is because the terms of the grant require a guarantee that the investment will be worthwhile. In Birmingham it was reported that the grants awarded to sites in recent years meant that they contractually could not be closed as the funder could ask for the grant back (Birmingham City Council, 2011a).

## **10.4 Earned Income**

### **10.4.1 Perception**

Ashworth reports on a 2013 conference in which the question 'should we sell the past?' was raised. Delegates argued that the commercialisation of heritage conflicts with its stewardship (Ashworth, 2014: 5). In other words, generating earned income using heritage resources means using them in a way that it inappropriate. As concluded by Toepler and Dewees about the third sector:

The prevailing view is that commercialization is a strategy of last resort that may have unintended consequences for non-profit organisations. (Toepler and Dewees, 2005: 134)

In this section, I look at how commercialisation is perceived by the sampled cases to see whether this view dominates.

### *Commercialisation as a necessity*

The clearest case where the benefits of commercialisation are endorsed is Bath. The council views heritage as an economic asset due to it supporting the visitor economy that is prominent in the region:

The council's unique heritage assets, museums and collections are central to the prosperity of the district, together attracting around 1.2 million visitors annually. (Bath & North East Somerset Council, 2011a)

The interviewee for Bath Heritage Services echoed committee papers, explaining that while a balance between income generation, investment, and conservation is critical, the aggressive pursuit of visitor numbers and income enables the rest of the service (Bath & North East Somerset Council, 2011b; Interview 8):

Through its rolling 5-year business plan, Heritage Services maximises the commercial opportunities offered by the council's world-class heritage assets. Through planned re-investment of a proportion of its earned income, the service seeks to preserve and develop the Council's unique heritage assets, maintain and extend the audiences who enjoy them, and protect and enhance the income earned through them. (Bath & North East Somerset Council, 2011a)

Negative aspects of utilising heritage as an economic asset through tourism were only acknowledged in Bath, where traffic pressures were noted, as well as the likelihood that investment in contemporary buildings and therefore growth in businesses and employment may be inhibited (Bath & North East Somerset Council, 2010c). The interviewee perceived that residents of Bath were ambivalent towards tourism (Interview 8). Indeed, Ashworth describes Bath as an example of a town where the needs of the local population have been disregarded in favour of heritage tourism (Ashworth, 2014: 13).

Beyond Bath, larger services reported generating income as a necessity. The interviewee in Leicester considered commercial development important as it could provide ongoing revenue funding (Interview 2). Birmingham recognised it as a

requirement to achieve savings for the council, alongside cost-efficient service delivery (Birmingham City Council, 2011a). TWAM associated increasing the proportion of income that is self-generated with resilience and sustainability (Interview 13). A change of mind-set was reported, whereby entrepreneurial culture was being embedded throughout the organisation (Tyne & Wear Archives & Museums, 2012d). Commercial developments prior to the period under examination were described as having been a 'nice to have' to generate income for extras, whereas now the service was focused on income generation as a priority (Interview 13). Nonetheless, in relation to balancing the need to generate income with the museum mission the interviewee expressed:

I always put that it's like riding two horses, you really have to be comfortable with a level of discomfort. (Interview 13)

With regard to the distinction between stewardship and commercialisation, the interviewee was pragmatic about the difference between specific activities that were funded through public or fundraised sources and others:

It's fine if you've got funding to do something, you don't have to make money out of it, if it's a priority for us to do and it's funded, great, but if you say it's going to make money, it has to make money. (Interview 13)

As in Bath, balance was a common theme where earned income was discussed. For example, in Leicester, committee members agreed that despite the successful café and museum shop, the museum must be considered a service rather than a business (Leicester City Council, 2012a).

### *Reluctance*

Reluctance to increase charges to generate income came both from LAs and LAMs, and was associated with access and visitor numbers (e.g. Colchester & Ipswich Museum Service, 2008c, 2013a). For Leamington Spa Art Gallery and Museum minimising barriers to visiting through free entry and free events was a point of pride (Interview 5). An entry fee was considered unviable as it could reduce repeat visits, and commercial ventures were pursued only where they complemented the service's offer in terms of visitor experience, such as through selling souvenirs for exhibitions (Interview 5). Interestingly, the interviewee perceived that their lack of reliance on self-generated income made their financial status more stable (Interview 5). Overall, the apparent position of the service was that earned income is viewed as a 'nice to have' rather than an imperative, unlike at TWAM. While the interviewee expected that the

service would need to increase earned income, it was clear that planning was at an early stage and the organisation was hesitant about their options (Interview 5).

## **10.4.2 Sources of Earned Income**

### *Mixed Methods*

Utilising a range of methods to generate income was important, especially for the larger services, which discuss trying to increase income from retail, room hire, catering, increased fees and consultancy (e.g. Birmingham City Council, 2011f; Nottingham City Council, 2010: 10; Tyne & Wear Archives & Museums, 2011b). CIMS specifically aimed to pursue all commercial opportunities to reduce reliance on specific income streams and therefore mitigate the impact of a downturn in any specific area (Colchester & Ipswich Museum Service, 2008a; Colchester Borough Council, 2013c).

Museums Worcestershire's strategy to increase earned income included increased charges, improved marketing and increased consultancy. As well as reducing reliance on a single income stream, this seems necessary due to the anticipated income from each source being small in comparison to the service's overall expenditure. Increased charges in one area hoped to raise £2k per annum, and another £15k assuming full take-up of the service (Worcestershire County Council, 2013c). Similarly, for CIMS the increase in charges between 2008 and 2009 was anticipated to generate £11.4k in extra income, with the service spending over £1m in total (Colchester & Ipswich Museum Service, 2008c).

### *Entry Fees*

A number of the sampled services introduced or increased entry fees, including one venue in Welwyn Hatfield and Verulamium Museum in St Albans (St Albans City and District Council, 2014; Welwyn Hatfield Borough Council, 2011a). General admission to Birmingham Museum and Art Gallery remained free, but entry fees were agreed for other sites. Despite having reduced expenditure and increased income generation, the service stated that without entry fees the sites would have to close (Birmingham City Council, 2011b, 2011a). Entry fees were commonly justified as being comparable to or lower than competitors, such as in Birmingham and St Albans (Birmingham City Council, 2011a; St Albans City and District Council, 2014).

Given the economic situation, consumers have less disposable income meaning that admission charging is likely to have an impact on their decision to visit an attraction (Babbidge, 2009: 22). In cases where fees were introduced, visitor numbers did decline. However, in Birmingham the sites with entry fees saw increased overall



income (Birmingham City Council, 2011a). In Welwyn Hatfield, the service tried to mitigate the effect of the entry fee by increasing events, but while the drop in visitors was lower than expected, they remained lower than before (Welwyn Hatfield Borough Council, 2012a, 2012b). This shows that mitigating the effects of entry fees can have a cost: as events require resources to plan and run, detailed analysis could compare the costs and income. Similarly, in Bath, above-inflation admission price increases were a strategy for meeting income targets, but were pushing the 'limit of customer tolerance' in 2010 and visitor surveys showed that the Roman Baths were considered below average value-for-money (Bath Heritage Services, 2010). Instead of lowering charges, the service intended to invest in the visitor experience to make entry fees seem acceptable.

The consultant considered an entry fee as part of the plan for the future of the Cromwell Museum. They argued that admission charges would not reduce visitor numbers 'significantly' due to most being first time visitors with a specific interest in Cromwell. Further, they stated that even if visitor numbers decreased by 50%, income would be greater than the current rate of individual donations (Julie Cole Consultancy, 2014). The Friends of the Cromwell Museum argued that a 50% reduction in visitors was not acceptable, and to date the museum remains free (Friends of the Cromwell Museum, 2014).

Free entry was used in some cases to attract visitors (Museums Worcestershire, 2012; Tyne & Wear Archives & Museums, 2012d). Income was then generated by increasing visitor numbers and generating secondary spending (through retail and catering), making the overall income higher (e.g. Tyne & Wear Archives & Museums, 2012d; Worcestershire County Council, 2013b). Saffron Walden Museum Society subsidised free entry during half term and this was reported as resulting in a substantial increase in visitors compared to the previous year (Uttlesford District Council, 2010b).

In other cases, charges were used only for temporary exhibitions. These were introduced by TWAM and in Bath, and the exhibitions were found to attract visitors and increase shop sales (Bath Heritage Services, 2015c; Tyne & Wear Archives & Museums, 2014b, 2014c). While TWAM tried to ensure that pricing did not exclude visitors, the interviewee argued that charging for a special exhibition provided greater access than not having special exhibitions (Interview 13). To some extent, charging for temporary exhibitions is as far as some services are able to go: TWAM reported that their ACE funding is dependent on free entry to core displays (Tyne & Wear Archives & Museums, 2013a). Leicester Museums also noted that they must be careful about charges due to ACE requirements, whereas Birmingham Museums Trust reported

restrictions due to some items having been donated to the museums on condition of free entry (Birmingham City Council, 2011f; Leicester City Council, 2011b).

In Uttlesford an increase in admission fees from £1.50 to £3 per adult was due to be introduced (Interview 7). The interviewee expressed that when they first introduced an entry fee it had been received poorly by residents who felt that they had already paid for the service through council tax, however the interviewee thought that it was now more acceptable for LA services to charge (Interview 7). Indeed, community consultation in Waltham Forest resulted in comments that residents would not mind museum charges (Waltham Forest Council, 2014b). Nonetheless, the interviewee for Uttlesford expressed that they would try to keep the charge low to ensure access for 'families who struggle' (Interview 7). However, they also worried that they were under-selling the museum with the low admission charge, with activities often donation-only as well, and that this may affect the perceived quality of the museum (Interview 7).

In a number of places, price discrimination schemes were in place or were introduced to enable access for residents. For example, in Bath the Discovery Card scheme gives LA residents free access to some venues (Bath & North East Somerset Council, 2015a). Demand from tourists is thought to be comparatively price-inelastic (demand remains similar with changes in price) as their major expense is visiting the locale and therefore additional costs have less impact (Frey and Steiner, 2012: 228). The interviewee in Bath expressed that the rationale for the scheme was that access to the museum for local people was important (Interview 8), but organisational documentation describes the benefit of the scheme as additional visits from the friends and relatives of local people:

Free admission to Discovery Card holders, currently amounting to just over 1% of Roman Baths visitors, has been re-examined. The main benefit of this is in the additional visits by friends and relatives coming with local people. The income from such visits exceeds any potential income that could be achieved from charging local residents. (Bath & North East Somerset Council, 2015b)

Residents also do not pay admission charges in St Albans (St Albans City and District Council, 2014). While such a scheme was considered in Leicester, how it would operate had not been decided (Leicester City Council, 2011b). It is notable that such a scheme would incur costs to set up and operate, meaning that it is not axiomatically beneficial. Saffron Walden Museum and in Welwyn Hatfield Museums introduced season tickets to encourage repeat visitors but in Saffron Walden a wider range of

ticket types were avoided to keep the system simple for the volunteers staffing the reception (Interview 7; Welwyn Hatfield Borough Council, 2011c).

### *Trading Companies*

Trading companies were used by the larger services to generate return, as in Birmingham, where a trading company was established early in the devolution process (Birmingham Museums Trust, 2013a). The interviewee for TWAM reported being in the process of setting up a trading company to run the commercial elements of the service, including retail and catering. They hoped that this would allow the staff to focus on commercial income (Interview 13).

The consultant for the Cromwell Museum suggested that the new Trust establish a separate trading company to provide funds for the service. Their suggestion was a Cromwell-themed microbrewery, which might be considered inappropriate due to Oliver Cromwell's puritanical beliefs (Julie Cole Consultancy, 2014). The Trust has not pursued this route.

### *Catering and Retail*

While Cole argues that a shop can be part of the museum's educational offer, Mottner and Ford found that attempting to continue an educational strategy into the museum shop had a small, but statistically significant negative effect on income (Cole, 2008: 188; Mottner and Ford, 2005: 837). Babbidge warns that a heritage organisation deriving a much larger portion of its income from retail than admission unlikely to be meeting its mission (2006: 3). However, no cases in this study discussed the appropriateness of retail and catering facilities. Instead they were described as expected visitor facilities (e.g. Bath Heritage Services, 2015c). For example, CIMS report that catering provision was a benefit to visitors (Colchester & Ipswich Museum Service, 2008a).

Cole suggests that having a shop helps a museum attract visitors, noting that museums with a shop tended to have more visitors than those without (Cole, 2008: 188). Morris cautions that retail ventures often fail to cover their costs (Morris, 2007: 103). Visitor numbers are a factor in the viability of a shop or café, with the interviewee for Leicester arguing that it would not be worth having a café at a venue with fewer than 100,000 annual visitors (Interview 2). This means that this funding stream would not be available to smaller LAMs, such as Dartford from this study's sample. CIMS found it difficult to run catering facilities at a profit at one venue and decided to close it during the winter (Colchester & Ipswich Museum Service, 2008a). Worcestershire also

struggled to profitably run a café at one venue due to visitor numbers (Worcestershire County Council, 2011c). However, they decided to continue to subsidise it as it was thought to be needed as part of the future offer (Worcestershire County Council, 2013b).

Bath report that retail profitability was improved by strict control of costs (Bath & North East Somerset Council, 2010a). Similarly, the interviewee noted in Leicester that it had taken time for the café and shop to make money (Interview 2). Other commercial developments were described as 'a slow burner' (Interview 2), and Museums Worcestershire told committee members that new income streams would increase over time, suggesting that a quick change in reliance was not anticipated (Worcestershire County Council, 2012a). As a way to cope with immediate cuts, then, it does not seem that a service without a café or shop could quickly make money by adding one.

### *Service Fees*

Fees for services such as school visits and events were generally increased in line with wider council services. This was the case in Epping Forest and Welwyn Hatfield (Epping Forest District Council, 2010b, 2014c; Welwyn Hatfield Borough Council, 2011b). The consultant for the Cromwell Museum also suggested reviewing charges for schools and guided group visits to compare against other museums (Julie Cole Consultancy, 2014).

TWAM introduced charges for activities, including family learning events (Tyne & Wear Archives & Museums, 2014c). Some services were found unsuitable for a fee: CIMS considered charging for the administrative side of identification services, but found no other museum service that did so and that this would not generate a significant income (Colchester Borough Council, 2013b, 2013a). The theme was very much that fees should be increased cautiously, and therefore increased income will be limited.

### *Room Hire and Events*

In describing how historic buildings have adapted to generate more revenue, the majority of examples given in Heritage Counts are of party, conference or wedding venues (e.g English Heritage, 2012: 7). A number of cases in this study described trying to host more events. For example, Birmingham Museums report looking for effective ways of using museum spaces to generate additional income and Leicester Museums provide examples of refurbishments aimed at venue hire as previously described in Section 10.3.4 (Birmingham City Council, 2011c; Leicester City Council, 2012a).

While concern was raised in Leicester about the impact on visitors of hosting weddings, as they can result in the part-closure of venues, they reported that visitors enjoyed seeing that a wedding was going on (Leicester City Council, 2012a). However, Museums Worcestershire pushed back against suggestions that they increase work on events, arguing that they require a significant amount of staff time to plan and run (Worcestershire County Council, 2012b).

### *Consultancy*

Woodward reports that some museums are selling staff expertise to others to generate income, but also to make up for a shortfall in relevant skills in the sector (Woodward, 2012: 22–23). Indeed, a number of the sampled services report offering consultancy. For example, conservators at TWAM generated income for the service by selling their expertise to the private sector (Interview 13). CIMS reported increasing consultancy as desirable and hoped to set up a specific business unit within the service (Colchester & Ipswich Museum Service, 2008a).

Interviewees at Museums Worcestershire reported undertaking work for other services, therefore utilising staff expertise to generate income from outside the service. However, they noted that this reduced staff time on internal work and was therefore 'a necessary evil' (Interview 10). CIMS, however, found that providing commercial conservation services actually increased the staffing available for the care of the collection, as the bulk of the salary for one conservation post was covered by commercial income making it viable (Colchester & Ipswich Museum Service, 2008a).

A Museums Worcestershire interviewee noted that consultancy work was not new to the service, but that it had increased. They thought this to be in part due to increased commercial awareness in the service, but also to the increase in project-based work in the sector. The latter meant there were more opportunities for consultancy, as other museums found it easier to bring in resources on a temporary project basis (Interview 10).

### *Entrepreneurialism*

Stanziola argues that an organisation must base their financial management activities around their mission if they are to achieve both financial sustainability and their social/cultural objectives (Stanziola, 2011: 115). In some cases, however, an organisation may find a way to derive a profit from an unrelated or marginally related market and then use the profit to self-subsidize their primary mission (Sargeant et al., 2002: 3). Of concern is that business practices trend towards short-term gains,

whereas museums are founded on long-term missions (Griffin, 2008: 43–44). Janes encourages an aggressive pursuit of income generating activities by museums, stating that the main concern is that:

[...] the business ventures exist to serve the museum and its needs, not the other way round. (Janes, 2013a: 299)

The interviewee at CIMS argued that income should be increased by finding different ways to use the assets of the service even if some of the uses are not core museum functions, such as room hire (Interview 9). A described elsewhere, novel development for CIMS is the collaboration for a new museum studies degree with a nearby university. The interviewee thought that this would utilise staff expertise as an asset, while benefiting the service through encouraging best practice, requiring maintenance of up-to-date knowledge, and generating income through fees (Interview 9).

The interviewee for TWAM described a range of ways in which they were able to use their assets. For example, the retail operation was able to offer a wholesale service to other cultural organisations that did not have the infrastructure to do it themselves (Interview 13). They also hoped to generate income by touring self-designed exhibitions (Interview 13).

### **10.4.3 Challenges in Diversifying Income**

The 2014 MA survey noted that fewer museums report succeeding in increasing their income than report the aim to do so. In 2012, 69% and 62% of respondents aimed to increase earned income and individual giving respectively, whereas in 2013, 42% and 28% reported that they had done so (Evans, 2013: 9). They suggest that LAMs need more time and support to develop alternative funding streams and they cannot do this with the current rate of cuts (Museums Association, 2014: 8).

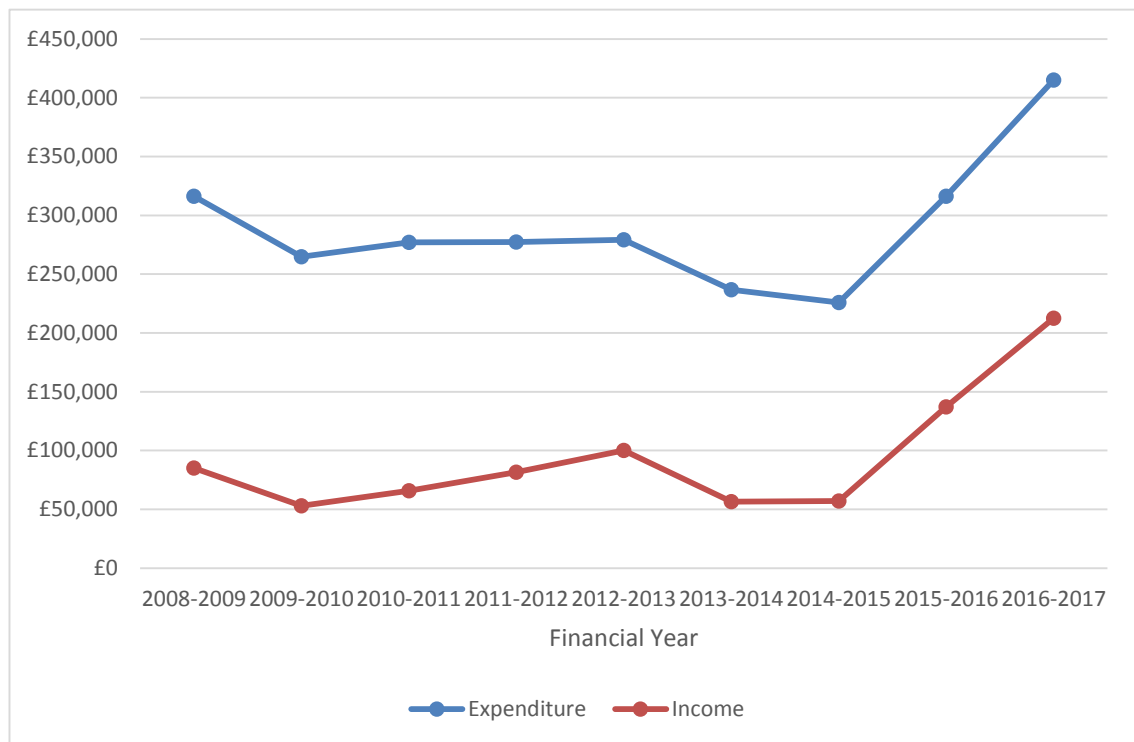
A difficulty faced by LAMs is that generating income requires expenditure to develop and maintain income streams. This is difficult to do when the authority needs to spend less overall. As described by the interviewee in Bath:

This authority, like all authorities, is contracting. It is having to spend less money, it's becoming smaller. If we are to deliver the income targets in our business plan actually we've got to grow. (Interview 8)

As previously discussed, Bath Heritage Services found that customer perception of their visit was falling and addressed this through investment in the visitor experience and staff training (Bath Heritage Services, 2010; Interview 8). They also wanted to invest in visitor facilities for the Victoria Art Gallery to attract more visitors and

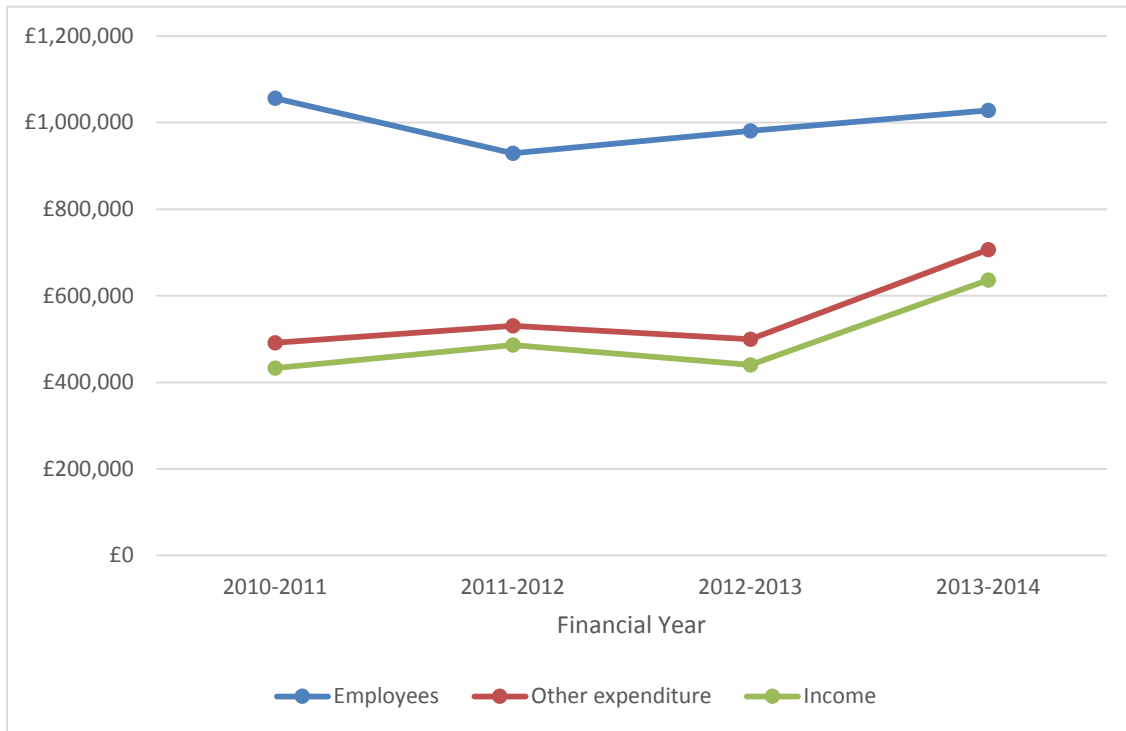
encourage them to spend more money (Bath Heritage Services, 2015c). They reported needing to improve the 'conversion rate of visitors to customers' - those using catering or retail facilities - and the average spend per head, and thought it necessary to expand the shop at the Roman Baths to facilitate this (Bath & North East Somerset Council, 2010a). One sees the relationship between income and expenditure clearly in the financial data provided by three of the case studies. In Blackpool, Worcestershire and Bath increases in income closely match increases in expenditure, as shown in Figures 32, 33 and 34.

**Figure 32: Income and Expenditure on the Grundy Art Gallery in Blackpool**



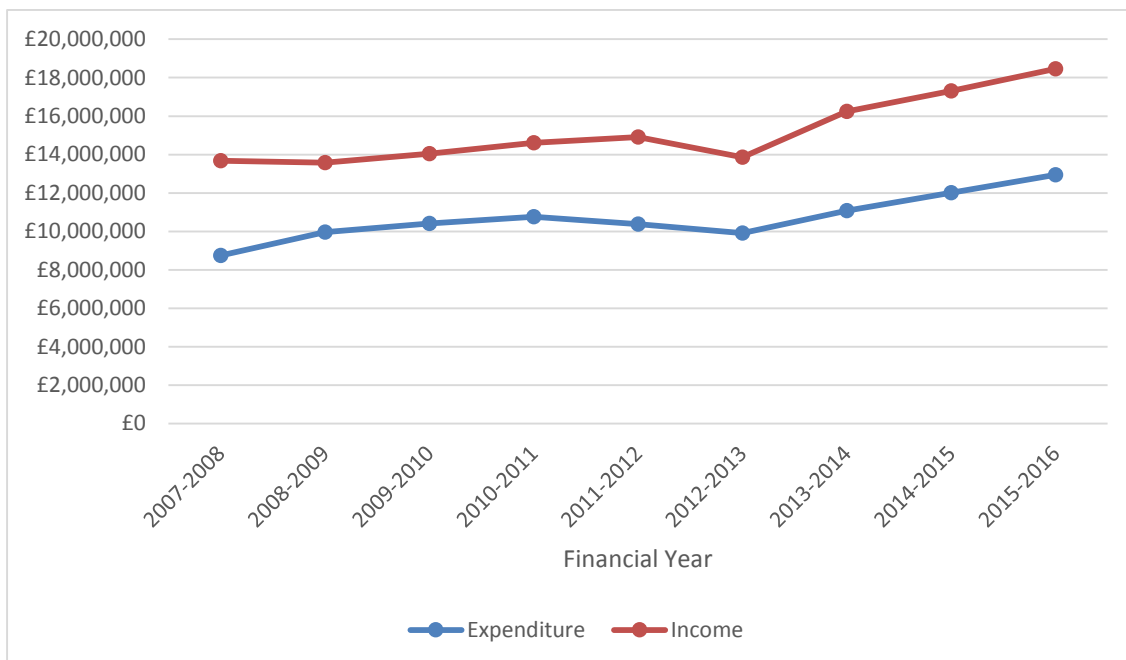
*(Blackpool Council FOI Response, 2017)*

**Figure 33: Income and Expenditure by Museums Worcestershire**



(Worcestershire County Council FOI Response, 2017)

**Figure 34: Income and Expenditure by Bath Heritage Services**



(Bath and North East Somerset Council FOI Response, 2017)

Visitor numbers increased in Birmingham since moving to Trust and this was associated with becoming more visitor friendly and securing investment in visitor



facilities (Interview 14). Leicester Museums reported regular investment in exhibits and visitor facilities associated with income generation (Leicester City Council, 2012b, 2013). Research in Worcestershire suggested that improving the offer through redevelopment would lead to increased income from admissions (Museums Worcestershire, 2012). CIMS also noted that generating income from visitors required regular investment and renewal (Colchester & Ipswich Museum Service, 2008a; Colchester Borough Council, 2013c). Overall, the LAMs report needing to stay up-to-date and regularly refresh facilities in order to attract visitors and generate income.

In many cases, capital projects were thought necessary to develop retail income. It is common for museums in the UK to be housed in historic buildings as this is assumed to be a good way to maintain the building. However, these buildings are often unsatisfactory in terms of size and configuration and can be costly to maintain (Burton, 2007: 118; Wales and Welsh Government, 2015: 23). The Uttlesford interviewees' perception was that the building was a limiting factor and that investment in an extension would enable more income generating activities (Interview 7). Certainly, Woodward notes that available space is a factor in the success of income generation through retail and events (Woodward, 2012: 23). Space was also perceived as a limiting factor for income generation in Bath, Worcestershire and CIMS (Bath Heritage Services, 2015c, 2015a; Colchester & Ipswich Museum Service, 2008a; Worcestershire County Council, 2012c, 2013b). The Cromwell Museum does not have running water, let alone space for commercial activities beyond a small sales area (Julie Cole Consultancy, 2014). Creativity would be necessary to increase earned income as common methods such as retail, catering and room hire are not viable in the space available.

Generating income through room hire and events also required investment in facilities, as previously described for Leicester in Section 10.3.4 (Interview 2; Leicester City Council, 2012b). TWAM hoped that investment in catering facilities would help to increase venue hire usage, but investment was not just needed for the physical spaces: marketing for venue hire at TWAM was reported as being 'aggressive' (Tyne & Wear Archives & Museums, 2011a; Tyne & Wear Museums, 2009). Further, it was noted that the central Newcastle venues had been successful in terms of venue hire, but those across the region less successful. This was attributed to location (Tyne & Wear Museums, 2009).

Funds were not just required for the physical shop space. Fundraising was required in St Albans to produce a DVD that could be sold to schools (St Albans City and District Council, 2015a). TWAM spent money developing a new shop website to help maximise

sales and appointed consultants to advise on income generation (Tyne & Wear Archives & Museums, 2011a, 2011a, 2013a). In Bath, the acquisition of new software enabled effective analysis of sales (Bath & North East Somerset Council, 2010a). For CIMS, purchasing new tills allowed improved sales analysis (Colchester Borough Council, 2014b).

CIMS thought that external factors contributed to difficulty meeting income targets (Colchester & Ipswich Museum Service, 2008a). This included commercial conservation services, which were principally associated with developer-funded excavations and were therefore affected by reduced development (Colchester & Ipswich Museum Service, 2008a). In Birmingham, visitor numbers (and therefore income) were considered under pressure for the main museum due to the demolition of the city library in the adjacent building (Interview 14). Factors such as good summer weather influencing activity decision making were also thought to decrease visitor numbers (Interview 14). External factors affecting tourism were also noted in Bath (Bath Heritage Services, 2010; Interview 8). The economic downturn was reported as putting a strain on some sources of earned income such as booked catered events. However, it was reported that proactive marketing and higher charges had meant that the income target had still been exceeded (Bath & North East Somerset Council, 2010a).

### *Impact of Museum Scale*

In Dartford, between May 2005 and March 2007, £806 was raised from sales; £310 through the donation box, £55 from talks given by museum staff, and £230 through providing museum publications to other organisations (Dartford Borough Council, 2007c). A small amount is generated piecemeal from a number of sources. The income generation activities of TWAM are also reported to be wide ranging (Interview 13). As a smaller service Dartford Museum needs less income than TWAM, but in comparing earned income as a proportion of expenditure then a significant difference is clear. In 2013-2014, TWAM reports expenditure of £10,421,000, trading income of £1,180,000 and grants and donations of £969,000 (Tyne & Wear Archives & Museums, 2014b). The trading income and grants and donations make up 21% of the total expenditure. In comparison, Dartford Museum had an outturn of £53,610 and income of £1,100, which appears to include earned income and donations (Dartford Borough Council FOI Response, 2017). This is just 2% of their expenditure.

Noble argues that smaller museums are able to focus on a specific mission, whereas a larger museum will need to have involvement in multiple areas to generate the

resources that they require (Noble, 2013: 234). However, the example given here suggests that smaller museums may need to target as many areas as possible but still may not have the capacity to generate income proportionately to larger services. Further, some of the activities undertaken by TWAM are possible only due to their size and status, such as the consultancy and retail wholesale service described earlier (Interview 13). As stated by the interviewee for Leicester and demonstrated by the number of subsidised retail facilities: some services cannot make a profit without sufficient visitor numbers making them challenging for small museums (Colchester & Ipswich Museum Service, 2008a; Interview 2; Worcestershire County Council, 2013d). Stylianou-Lambert et al. argue that small rural museums in isolation are 'doomed to conventional, undistinguished and thus unsustainable futures' due to not having enough of a distinct product to competitively attract tourists. They urge such museums to work together in partnership to attract visitors (Stylianou-Lambert et al., 2014: 582). Whether the Cromwell Museum Trust's attempt to forge partnerships with a civil war theme will prove successful will be a test of this proposal. A more detailed study of this would be necessary to draw conclusions.

## **10.5 Discussion**

LAMs are advised to diversify their income as generating income from a number of sources is associated with lower income volatility over time. It is notable that this is not a new direction, with pressure on museums to generate their own income evident for a number of decades (Chapter Two). The methods suggested to help the heritage sector become more resilient in the wake of reduced government funding are not new ideas with achieving value for money, increasing income generation and increasing private finance having been demanded from museums since the 1980s (Selwood, 2001a: 22). As discussed in Section 9.4, commentators speculate that the overall environment for cultural services has been fairly benign and a sense of entitlement for public funding remains, meaning there is a lack of incentive for diversification. Potentially, the sector has not felt the need to take these demands seriously before. In this study I found cases where earned income was considered a 'nice to have' addition prior to the economic crisis, but has become a priority, and others where the continuation thus far of the benign environment meant that the mind-set in the museums service remained in that pre-crisis state. The remaining question, then, is whether income diversification can work for LAMs. The sampled cases conclusively believed that they could not survive without LA funding, but the majority were actively seeking alternative sources of income generation.

## *Fundraising*

Cases did not have high hopes for corporate fundraising, with even the larger services perceiving that they lack the network and skills to utilise this method extensively, and the sample providing examples of where raised funds fell short of the plan. However, this study was unable to go into detail about practice and outcomes specific to corporate fundraising and further work in this area would be worthwhile before it is discounted as insignificant to the future of LAMs. Fundraising from individuals was more commonly discussed, with specific initiatives and donation drives evidence of a more proactive approach to securing donations from visitors. Further, the majority of services had Friends organisations and found these helpful for a modest level of financial and volunteer support. Compared to these sources of raised funds, cases were far more reliant on grant giving organisations. In particular, the HLF was clearly seen as the default source of funding for capital projects of many different types.

Of concern is whether match funding can be sustained. There are numerous examples of match funding being provided by LAs, but also an example of an LA downscaling plans to avoid this requirement and an overall expectation that match funding will become harder to secure. Interestingly, as discussed in Section 8.2.3, there is evidence that the LA remains the safety net for LAMS, with two cases where LAs made up for a shortfall in contributions towards capital projects.

A key theme in the fundraising activities of the sampled museums was that fundraising was required for most activities beyond the very basics of daily opening. There was a focus on collections, exhibitions and redevelopments, with the former in particular adding weight to the concern for the future of collections as it suggests that LAMs cannot afford to look after them without regular injections of external funding. Of further concern is that smaller services fundraised for small purchases, showing how little leeway they have in their budget.

## *Earned Income*

Larger services embraced commercialisation more and appeared to have more opportunities to earn income. Facilities such as cafes were out of reach of small museums due to visitor numbers, and larger services were able to utilise their wider range of skills and resources to commercialise their activities. However, smaller services also showed more reluctance and hesitation with regard to commercial initiatives, leaving it unclear what the potential would be if they tried. Reported reluctance was usually related to access concerns, and committee papers showed councillors joining in the calls to ensure fees were affordable.

There is an overall discomfort with entry fees. Cases retained focus on their accessibility and felt that entry fees were in opposition to that principle. There are the beginnings of thawing, however: fees are justified as being lower or comparable to competitors. One case wondered whether they gave a poor impression of their quality and value by keeping the fee low while another posited that entry fees for temporary exhibitions were still more accessible than traveling to a national museum. There is clear internal conflict between access and financial need, with the latter justified and rationalised to make it appear acceptable.

In practice, entry fees did reduce visitor numbers, requiring additional effort in terms of marketing and programmes to compensate. There have been many studies of the impact of entry fees and it is not the place of this study to debate their significance (e.g. Bailey et al., 1998), but it is clear that this situation provides an opportunity for case studies to add to the evidence in this area.

While there were examples of innovative income generation methods - from CIMS's collaborative museum practice degree, to TWAM's purchasing scheme - most cases pursued fairly common income generation activities. Most cases believed they needed public support due to the limitations of income generation methods:

There are only so many slices of carrot cake you can sell in your tea room. (Interview 14)

Certainly, it is generally agreed that revenue funding is the hardest to find from non-governmental sources (Holden, 2007: 10). It would be worthwhile following up on TWAM's efforts to focus fundraising on revenue rather than capital.

### *Concerns*

While this might be attributed to resistance, lack to imagination and initiative, there are clear drawbacks and obstacles to all sources of income available to LAMs. Firstly, a clear finding is that it is necessary to spend to earn, with capital a necessity for organisations in the cultural sector (Throsby, 2010: 143). As stated in Leicester:

If we've got great projects we get more people coming. (Interview 2)

So, in order to attract visitors who will spend in the café and shop, pay entry fees for temporary exhibitions, and allow the service to report satisfactory visitor number performance to the LA, the service must have a continual programme of activities, exhibitions and refurbishments. Even Friends organisations, comprising those one would expect to have dedication to the museum, take effort to maintain, with their support not to be taken for granted but rather actively managed.

There was an element of risk in trying new things to attract income: Museums Worcestershire's decision to open on Sundays even though it is weakest day in order to develop the weekend breaks market is an example of spending without immediate payback. Janes notes that museums tend not to have money available to experiment with alternative sources of income (Janes, 2013a: 299).

Further, other sources of income offered piecemeal support. Endowments, for example, have been discussed for their potential in relation to their importance in the USA, while in the UK endowments provide helpful additions but cannot support an entire service. Both fundraising and earned income require contributions from multiple sources. In particular with fundraising this meant that projects were approached on a step by step basis. With every additional source of income added, the resources required to manage the process and stakeholders increases. While the larger services may have the capacity to handle this, smaller services such as Saffron Walden Museum appeared to be struggling.

Of particular concern is that some services felt they needed to expand their space in order to improve their facilities. While doing so may create a more attractive museum it also increases running costs. The new Blackpool museum was expected to be self-sustaining, which given the national picture of museums seems unlikely.

Museums appear to be in a catch-22 situation in this regard: firstly I saw in Section 8.2.2 how LAMs report external funding to LAs in terms of prestige, and that there is evidence that LAs do value LAMs for the external funding that they bring. There is also evidence that redevelopments result in increased visitor numbers, but only on a temporary basis. Museums undertook capital developments because they felt like they had no choice in order to keep up with visitor expectations, both in terms of updating exhibits and improving facilities. The latter was associated with income generation through catering, retail and venue hire, but not always explicitly so. As such, LAMs appear to be in a cycle whereby they must favour prestige over practicality, necessarily securing funding and embarking on high profile projects in order to keep momentum in terms of LA and visitor support. Indeed, there are negative consequences in the failure of funding bids.

The critical importance of capital projects and active programmes is clear, and the current picture regarding sources of income shows that the sector remains heavily reliant on HLF, ACE and other Trusts. The fate of the sector is therefore in the tenuous hands of these organisations that may have over-extended themselves and may be subject to further cuts of their own. However, I argue that to some extent the somewhat

benign climate in which LAMs operate has been sustained by these Trusts, meaning that the majority of LAMs have not yet had the incentive to make a particular effort to diversify.

# 11 Discussion and Conclusions

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In this chapter I return to the original research questions of this project. While the previous chapters have presented information that begins to answer them, and the point here is not to repeat what has already been said, it is important to collate and summarise the findings. In doing so, I will identify key themes and generate conclusions.

The research questions were:

4. How has government austerity affected local authority museums in England? How does it continue to affect them?
5. How have these museums reacted, or plan on reacting, to these effects? What strategies have they adopted?
6. How effective have these strategies proved to be so far?

I will firstly summarise the findings relating to the first research question. Questions 2 and 3 will then be covered together to avoid repetition and ensure coherence. I then discuss the implication of the findings. Finally, I will conclude by proposing directions for future research: while efforts were made to make this project comprehensive, it could not go into adequate detail on all aspects of LAMs and austerity and there are a number of possibilities for further work.

## 11.1 How has government austerity affected local authority museums in England? How does it continue to affect them?

### 11.1.1 *Overview*

Entering the period of fiscal austerity, LAs had inherited the cost of their museums, rather than having planned their expenditure around their resources. Northern regions were more reliant on LAMs for museum provision than the South (Section 6.1.2). As of March 2015, 71 LAMs had been lost, including 20 closing, 57 being devolved to Trust and 8 new LAMs being established (Section 6.3.1).

### 11.1.2 *Finances*

#### *Local Authority Expenditure*

Looking nationally, LAMS have weathered greater cuts on average than other LA services. However, the picture varies widely, and museums and heritage services have



more commonly seen an increase in expenditure than other services (Section 6.2.1). This suggests that the methods employed to weather cuts have been diverse, and there are cases where LAMs have been boosted, perhaps strategically as part of a plan for economic development.

While there is evidence that public support can grant a reprieve for LAMS, it postpones cuts rather than stops them (Section 8.2.4). However, there is some evidence of LAs continuing to provide a safety net for LAMs, covering overspend and finding match funding for capital projects (Section 8.2.3).

LAMs did not believe they could survive in their current form without LA funding (Interview 6; Interview 13; Interview 14; Rutherford, 2009). LA support was associated with the long-term survival of heritage and the social justice mission of museums.

### *Funding from Other Sources*

Further budgetary pressures included:

- The loss of the MLA's Renaissance funding has jeopardised outreach and education services, and necessitated a scramble to secure alternative funds to continue programmes (e.g. Worcestershire County Council, 2012c). However, recipients found that the MLA had brought bureaucracy and lacked strategy and while ACE is not the ideal guardian of the sector they had been individually supportive so far (Interview 1; Interview 2; Interview 6; Interview 9; Interview 13; Interview 14).
- Declining school budgets, changing curriculum and the move to academies in some places meant that schools were difficult for LAMs to keep up with (e.g. Interview 11)
- The speed of cuts and uncertainty surrounding them has made planning more difficult for LAMs.
- Cuts in other LA departments such as HR and marketing have pushed more responsibilities onto LAMs.

### **11.1.3 Governance**

Shire Counties have the most complex museums services, often having three or more museums and managing them in partnership with other organisations. They have also cut the most and made the most changes to the structure of their LAMs (Section 6.3). Larger services made more changes, perhaps because they could streamline their service without losing it entirely, whereas smaller services had less scope for

incremental change. In the sample, two museums were moved to Trust, one joint service was formed, and one museum closed but the museum service retained.

The two cases where the LAMs were devolved to Trust were a small part of their LA and both reported difficulty in making the necessary connections within it (Section 9.1.1). While Birmingham Museums Trust is a very large museums service, Birmingham City Council is a very large LA and the interviewee reported particular challenges in relation to LA bureaucracy and mutual understanding (Interview 14).

The majority of museums have not changed in terms of governance or management. The data gives some insight into why (Section 9.1). Firstly, Trust status was considered in several cases but rejected by most as not providing the required short-term savings. Medium- to long-term savings and operational freedom were not persuasive. Internal mergers, such as museums with libraries, were considered and rejected in a number of cases as well, in this case due to the speed of austerity impeding co-operation. In both examples, the immediacy of need to make savings hindered potential solutions.

#### **11.1.4      *Knock-on Effects***

##### *Staffing*

Direct effects of cuts on staffing were described in Section 7.3.2. There was a trend for reduced staffing and restructure, with particular losses in curators, conservators and learning, leading to concern about the knowledge functions of the services (e.g Interview 13). Remaining staff took on additional responsibilities and worked hard to maintain service standards. These additional demands provide opportunities for staff to develop but reduce the already poor employment terms of the sector, increasing the gap between required skills and experience and pay, security and benefits.

Where new roles were created there was a focus on income generation, with new roles in fundraising, commercial development and marketing. There were cases of increased volunteer use, but staff perceived their management burdensome. The ACE study of LAM resilience found that LAMs tend to use fewer volunteers than other museums, and this perception may provide part of the explanation why (TBR et al., 2015: 11).

##### *Opening Hours*

As described in Section 7.3.1, there were cases where reduced staffing and other budget pressures meant reduced opening hours, but these were often approached strategically. There was not an overall trend of reduced opening hours, and consequent

access. Similarly, there was not an overall trend of reduced visitor numbers with different venues within a service having mixed fortunes.

### *Collections*

Discussed in Section 7.3.3, pressures on collections came from two areas. Firstly, some cases report difficulty in finding time for collections work and reduced or cut their enquiry and research services. Secondly, three of the sampled museums highlighted that they had compromised with the council on recent store moves, having less space than needed and lacking ideal facilities (Interview 4; Interview 7; Interview 10). Further, there was concern about the future of stores, in particular the likelihood that space would be lost (Interview 10).

Overall, discussion of collections in terms of their central role in museums was lacking. Stewardship was rarely mentioned in interviews and organisational documentation, particularly in the latter, with the former focusing on frustration about LAs understanding the need to maintain collections standards.

## **11.2 How have these museums reacted, or plan on reacting, to these effects? What strategies have they adopted? How effective have these strategies proved to be so far?**

### **11.2.1 Overall Reaction**

#### *Action*

A striking difference in the cases where interviews were conducted was between those that felt part of the LA and those that felt 'other' (Chapter 8). Those that gave the impression of feeling like part of the LA did not receive lower cuts but reported understanding of the need to make cuts and showed an active response to them. These LAMs sometimes had a dedicated museum committee to provide access to decision makers, and tended to report their aims in line with the wider aims of the LA. Correspondingly, The ACE commissioned study of LAM resilience recommended that LAMs align their priorities with the LA, and maintain visibility to other departments (TBR et al., 2015: 16–18). Though many of initiatives to deal with austerity were being trialled and therefore were not yet proven to be effective, services were perceived as becoming more efficient and effective, and therefore able to make better use of funds whenever they became available (e.g. Interview 12).

### *Passivity*

In contrast, there were cases where the LAM felt disassociated with the wider LA and these tended to show a slow response to austerity. These cases tended to be geographically, hierarchically or culturally distant from the LA and decision makers and lacked connection to the LAs aims and objectives. They tended to feel that their relationship with the LA was antagonistic, and that the needs and standards of museums were misunderstood. These cases showed inaction in dealing with austerity.

As described in Section 9.2.5, these cases understood that they should be developing alternative funding streams but were in early stages of doing so. This is both due to staff lacking the skills and experience to drive initiatives forward, and the connections within the LA to get decisions made.

An anomaly is Leamington Spa Art Gallery and Museum where passivity appeared to be associated with the belief that LA finances were cyclical and that the situation would be temporary. The museum had not yet suffered significant cuts and therefore lacked incentive to diversify income, but also demonstrated ideological resistance to doing so. The former has been specifically argued as a reason for slow change in the sector.

## **11.2.2 Governance and Management**

### *Joint Services*

The three joint services in the sample reported benefiting from freedom in comparison to individual services and from easier decision making due to their close relationship to a dedicated committee with a reasonable level of power (Section 9.1.2). Having more than one LA involved meant that they held each other accountable to some extent, guaranteeing continuation of support. Joint services were reported as enabling efficiency savings and as they were larger were able to develop their national reputation and have more access to national funds. However, communication was challenging for joint services, in particular due to the increase in stakeholders.

### *Opportunistic Working*

CIMS in particular described their strategy as being open to opportunities from all stakeholders on local, regional and national scales (Section 9.2.2). CIMS criticised Renaissance funding for poor strategic direction yet appeared to be trying to maintain the same approach. In some respects this is a necessity to secure funding, but it may derail the LAM's mission. Further LAMs lack the organisational agility to pursue such an opportunistic strategy and they risk creating a service without a coherent offer.

Alternatively, LAMs may be able to shape bids as if they meet the stakeholder's requirements, while in practice they enable pre-existing activities to continue.

### *Collaboration*

Collaboration between museums delivered exhibitions and events, raising the profile and visitor numbers of museums such as the Grundy Art Gallery in Blackpool. Cases report overall co-operation between LAMs as strong, with numerous formal and informal networks aimed at sharing experience and providing support (Section 9.2.3). This is despite a trend of commentary that museums should cooperate more so that the sector can 'help itself'.

Partnership working with other arts and leisure organisations was evident as a common strategy, with cooperative marketing recommended. However, organisational documentation and interviews show this as recommended but not necessarily implemented. A reason appears to be that LAMs often do not have the skills and capacity to take forward such initiatives. Correspondingly, the ACE commissioned report of LAM resilience recommended that ACE support museums in connecting with the wider creative and tourism sector (TBR et al., 2015).

## **11.2.3 Saving**

### *Efficiency Savings*

In dealing with cuts, LAMs have often reduced expenditure. The larger services reported making efficiency savings across all areas, from staffing to procurement, but smaller services appeared to have either less potential or less ability to make savings (Section 9.2.1).

Beyond scale, a reason that larger services have had more apparent success is that making savings has required expenditure, which smaller services would find harder to accommodate in their budgets. For example, a number of services hired consultancies to conduct a review, and others undertook capital projects to enable energy savings.

A number of services reported that they were as efficient as they could be and that further cuts could not be absorbed by efficiency savings. Birmingham Museums Trust, for example stated that staffing was at the minimum and retrenchment would be necessary to handle further cuts (Birmingham City Council, 2011b, 2011f). Whether such reports are the reality or intended to make the LA think twice is unclear.

### *Localism*

Smaller services appear to be strategically responding to cuts by retreating to a more local focus (Section 7.3.3). This reduces both the scope and costs of the museum, but results in a decline in wider material open to local people and therefore access to cultural resources.

Larger services also report developments focusing specifically on local history. The difference in these cases is that these local resources are available in addition to wider materials. Touring exhibitions may therefore be an important resource for smaller local museums in ensuring that wider materials are part of the offer for local audiences.

### **11.2.4      *Generating Income***

Income generation clearly required mixed methods and therefore a significant commitment of resources that is likely to be a particular challenge for museums with few staff (Section 10.4.2). This approach is essential as each funding stream provides a small proportion of what is needed, but also is pragmatic in avoiding suffering following downturn in a specific area.

The picture in regard to success in increasing income is mixed. In the statistical analysis of national trends, I found that around 50% of LAs have seen a drop in income from museums and heritage, whereas 40% have seen an increase (Section 6.2.6).

#### *The Need for Fundraising*

Fundraising was necessary for a wide variety of museum functions (Section 10.3.4). It enabled acquisitions, conservation and restoration, exhibitions, access projects, and digitisation. Smaller museums use fundraising for minor purchases, such as chairs at Saffron Walden Museum, showing the essential nature of fundraising in enabling everything beyond the bare bones of a museum (Uttlesford District Council, 2014d). Further, while fundraising usually has to be additional and therefore does not cover revenue expenditure, TWAM are trying to fundraise for unrestricted revenue funds. It would be interesting to follow this initiative.

#### *Corporate Fundraising*

Cases did not provide many examples of corporate fundraising, perceiving that neither they nor the LA had the networks to develop this area, and that corporations were constrained in how much they could give (Section 10.3.1). Further, a couple of cases reported that private sector donations had fallen short of their plans (Nottingham City Council, 2010; Waltham Forest Council, 2013b).

### *Individual Fundraising*

In contrast, there were examples of initiatives to increase individual donations that had apparent success (e.g. Tyne & Wear Archives & Museums, 2013a). Only one service showed resistance to individual fundraising, perceiving that beyond donation boxes 'the hard sell' was a barrier to access (Interview 5).

### *Grants*

The main source of fundraising income was in the form of grants, though LAMs' attachment to local government makes them ineligible for some funds (Section 10.3.3). Birmingham Museums Trust found that it was easier to fundraise from Trusts than it had been as part of the LA, but that they were still not considered independent enough to access some funds.

Of concern is that many grants require match funding, to which LAs often contribute. While this appears to have been forthcoming in many cases, perhaps as LAs appear keen on major developments potentially due to the associated prestige, it was becoming increasingly difficult to secure due to declining budgets.

Cases where information on grants income was found show year on year fluctuation. This is to be expected as they will usually fund temporary projects, but is a concern as reliance on fundraising increases.

### *Reliance on HLF*

A concern is the apparent reliance on HLF (Section 10.3.3). Grants from HLF were found to be considered the default source of funds for refurbishments and major developments. Though smaller projects found funds from other sources, even if there are other options for large projects it appears that LAMs are not aware of them or believe HLF to be the best option. With this reliance, what will happen if lottery sales drop and HLF funds fall?

### *Commercial Income*

As discussed in Section 10.4, larger services appeared to embrace commercial income generation more than smaller services. A change in mind-set was reported, whereby self-generated income had previously been a nice addition but now was a necessity for resilience (e.g. Interview 2; Interview 13). They have more options for generating income, having found ways to commercialise their assets beyond retail, catering and room hire. They have benefited from an increase in project based working in the wider sector, with smaller museums winning project funds that they required support to

deliver. There were examples of more innovative developments on a smaller scale but the majority, even in large services, were conventional in approach, consisting of shops, cafes, room hire and fees for activities.

Smaller services have significant challenges in generating commercial income. Cafés, for example, are not profitable without high visitor numbers. However, they are considered necessary facilities for customers and were sometimes subsidised.

### *Entry Fees*

There was clear distaste for charging entry fees, with the concept of access remaining a psychological barrier (Section 10.4.2). They were added or increased in a number of cases, but were always justified as being comparable or less than competitors.

Instances of introducing an entry fee did result in a reduction in visitor numbers. This was often addressed through marketing and by running more events, both of which require additional expenditure. A comparison of additional costs, additional visitors and additional income would be of interest to assess this strategy.

## **11.2.5 Spending**

### *Temporary Exhibitions*

Events and temporary exhibitions appeared to increase in importance for LAMs, with services such as the Grundy Art Gallery in Blackpool and Museums Worcestershire actively developing their offer in this area (Section 9.3.1). They were highly promoted in organisational documentation and were perceived as demonstrating the economic potential of museums as attractions. Events and exhibitions maintained momentum for LAMs, attracting both new and repeat visitors, and provided opportunities for publicity which may be valued by LAs as well as increasing the public profile of the museum. Further, they can be produced using external funding.

There was some confusion around the aims of events, however, with stated goals of increasing access and diversifying audiences often translating in practice to increasing visitor numbers. This may be associated with the persistent difficulty in demonstrating performance beyond visitor numbers.

Some services found that staff time to develop exhibitions was limited and reduced the number that they produced each year. Achieving balance between maintaining professional standards and maintaining LA and public support was a challenge.



### *Access to Collections*

Collections work was addressed using external funds in combination with access initiatives. Access, including online access, was the commonly quoted rationale for working on documentation and in interviews was associated with increasing their visibility for the LA and therefore demonstrating their active value (Section 9.3.3).

Collection access projects appear beneficial in a number of ways: they are doable with external funding; enable collections work that would otherwise be difficult to prioritise; increase knowledge of collections where loss of curatorial knowledge is a sectoral concern; and increase the value and utility that the LA derives from stored collections, thus reducing the risk that they will be perceived as expendable. However, tangible outcomes for such projects were difficult to discern beyond improved documentation.

### *Spending to Earn*

Of particular interest is that increased income is often associated with increased expenditure. Increased income was associated with increased expenditure in the statistical analysis (Section 6.2.6) and as I showed in Section 10.4.3, increased income closely followed increased expenditure in Worcestershire, Bath and Blackpool. This indicates that a major challenge in addressing cuts is that developing income streams requires expenditure.

### *Capital Projects*

There were major developments either ongoing, being planned or being considered in over 50% of cases (Section 10.3.4). These included site moves and site expansions. It was perceived that more space and better customer facilities are needed in order to attract and satisfy visitors and encourage them to spend.

More space translates into higher running costs, and a common criticism of capital projects is that the projected earnings are unrealistic and increased visitor numbers temporary. Bringing in external income for prestigious capital projects does not necessarily avoid LA budget cuts, and may in fact trigger them as the LAM is better able to generate its own income. Major capital developments may therefore be foolhardy in the current financial climate and ongoing smaller development may be more sensible.

However, I argue that a significant outcome of major developments is profile and prestige (Section 10.5). Immediate increase in income and prestige is clearly evident in some case studies, and I demonstrated how reputation, importance and profile are common boasts of LAMs to LAs. I question whether smaller scale developments can

cumulatively have the same effect. Can a rolling programme of minor changes attract a proportionate amount of press and PR? Will the boost in visitors and associated income be proportionate? Will the LAM receive the same boost in importance in the eyes of the LA? LAMs having undergone major development report feeling more secure afterwards due to the investment, does smaller scale investment have the same effect? A long term analysis of major developments in comparison with stepwise developments would be valuable in elucidating the relative effects of each approach.

### *Spending on Resilience*

ACE in particular contributed to resilience, with funding streams available to focus on business models and income diversification (Section 10.3.4). However, the grants appeared to focus on exploration but not implementation, meaning that further funds were needed to act upon the findings.

## **11.3 Discussion**

I found that LAMs were maintaining opening hours as far as possible, and though some museums had fewer visitors there was not an overall trend to reduced visitor numbers with different venues within a single service having mixed fortunes depending on programming, investment, and external factors. Further, I found an emphasis on visitors, with public programmes, temporary exhibitions, and refurbishments put forward as key strategies with which LAMs endeavoured to maintain favour with their LA and with the public. These activities can be funded through grants, making them viable when revenue funding is limited, and provide 'good news' stories, making them valuable to an LA that is cutting services and receiving bad press elsewhere. LAs appear to value that LAMs can bring in external funding, making this an all-round pragmatic strategy for the museums.

Unfortunately, this strategy provides something of a veneer under which core museum functions are being 'hollowed out'. Staffing losses appear to be focused on curation, conservation, and learning in comparison to increases in fundraising, marketing and commercial roles. Staff had to take on additional responsibilities, such as grant application writing, which reduced the time they could spend on their core activities. In particular, staff report struggling to spend time on collections work, express frustration about the difficulty of communicating the need to maintain collections standards, and raise concern that storage space will become more constrained over time. That a key function of a museum is the stewardship of collections was rarely mentioned in interviews and organisational documentation. Rationalisation of collections often had a

focus on retaining only items of local significance. While this is understandable for a small regional museum, it means that there is a decline in wider material being available and a loss of access to local communities. The concern over collections is particularly felt in smaller museums, but large services such as TWAM are also worried that knowledge and expertise in collections is eroding.

As such, the challenges of austerity may have solutions in the present, but they are short term and may compromise the access to museum collections of future generations. While museums are coping with the present situation, providing programmes to attract the public and please the LA, they are reducing their 'behind the scenes' services that in turn jeopardise their long term ability to provide the front-facing services.

### **11.3.1 Risks and Challenges**

#### *Financial Survival*

The methods suggested to help the heritage sector become more resilient in the wake of reduced government funding are not new ideas with achieving value for money, increasing income generation and increasing private finance having been demanded from museums since the 1980s. However, I found cases where earned income had still been considered a 'nice to have' prior to the economic crisis, but had become a priority in the wake of public spending cuts. This appears to be an absolute necessity for the survival of the LAM: that fundraising was required for most activities beyond the very basics of daily opening was a key theme that arose from the sampled museums. In particular, smaller services fundraised for small purchases, showing how little leeway they have in their budget.

While the majority were actively seeking alternative sources of income, the sampled cases conclusively believed that they could not survive without LA funding. They did not have high hopes for corporate fundraising, with even the larger services perceiving that they lack the network and skills to utilise this method extensively. They were more proactive about securing donations for visitors and Friends, but were far more reliant on grant giving organisations. They were developing their commercial offer through shops, cafes, venue hire, and consultancy. While there were examples of innovative income generation methods - from CIMS's collaborative museum practice degree, to TWAM's purchasing scheme - most cases pursued fairly common income generation activities.

There are clear drawbacks and obstacles to all sources of income in use by LAMs. Firstly, a clear finding is that it is necessary to spend to earn, with capital a necessity for organisations in the cultural sector. In order to attract visitors who will spend in the café and shop, pay entry fees for temporary exhibitions, and allow the service to report satisfactory visitor number performance to the LA, the service must have a continual programme of activities, exhibitions and refurbishments. Even Friends organisations, groups one would expect to have dedication to the museum take effort to maintain, with their support not to be taken for granted but rather actively managed.

Further, it is notable that most sources of income offered piecemeal support. Both fundraising and earned income required contributions from multiple sources. In particular with fundraising this meant that projects were approached on a step by step basis. With every additional source of income added, the resources required to manage the process and stakeholders increases. While the larger services may have the capacity to handle this, smaller services such as Saffron Walden Museum appeared to be struggling. This adds weight to the concern for the future of collections as it suggests that LAMs cannot afford to look after them without regular injections of external funding. Further, while temporary or project-based staff funded by grants makes sense for the current constraints, it will not be sustainable if there are not sufficient internal staff to actually bid for the grants in the first place.

### *Constraints on Change*

There were some cases where interviewees hoped that the financial constraints on museums would have positive outcomes by forcing them to fundamentally reconsider the things that they offered and mechanisms used to offer them, resulting in greater efficiency and effectiveness. There were also some examples of innovative change, such as Elmbridge Museum's outreach only service. Given declining visitor numbers to the outdated museum, being outreach only could create a service that is closer to the community it serves. The impact of this should be monitored, however.

Larger LAMs have more assets to use, giving opportunities to adapt, the ability to take more risks, and more scope to reduce scale and scope while maintaining a service. For example, Leicester could convert one museum back to a historic house interior and focus on special events instead of daily opening, as they have other museums and historic properties. Smaller museums have fewer opportunities to shrink without losing fundamental aspects of their service. Similarly, larger services have more opportunities to generate income as they have a wider range of staff skills and resources to utilise, such as TWAM offering consultancy to other museums. In contrast, smaller museums

do not have enough visitors to sustain even a café. However, smaller services also showed more reluctance and hesitation with regard to commercial initiatives, leaving it unclear what the potential would be if they tried.

In this respect, the norms of the museum sector inhibit change. For example, there remained an overall discomfort with entry fees as cases felt bound by the principles of access for all. Where fees were added or increased they were carefully justified and rationalised to be accepted. There was clear internal conflict between access and financial need. In some cases, expectations of the LAM sector deferred change: Leamington Spa Art Gallery and Museum acted passively to the cuts due to the perception that LA finances were always cyclical meaning that the situation was temporary.

Further, being part of an LA impedes change. Decision making in local government is bureaucratic and slow due to the hierarchical committee structure. LAs tend to avoid risk due to the requirement to be accountable to the central government and the general public. LA financial systems make it hard to spend money and to highlight income, hindering the push to commercialise. LAMs are constrained by LA communication and promotion rules, restricting their ability to promote themselves, develop a brand, and reach a wider audience.

The rapid onset of fiscal austerity and uncertainty of how it would develop further hindered change as LAs lacked the time to plan and make innovative changes. For example, some LAs rejected alternative models, such as trust status or partnerships with other services, as it would not bring the immediate savings they needed, rather enabling long term savings and income generation. Fiscal austerity precludes the maintenance of organisational slack that is associated with the agility needed to adapt to the changing environment.

LAs can be disinclined to devolve or otherwise give freedoms to LAMs as the museums bring reputational benefits that few other services have. LAMs appear to perceive that impressing LAs with their reputation and historical importance is worthwhile, press coverage was often reported in committee, and it was perceived that LAMs were well placed to provide 'good news stories' that other, less-photogenic, services could not.

### *Capital Projects and HLF*

A concern is the apparent reliance on HLF. Grants from HLF were considered the default source of funds for refurbishments and major developments. Though smaller projects found funds from other sources, even if there are other options for large

projects it appears that LAMs are not aware of them or believe HLF to be the best option. With this reliance, what will happen if lottery sales drop and HLF funds fall?

Further, LAMs perceived a large HLF project as an answer to their financial difficulties with the idea that a major development would enable them to attract enough visitors and generate enough income to impress the LA while reducing their financial reliance on it. For example, the Saffron Walden Museum and Cromwell Museum interviewees perceived a major development as essential in securing their future. Certainly, the decision to close Elmbridge Museum came soon after the service failed to win an HLF grant to move to a new site. In comparison, the developments at the William Morris Gallery and Colchester Castle appeared to inject new life into the venues. In this regard, success stories and perceived lack of other options has made major refurbishments funded by HLF an aspiration for LAMs, as if it is a panacea that will save the museum.

LAMs report external funding to LAs in terms of prestige, and there is evidence that LAs do value LAMs for the external funding that they bring. Museums do need to keep up with visitor expectations, both in terms of updating exhibits and improving facilities, and there is evidence that redevelopments result in increased visitor numbers and self-generated income, if only on a temporary basis. As such, LAMs appear to be in a cycle whereby they must favour prestige over practicality, necessarily securing funding and embarking on high profile projects in order to keep momentum in terms of LA and visitor support.

The critical importance of capital projects is similar to the importance of maintaining active public programmes, and the current picture regarding sources of income shows that the sector remains heavily reliant on HLF, ACE and other trusts. The fate of the sector is therefore in the tenuous hands of these organisations that have over-extended themselves and may be subject to further cuts of their own. Perhaps due to these sources maintaining the museums, at present there is no 'Plan B' for generating this amount of income or demonstrating value from any of the sampled LAMs.

### **11.3.2      *Implications and Recommendations***

#### *Governance and Management*

Governance will always be a compromise for LAMs. None of the sampled museums provided a set of clear recommendations for the future of the sector, though there were ideas that warrant investigation. For example, the Cromwell Museum hoped to benefit from the range of trustees that were appointed to bring different skills and experience.

For services not devolved to trust, of interest to LAMs is the method used by Bath Heritage Services where an advisory board of external experts is used to give weight to their plans and decisions in the eyes of the LA.

As has been found previously, becoming a trust is not an easy answer: trusts benefit from reduced bureaucracy but where they receive funding from the LA must still manage LA expectations. Smaller museums benefit from the support of the LA to deliver services such as payroll, HR and IT that they would struggle to hold in house.

Remaining within the LA means being affected by wider initiatives and events that may generate obstacles or increase workloads. Committees are challenging as not all councillors are interested meaning that the museum becomes a 'hostage to fortune' regarding the membership of the relevant committees each year.

Similarly, the joint services had benefits and drawbacks. They can benefit from having closer direct contact with LA decision makers through a dedicated joint museums committee, from economies of scale, and from increased presence in terms of regional leadership and associated national funds. In contrast, communication and understanding between stakeholders was challenging.

### *Embracing the Politics*

There was a striking difference between cases that felt part of the LA and those that felt 'other'. Those that gave the impression of feeling like part of the LA did not receive lower cuts but reported understanding of the need to make cuts and showed an active response to them. These LAMs sometimes had a dedicated museum committee to provide access to decision makers, and tended to report their aims in line with the wider aims of the LA. Where LAMs 'embraced the politics' by situating themselves as a clear part of the council they appeared to do better, or at least staff felt better.

Certainly, LA support for these LAMs was often not financial, with councils reporting that their hands are tied and the museums must find ways to help themselves.

Critically, these LAMs responded actively to the situation and pursued alternative sources of income and more efficient ways of working. Further, LAs propped up shortfalls, allowed overspends, and retained ownership of collections, suggesting that something of a safety net remains.

In comparison, there were distant LAMs that felt marginalised by the LA and had an antagonistic relationship with it. They were geographically, hierarchically, or culturally distant from the LA, and failed to connect their activities to the LAs priorities. These tended to be smaller LAMs, lower in the LA hierarchy, but even large LAMs become

lost in large LAs, such as Birmingham City Council. These LAMs felt stuck and like they did not have the support to implement change. A recommendation, then, is for LAMs to be active within the wider LA as far as possible, to strategically build relationships and work collaboratively, therefore generating mutual understanding and support. Organisations like ACE would be vital in supporting staff with developing the skills and experience to drive initiatives forward.

### *The Value of Museums*

The economics of museums in combination with the development of public policy in the UK has left museums in a position that they cannot wholly achieve any of their many values. The value of museum collections is incompatible with financial independence. The necessity of public funding to cover the high fixed costs of collections mean that museums cannot avoid the impact of public policy. They must position themselves as responding to political priorities even though they are rarely directly aimed at museums, and never directly at collections. While public funding is required for core museum functions that may be unconsciously valued, public policy discourse does not focus on this valuation due to the need to show something tangible in return for investment. The requirements of museums are therefore vague and the means of demonstrating value tangential.

In addition, the activities required to secure funding from donors requires museums to adopt a social welfare image, but earning income through the sale of goods and services requires business-like organisational structures and management approaches. In addition, HLF demands outreach and access in projects that it funds. High profile public programmes, including temporary exhibitions, were used by case studies strategically to increase their profile, attract visitors and generate income. They were a necessary focus for many of the cases, despite concern that this was to the detriment of collections work. Museums are subject to many stakeholders with differing expectations, meaning that their management is ultimately not guided by the intrinsic value of collections but a juggling act of appeasement to all who have a stake in keeping the museum funded.

Further, the museums themselves seemed convinced by their instrumental values, but performance measures centred on visitor numbers and value for money with little attempt to report performance specifically in terms of the wider objectives described. For example, if it was stated that the museum contributed towards making the area desirable for residents then evidence of this was not presented beyond programmed events and attendance.



Beyond visitor numbers, the key way that museums appeared to justify their value to LAs was through bringing in funding. For example, whether they demonstrably did or not, the fact that they could be awarded external funding was regularly used in justifying the need to maintain ACE accreditation and therefore professional standards. This suggests that LAMs should focus on sourcing external funding to raise their profile within the LA. Bath Heritage Services demonstrates this through the dichotomy of the economically important Roman Baths and the commercially unsuccessful art gallery. The service appears to exploit the economic potential of the Baths, thus appeasing the LA, but does so to enable provision of the remainder of the service and has to work hard to ensure that the resources are valued and cared for appropriately.

Another way that LAMs may stay valued by LAs is by focusing on their public activity and image, expressing their reputation and historical importance. In this study, public support to LAMs gave them a stay of execution, and LAs seemed to value the 'good news stories' the museums could provide. As such, staying in the public eye may make it difficult to LAs to reduce their museums services without their reputation suffering.

### *Rationalising the Sector*

Given the challenges of funding museums and the constraints of fiscal austerity, Bradburne argues that it is time to reduce the number of museums:

[...] perhaps some of these museums can be consolidated, their collections joined with the consequence of greater rotation and greater perceived change. In the museum market, surely some museums should be allowed to swallow others, while still others become extinct?  
(Bradburne, 2010: 151)

Elmbridge Museum was poorly located and outdated, suffering decreasing visitor numbers, and it was closed to leave an outreach only service. What was lost when the museum closed? Small scale temporary displays in libraries and other public buildings are now the point of access for most people, offering brief encounters with the collections only. To visit a traditional museum local people must now go elsewhere, though there are other local museums nearby and its loss may have been more keenly felt in other parts of the country. Of course, in this case collections were rationalised too, with items not directly related to the district disposed of, further reducing access. However, the remaining collections may be better cared for and therefore preserved for future generations.

One could argue that the Cromwell Museum should have closed and the collections transferred to the National Civil War Centre in Newark. The present museum building in Huntingdon is limited in size and will never be able to offer visitor facilities, not even having running water. The National Civil War Centre could have offered an up-to-date display of the collections and a more attractive overall experience for visitors. If this had happened, what would the residents of Huntingdon have lost? The museum has a central position in the town centre in the building that would be difficult to use in a different way, it offers a visible connection to a point of pride the town's heritage, and a local educational resource for schools. It also offers part of a Civil War or Oliver Cromwell 'trail' for enthusiasts. While visitor numbers are low and the museum outdated, its loss would be felt.

If small museums with little opportunity for income generation are to be retained, consolidation into larger groups would be an option. Again as in Bath, a commercially exploitable resource could enable the maintenance of the remainder. This was to some extent the aim of Renaissance, and there have been regular calls for increased sector cooperation over time. However, the majority of large services are struggling and the profitability of the Roman Baths is an outlier, meaning that few are likely to be willing to take on a venue that cannot contribute itself. Instead, museums report supporting each other by sharing knowledge and experience through formal and informal networks.

### **11.3.3 Final Conclusions**

This study shows that LAMs are stuck in a situation whereby they must seek piecemeal funding from multiple sources, maintain public support and standing within their LA, and be responsive to national funders. This means offering a prominent public programme, being active within the LA, and seeking HLF funding for major developments in order to maintain their visibility and profile.

Of importance is that this necessary strategy does not relate directly to one of the core functions of museums: the stewardship of collections. Of particular concern is the long term impact on collections and 'knowledge'. Ideally, public funding would support collections but we have seen that this is unrealistic. Though it is inherently risky, the strategy must therefore be to exploit their popular and commercial offer to carry the collections. Otherwise, the resource will be lost for future generations. Support organisations like ACE would be well placed to focus on developing the skills of LAM staff to work effectively in this environment.

## 11.4 Further Research

An aim of this project was to investigate the impact of austerity on LAMs from the top down, starting with a national overview and moving to more detailed case studies. The study has also been comprehensive in coverage of aspects of museums. It has been limited by timescale as the financial situation is ongoing. As such, this study has been broad and has made a move towards depth within the constraints of the time and resources available, but leaves clear room for further work with more specific focus. Focus could be on a specific scale of LAM or on specific aspects of museum service, such as collections or corporate fundraising, or both, such as income generation in smaller services.

Some of the cases in this study provide opportunities for further study. In some cases it was too soon to assess efficacy. For example for the Cromwell Museum at the time that the organisational documentation review and interviews were undertaken, the Trust was not yet fully established. The business model appears tenuous, requiring consistent success in fundraising in order to retain the qualified curator necessary for accreditation. Further, the enthusiasm of volunteers must be maintained to keep the museum open regularly, to run events and work with schools. Success also depends upon developing partnerships across the region to encourage visitors. It would not be surprising if the museum was reduced to opening by appointment in the near future. However, a strong board of trustees and an influential patron were appointed, providing hope.

Birmingham Museum Trust reports success in increasing income and making savings, but also that staffing is at the lowest level possible and further cuts to LA subsidy will necessitate site closures. The future of Birmingham Museum Trust is of particular interest due to the scope of their collections, which were described as ‘...equivalent in size and richness to a lot of national collections’ (Interview 14). If the future of the collections is jeopardised, will there be a national solution?

Other themes that warrant further work include the juxtaposition between reported and perceived cooperation within the sector. Interviewees felt that they had valuable sectoral relationships but greater cooperation is commonly advocated. A more in-depth study of agility and opportunistic working would be worthwhile, to assess both its viability in LAMs and effects: does chasing funding result in a fragmented, inconsistent services or an agile, innovative service? This study has not looked at the impact of change on communities, including change in governance. For example, are joint services cut off from the people they ostensibly serve?

Finally, I have argued that major capital developments may be a necessity to sustain support for the sector despite the drawbacks and criticism of the approach. A further study would investigate capital development, shedding light on their value beyond the immediate boost in visitor numbers, looking at perception of and support for museums. It would also produce a timeline for capital developments, developing understanding of the longevity of benefits and comparing them to smaller projects. This would provide a foundation for strategic decision making in the sector.

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## Interviews

<b>Number</b>	<b>Interviewee</b>	<b>Local Authority</b>
1	Manager	Cambridgeshire County Council
2	Director	Leicester City Council
3	Officer	Elmbridge Borough Council
4	Officer	Elmbridge Borough Council
5	Director	Warwick District Council
6	Assistant	Cambridgeshire County Council
7	Manager	Uttlesford District Council
8	Director	Bath and North East Somerset Council
9	Director	Ipswich Borough Council
10	Officer	Worcestershire County Council
11	Officer	Worcestershire County Council
12	Assistant	Worcestershire County Council
13	Director	Newcastle-upon-Tyne City Council
4	Director	Birmingham City Council

## Appendix One: Phase One - National Overview

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### Data Collected

**Table 54: Local Authority Data**

<b>Data</b>	<b>Description</b>	<b>Categories</b>	<b>Sources</b>
Name	The full name of the Local Authority.	N/A	(Office for National Statistics, 2014b)
Region	The geographical region in which the Local Authority is located.	South East, South West, North East, North West, East, London, East Midlands, West Midlands, Yorkshire and Humberside.	(Department for Communities and Local Government, 2009, 2011, 2012a, 2012b, 2014a, 2015)
Class	The class or type of Local Authority. Different classes of LA have different responsibilities and levels of authorities.	Shire District, Shire County, Metropolitan District, Unitary Authority, London Borough,	(Department for Communities and Local Government, 2009, 2011, 2012a, 2012b, 2014a, 2015)
Formation Date	A number of Local Authorities were abolished in 2009 and their	2009 or pre-2009	(Department for Communities and Local Government, 2008a,

	responsibilities transferred to newly formed Unitary Authorities. The 2015 LA structure was used and therefore data for those that were formed in 2009 was not directly available for prior to this date. Data from the previous structure was collated to produce an estimate of these unavailable figures. This field, therefore, was used to flag the estimated figures so that analysis could be repeated with and without them.		2008b, 2008c, 2008d, 2008e, 2008f, 2008g, 2008h, 2008i)
Political Affiliation in 2011	The outcome of the Local Authority Election in 2011 or the election most closely proceeding.	Conservative, Labour, Liberal Democrat, No Overall Control (NOC), Independent.	(Ball, 2013; BBC, 2008, 2009; City of London, 2014; Council of the Isles of Scilly, 2013a, 2013b; Mid Sussex District Council, 2014; Northampton Borough



			Council, 2014; The Guardian, 2010, 2011, 2012, 2014)
Population	The population of the LA catchment area aged 16 or over	N/A	(Office for National Statistics, 2014b)
Unemployment	The population over the age of 16 that are classified as 'Economically Active: Unemployed', therefore excluding those that are economically inactive, such as full-time students and the retired.	N/A	(Office for National Statistics, 2014b)

**Table 55: Local Authority Financial Data**

Data	Description	Sources
Change in Spending Power (%)	Spending power is the combination of central government funding and the money that LAs raise themselves through council tax and business rates (Hastings et al., 2013: 2). The	(Department for Communities and Local Government, 2013, 2014b)

	percentage change in this figure from the previous year has been reported yearly by the Department for Communities and Local Government since 2011-2012	
Revenue - All Services	Total revenue expenditure on all services by each LA, reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014	(Department for Communities and Local Government, 2009, 2011, 2012a, 2012b, 2014a, 2015)
Revenue - Culture	Total revenue expenditure on services categorised as 'Culture and related services', as reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014. This is a sub-set of the above Revenue - All Services	(Department for Communities and Local Government, 2009, 2011, 2012a, 2012b, 2014a, 2015)
Revenue - Museums	Total revenue expenditure on services categorised as 'Museums and Galleries'; as reported by the Department for Communities and Local Government each year from 2008-	(Department for Communities and Local Government, 2009, 2011, 2012a, 2012b, 2014a, 2015)

	2009 to 2013-2014. This is a sub-set of the above Revenue - Culture	
Revenue - Heritage	Total revenue expenditure on services categorised as 'Heritage Services'; as reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014. This is a sub-set of the above Revenue - Culture	(Department for Communities and Local Government, 2009, 2011, 2012a, 2012b, 2014a, 2015)
Capital - All Services	Total capital expenditure on all services by each LA, reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014	(Department for Communities and Local Government, 2009, 2011, 2012a, 2012b, 2014a, 2015)
Capital - Culture	Total capital expenditure on services categorised as 'Culture and related services', as reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014. This is a sub-set of the above Capital - All Services	(Department for Communities and Local Government, 2009, 2011, 2012a, 2012b, 2014a, 2015)

Capital - Museums	Total capital expenditure on services categorised as 'Museums and Galleries'; as reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014. This is a sub-set of the above Capital - Culture	(Department for Communities and Local Government, 2009, 2011, 2012a, 2012b, 2014a, 2015)
Capital - Heritage	Total capital expenditure on services categorised as 'Heritage Services'; as reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014. This is a sub-set of the above Capital - Culture	(Department for Communities and Local Government, 2009, 2011, 2012a, 2012b, 2014a, 2015)
Income - Museums	Total income from services categorised as 'Museums and Galleries', as reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014.	(Department for Communities and Local Government, 2009, 2011, 2012a, 2012b, 2014a, 2015)

Income - Heritage	Total income from services categorised as 'Museums and Galleries', as reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014.	(Department for Communities and Local Government, 2009, 2011, 2012a, 2012b, 2014a, 2015)
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**Table 56: Calculated Local Authority Financial Data**

<b>Data</b>	<b>Description</b>	<b>Calculated from</b>
Unemployment Rate	The percentage of the population over the age of 16 that are classified as 'Economically Active: Unemployed'	Population Unemployment
Revenue - All Services except Museums	Total revenue expenditure on all services except those categorised as 'Museums and Galleries' and 'Heritage Services' by each LA, reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014. All figures adjusted to account for inflation to match 2013-2014 values	Revenue - All Services Revenue - Museums Revenue - Heritage Inflation Rates

Change in Revenue – All Services except Museums	Actual change in revenue expenditure on all services except those categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government, between 2008-2009 and 2013-2014. All figures adjusted for inflation to match 2013-2014 values	Revenue - All services except museums 2008-2009 Revenue - All services except museums 2013-2014 Inflation Rates
Ratio Change in Revenue – All Services except Museums	Revenue expenditure on all services except those categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government, in 2013-2014 divided by revenue expenditure in 2008-2009. All figures adjusted to account for inflation to match 2013-2014 values	Revenue - All services except museums 2008-2009 Revenue - All services except museums 2013-2014 Inflation Rates
Revenue – All Cultural Services except Museums	Total revenue expenditure on services categorised as 'Culture and related services'	Revenue - Culture Revenue - Museums

	except those categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014. All figures adjusted to account for inflation to match 2013-2014 values	Revenue - Heritage Inflation Rates
Change in Revenue – All Cultural Services except Museums	Actual change in revenue expenditure on services categorised as 'Culture and related services' except those categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government, between 2008-2009 and 2013-2014. All figures adjusted to account for inflation to match 2013-2014 values	Revenue – All Cultural services except museums 2008-2009 Revenue – All Cultural services except museums 2013-2014 Inflation Rates
Ratio Change in Revenue – All Cultural Services except Museums	Revenue expenditure on services categorised as 'Culture and related services' except those categorised as 'Museums and	Revenue – All Cultural services except museums 2008-2009

	Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government, in 2013-2014 divided by revenue expenditure in 2008-2009. All figures adjusted to account for inflation to match 2013-2014 values	Revenue – All Cultural services except museums 2013-2014 Inflation Rates
Revenue - Museums and Heritage	Total revenue expenditure on services categorised as 'Museums and Galleries' and those categorised as 'Heritage Services', as reported by the Department for Communities and Local Government each year from 2008-2009 to 2014-2015. All figures adjusted to account for inflation to match 2013-2014 values	Revenue - Museums Revenue - Heritage Inflation Rates
Change in Revenue – Museums and Heritage	Actual change in revenue expenditure on services categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government, between 2008-2009	Revenue - Museums and Heritage 2008-2009 Revenue - Museums and Heritage 2013-2014



	and 2013-2014. All figures adjusted to account for inflation to match 2013-2014 values	
Ratio Change in Revenue – Museums and Heritage	Revenue expenditure on services categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government, in 2013-2014 divided by revenue expenditure in 2008-2009. All figures adjusted to account for inflation to match 2013-2014 values	Revenue - Museums and Heritage 2008-2009 Revenue - Museums and Heritage 2013-2014
Capital - All Services except Museums	Total capital expenditure on all services except those categorised as 'Museums and Galleries' and 'Heritage Services' by each LA, reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014. All	Capital - All Services Revenue - Museums Revenue - Heritage Inflation Rates

	figures adjusted to account for inflation to match 2013-2014 values	
Change in Capital – All Services except Museums	Actual change in Capital expenditure on all services except those categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government, between 2008-2009 and 2013-2014. All figures adjusted for inflation to match 2013-2014 values	Capital - All services except museums 2008-2009 Capital - All services except museums 2013-2014 Inflation Rates
Ratio Change in Capital – All Services except Museums	Capital expenditure on all services except those categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government, in 2013-2014 divided by Capital expenditure in 2008-2009. All figures adjusted to account for inflation to match 2013-2014 values	Capital - All services except museums 2008-2009 Capital - All services except museums 2013-2014 Inflation Rates

<p>Capital – All Cultural Services except Museums</p>	<p>Total Capital expenditure on services categorised as 'Culture and related services' except those categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014. All figures adjusted to account for inflation to match 2013-2014 values</p>	<p>Capital - Culture  Capital - Museums  Capital - Heritage  Inflation Rates</p>
<p>Change in Capital – All Cultural Services except Museums</p>	<p>Actual change in Capital expenditure on services categorised as 'Culture and related services' except those categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government, between 2008-2009 and 2013-2014. All figures adjusted to account for inflation to match 2013-2014 values</p>	<p>Capital – All Cultural services except museums 2008-2009  Capital – All Cultural services except museums 2013-2014  Inflation Rates</p>

<p>Ratio Change in Capital – All Cultural Services except Museums</p>	<p>Capital expenditure on services categorised as 'Culture and related services' except those categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government, in 2013-2014 divided by Capital expenditure in 2008-2009. All figures adjusted to account for inflation to match 2013-2014 values</p>	<p>Capital – All Cultural services except museums 2008-2009  Capital – All Cultural services except museums 2013-2014  Inflation Rates</p>
<p>Capital - Museums and Heritage</p>	<p>Total Capital expenditure on services categorised as 'Museums and Galleries' and those categorised as 'Heritage Services', as reported by the Department for Communities and Local Government each year from 2008-2009 to 2014-2015. All figures adjusted to account for inflation to match 2013-2014 values</p>	<p>Capital - Museums  Capital - Heritage  Inflation Rates</p>

Change in Capital – Museums and Heritage	Actual change in Capital expenditure on services categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government, between 2008-2009 and 2013-2014. All figures adjusted to account for inflation to match 2013-2014 values	Capital - Museums and Heritage 2008-2009 Capital - Museums and Heritage 2013-2014
Ratio Change in Capital – Museums and Heritage	Capital expenditure on services categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government, in 2013-2014 divided by Capital expenditure in 2008-2009. All figures adjusted to account for inflation to match 2013-2014 values	Capital - Museums and Heritage 2008-2009 Capital - Museums and Heritage 2013-2014
Capital – All Cultural Services except Museums	Total capital expenditure on services categorised as 'Culture and related services' except those categorised as 'Museums and	Capital - Culture Capital - Museums Capital - Heritage

	Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014. All figures adjusted to account for inflation to match 2013-2014 values	Inflation Rates
Capital - Museums and Heritage	Total capital expenditure on services categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014. All figures adjusted to account for inflation to match 2013-2014 values	Capital - Museums Capital - Heritage Inflation Rates
Income - Museums and Heritage	Total income from services categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government each year from 2008-2009 to 2013-2014. All	Income - Museums Income - Heritage Inflation Rates

	figures adjusted to account for inflation to match 2013-2014 values	
Change in Income – Museums and Heritage	Actual change in Income from services categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government, between 2008-2009 and 2013-2014. All figures adjusted to account for inflation to match 2013-2014 values	Income - Museums and Heritage 2008-2009 Income - Museums and Heritage 2013-2014
Ratio Change in Income – Museums and Heritage	Income from services categorised as 'Museums and Galleries' and 'Heritage Services', as reported by the Department for Communities and Local Government, in 2013-2014 divided by income from 2008-2009. All figures adjusted to account for inflation to match 2013-2014 values	Income - Museums and Heritage 2008-2009 Income - Museums and Heritage 2013-2014
Income Proportion of Revenue 2008-2009	Total income from services categorised as 'Museums and Galleries' and 'Heritage	Income - Museums and Heritage 2008-2009

	Services, as reported by the Department for Communities and Local Government, from 2008/2009 divided by revenue expenditure on these services from 2008/2009, to view income as a proportion of expenditure	Revenue - Museums and Heritage 2008-2009
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**Table 57: Museums Data**

<b>Data</b>	<b>Description</b>	<b>Categories</b>
Museum Name	The name of each museum	N/A
Museum Type in 2007	A broad category for the governance model of each museum.	Joint Local Authority Museum, Joint Local Authority with Partner, Local Authority Museum, Local Authority with Partner, Charitable Trust with Local Authority as Trustee, Charitable Trust without Local Authority as Trustee, University Museum, N/A
Museum Type in 2015	A broad category for the governance model of each museum.	Joint Local Authority Museum, Joint Local Authority with Partner, Local Authority Museum, Local Authority with Partner, Charitable Trust with Local Authority as Trustee, Charitable Trust without Local Authority as Trustee, University Museum, N/A

Partner	Whether the museum is managed with another LA or a non-LA partner or not	Yes, no
Governing Local Authority(s)	The name of each Local Authority that governs the museum	N/A

(Museums Association, n.d.)

**Table 58: Calculated Local Authority and Local Authority Museums Data**

<b>Data</b>	<b>Description</b>	<b>Calculated from</b>
Museums Y/N	Whether or not each LA directly governs or manages an LAM or not	Local Authority Name Governing Local Authority(s) (see Museums Data below)
Number of Museums	How many LAMs each LA directly governs or manages	Local Authority Name Governing Local Authority(s) (see Museums Data below)

Partners Y/N	Whether the LA manages museums with another LA or a non-LA partner	Partner Governing Local Authority(s)
Change	Whether the LA has made any governance or management changes to museums, such as devolving them to trust or making closures	Museum Type in 2007 Museum Type in 2015 Governing Local Authority(s)
Closures Y/N	Whether the LA has closed any museums	Museum Type in 2007 Museum Type in 2015 Governing Local Authority(s)
To Trust	Whether the LA has devolved any museums to Trust	Museum Type in 2007 Museum Type in 2015 Governing Local Authority(s)

## Adjusting Financial Data for Inflation

Due to inflation, £1 in 2005 is worth more than £1 in 2014. As such, when looking at the reported figures it is not clear whether a museum with an income of £1,000,000 in 2005/06 and £1,000,500 in 2012/14 actually saw an increase in their spending power. Therefore, in order to make the figures presented in previous financial accounts comparable with the most up to date figures, one must adjust for inflation.

To adjust for inflation, Consumer Price Index (CPI) figures by month were taken from the Office for National Statistics (Table 59). CPI was chosen over GDP Deflator, and other methods of calculating inflation, due to its inclusion of goods produced overseas. Sterling has been weakened and emerging economies strengthened, meaning that the price of imported good such as food and energy has increased above expectations. GDP Deflator was low during the period under investigation due to the weakness of the UK's economy, and reflects the UKs production. To use GDP deflator would be misleading, as without considering the impact of imported goods that consumers rely upon we cannot assess the overall impact on spending power (Coombs, 2013; Dolphin, 2011).

Using instructions provided by the House of Commons Library an average of the CPIs for each financial year (April to March, Table 60) was taken and CPIs were converted into inflation rates between each year reported and 2013-2014 (Table 61) (Thompson, 2009). Then, each figure from a year earlier than 2013-2014 was multiplied by the inflation rate in order to provide an estimate of what the value of the figure would have been in 2012-2013. For example, the average CPI for 2007-2008 was 105.32 and for 2013-2014 was 126.9. This gives an inflation rate of 118%. Therefore, for the imagined museum with an income of £1,000,000 this adjusts to £1,180,000 in 2013-2014 terms. This shows that, although the museum's income appeared to have risen in 2013-2014 (to £1,000,500) it has actually decreased in real terms.

**Table 59: Consumer Price Index per month**

<b>Year/Month</b>	<b>CPI</b>	<b>Year/Month</b>	<b>CPI</b>	<b>Year/Month</b>	<b>CPI</b>
2007 APR	104.5	2009 AUG	111.4	2011 DEC	121.7
2007 MAY	104.8	2009 SEP	111.5	2012 JAN	121.1
2007 JUN	105	2009 OCT	111.7	2012 FEB	121.8
2007 JUL	104.4	2009 NOV	112	2012 MAR	122.2
2007 AUG	104.7	2009 DEC	112.6	2012 APR	122.9
2007 SEP	104.8	2010 JAN	112.4	2012 MAY	122.8
2007 OCT	105.3	2010 FEB	112.9	2012 JUN	122.3
2007 NOV	105.6	2010 MAR	113.5	2012 JUL	122.5
2007 DEC	106.2	2010 APR	114.2	2012 AUG	123.1
2008 JAN	105.5	2010 MAY	114.4	2012 SEP	123.5
2008 FEB	106.3	2010 JUN	114.6	2012 OCT	124.2
2008 MAR	106.7	2010 JUL	114.3	2012 NOV	124.4
2008 APR	107.6	2010 AUG	114.9	2012 DEC	125
2008 MAY	108.3	2010 SEP	114.9	2013 JAN	124.4
2008 JUN	109	2010 OCT	115.2	2013 FEB	125.2
2008 JUL	109	2010 NOV	115.6	2013 MAR	125.6
2008 AUG	109.7	2010 DEC	116.8	2013 APR	125.9
2008 SEP	110.3	2011 JAN	116.9	2013 MAY	126.1
2008 OCT	110	2011 FEB	117.8	2013 JUN	125.9
2008 NOV	109.9	2011 MAR	118.1	2013 JUL	125.8
2008 DEC	109.5	2011 APR	119.3	2013 AUG	126.4
2009 JAN	108.7	2011 MAY	119.5	2013 SEP	126.8
2009 FEB	109.6	2011 JUN	119.4	2013 OCT	126.9
2009 MAR	109.8	2011 JUL	119.4	2013 NOV	127
2009 APR	110.1	2011 AUG	120.1	2013 DEC	127.5
2009 MAY	110.7	2011 SEP	120.9	2014 JAN	126.7
2009 JUN	111	2011 OCT	121	2014 FEB	127.4
2009 JUL	110.9	2011 NOV	121.2	2014 MAR	127.7

*(Office for National Statistics, 2014c)*

**Table 60: Average Consumer Price Index per Financial Year**

<b>Financial Year</b>	<b>Average CPI</b>
2007-2008	105.32
2008-2009	109.28
2009-2010	111.73
2010-2011	115.64
2011-2012	120.63
2012-2013	123.83
2013-2014	126.68

**Table 61: Inflation rate between year reported and 2012-2013**

<b>Financial Year</b>	<b>Inflation Rate</b>
2007-2008	1.18
2008-2009	1.13
2009-2010	1.11
2010-2011	1.07
2011-2012	1.03
2012-2013	1.05
2013-2014	1.02

## Analysis Plan

### ***Objective One: Create an Overview of LAMs Prior to Austerity so that Change can be Identified***

Question	Dependent Variable		Independent Variable		Statistical Methods
	Name	Type	Name	Type	
How many LAs directly govern and manage LAMs?	Museums Y/N	Categorical	N/A	N/A	Visual Statistics
Is there any pattern in whether LAs directly govern and manage LAMs or not	Museums Y/N	Categorical	Class	Categorical	Visual Statistics Chi-Square Test
		Categorical	Region	Categorical	Visual Statistics Chi-Square Test
	Number of Museums	Categorical	Class	Categorical	Visual Statistics Chi-Square Test
		Categorical	Region	Categorical	Visual Statistics Chi-Square Test

How much do LAs spend on LAMs? Both revenue and capital	Revenue – Museums and Heritage 2008-2009		N/A	N/A	Visual Statistics
	Revenue – Museums and Heritage 2008-2009	Continuous, Non-Normal	Museums Y/N	Categorical	Kruskal-Wallis Test
	Revenue – Museums and Heritage 2008-2009	Continuous, Non-Normal	Number of Museums	Categorical	Kruskal-Wallis Test
	Capital – Museums and Heritage 2008-2009	Continuous, Non-Normal	N/A	N/A	Visual Statistics
	Capital – Museums and Heritage 2008-2009	Continuous, Non-Normal	Museums Y/N	Continuous, Non-Normal	Kruskal-Wallis Test
	Capital – Museums and Heritage 2008-2009	Continuous, Non-Normal	Number of Museums	Continuous, Non-Normal	Kruskal-Wallis Test



	Revenue – Museums and Heritage 2008-2009	Continuous, Non-Normal	Capital – Museums and Heritage 2008-2009	Continuous, Non-Normal	Spearman's Correlation
Do LA characteristics such as type of LA and region affect how much LAs spend on LAMs?	Revenue – Museums and Heritage 2008-2009	Continuous, Non-Normal	Region	Categorical	Kruskal-Wallis Test
	Revenue – Museums and Heritage 2008-2009	Continuous, Non-Normal	Class	Categorical	Kruskal-Wallis Test
How does spending on LAMs compare to spending on other services?	Revenue – All Services except Museums 2008-2009	Continuous, Non-Normal	Revenue – Museums and Heritage 2008-2009	Continuous, Non-Normal	Spearman's Correlation
	Revenue – All Cultural Services except Museums 2008-2009	Continuous, Non-Normal	Revenue – Museums and Heritage 2008-2009	Continuous, Non-Normal	Spearman's Correlation
How do LAs govern/manage their LAMs?	Partners Y/N	Categorical	Region	Categorical	Visual Statistics Chi-Square Test
	Partners Y/N	Categorical	Class	Categorical	Visual Statistics

					Chi-Square Test
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**Objective Two: Create an Overview of Changes to LAMs since the Implementation of the Policy of Fiscal Austerity**

Question	Dependent Variable		Independent Variable		Statistical Method
	Name	Type	Name	Type	
How has LA spending on LAMs changed? Both revenue and capital	Revenue – Museums and Heritage 2013-2014	Continuous, Non-Normal	Revenue – Museums and Heritage 2008-2009	Continuous, Non-Normal	Spearman's Correlation
	Capital – Museums and Heritage 2013-2014	Continuous, Non-Normal	Capital – Museums and Heritage 2008-2009	Continuous, Non-Normal	Spearman's Correlation
	Ratio Change in Capital – Museums and Heritage	Continuous, Non-Normal Could be split into categories	Ratio Change in Revenue – Museums and Heritage	Continuous, Non-Normal Could be split into categories	Spearman's Correlation Chi-Square
How does change in spending on LAMs	Ratio Change in Revenue – All	Continuous, Non-Normal	Ratio Change in Revenue – Museums and Heritage	Continuous, Non-Normal	Visual Statistics Spearman's Correlation

compare to spending on other services?	Services except Museums	Could be split into categories			Chi-Square Test
	Ratio Change in Revenue – All Cultural Services except Museums	Continuous, Non-Normal Could be split into categories	Ratio Change in Revenue – Museums and Heritage	Continuous, Non-Normal	Visual Statistics Spearman's Correlation Chi-Square Test
	Ratio Change in Capital – All Services except Museums	Continuous, Non-Normal Could be split into categories	Ratio Change in Capital – Museums and Heritage	Continuous, Non-Normal Could be split into categories	Visual Statistics Spearman's Correlation Chi-Square Test
	Ratio Change in Capital – All Cultural Services except Museums	Continuous, Non-Normal Could be split into categories	Ratio Change in Capital – Museums and Heritage	Continuous, Non-Normal Could be split into categories	Visual Statistics Spearman's Correlation Chi-Square Test
Do LA characteristics such as type of LA	Change in Revenue – Museums and Heritage	Continuous, Non-Normal	Region	Categorical	Visual Statistics

and region affect change in spending?	Change in Revenue – Museums and Heritage	Continuous, Non-Normal	Class	Categorical	Visual Statistics
	Ratio Change in Revenue – Museums and Heritage	Continuous, Non-Normal Could be split into categories	Region	Categorical	Kruskal-Wallis Test Chi-Square Test
	Ratio Change in Revenue – Museums and Heritage	Continuous, Non-Normal Could be split into categories	Class	Categorical	Kruskal-Wallis Test Chi-Square Test
	Ratio Change in Revenue – Museums and Heritage	Continuous, Non-Normal Could be split into categories	Unemployment Rate	Continuous, Non-Normal	Spearman's Correlation
	Ratio Change in Revenue – Museums and Heritage	Continuous, Non-Normal Could be split into categories	Political Affiliation	Categorical	Kruskal-Wallis Test Chi-Square Test

How has income from museums changed?	Income – Museums and Heritage	Continuous, Non-Normal	N/A	N/A	Visual Statistics
	Income Proportion of Revenue 2008-2009	Continuous, Non-Normal	N/A	N/A	Visual Statistics
	Ratio Change in Revenue – Museums and Heritage	Continuous, Non-Normal Could be split into categories	Income Proportion of Revenue 2008-2009	Continuous, Non-Normal	Kruskal-Wallis Test
	Ratio Change in Income – Museums and Heritage	Continuous, Non-Normal	N/A	N/A	Visual Statistics
	Income – Museums and Heritage 2008-2009	Continuous, Non-Normal	Income – Museums and Heritage 2013-2014	Continuous, Non-Normal	Visual Statistics
	Ratio Change in Income – Museums and Heritage	Continuous, Non-Normal Could be split into categories	Ratio Change in Revenue – Museums and Heritage	Continuous, Non-Normal Could be split into categories	Spearman's Correlation Chi-Square Test

How has LA governance and management of LAMs changed?	Museum Type in 2007	Categorical	Museum Type in 2015	Categorical	Visual Statistics
	Changes Y/N	Categorical	Number of Museums	Categorical	Chi-Square Test
	Changes Y/N	Categorical	Partners	Categorical	Chi-Square Test
	Ratio Change in Revenue – Museums and Heritage	Continuous, Non-Normal Could be split into categories	Changes Y/N	Categorical	Kruskal-Wallis Test Chi-Square Test
Do LA characteristics such as type of LA and region affect change in governance?	Partners	Categorical	Region	Categorical	Visual Statistics Chi-Square Test
	Closures Y/N	Categorical	Region	Categorical	Visual Statistics Chi-Square Test
	Governance Changes Y/N	Categorical	Region	Categorical	Visual Statistics Chi-Square Test
	To Trust Y/N	Categorical	Region	Categorical	Visual Statistics Chi-Square Test
	Partners	Categorical	Class	Categorical	Visual Statistics Chi-Square Test

	Closures Y/N	Categorical	Class	Categorical	Visual Statistics Chi-Square Test
	Governance Changes Y/N	Categorical	Class	Categorical	Visual Statistics Chi-Square Test
	To Trust Y/N	Categorical	Class	Categorical	Visual Statistics Chi-Square Test

## Appendix Two: Interview Guide

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I undertook semi-structured interviews in Phase Three. I developed a set of questions and prompts based on topics I identified through my literature review and through Phase One and Phase Two. However, I used this as a guide rather than strict instructions for each interview, allowing the interviewee to describe topics that they thought were important. The guide that I took to each interview is below. As described in SECTION 5.3.4, and ensuring the ethics of the research as per accepted UCL standards (UCL, 2016), the full transcription of each interview is not included in this thesis for the protection of the interviewees.

### Introduction

7. Please describe your role here at the museum?

### Management and Operations

8. What can you tell me about the impact of austerity on the museum?
  - a. Can you describe any changes to your role due to the funding cuts?
  - b. What are you doing differently at the museum due to the funding cuts?
  - c. Prompts: collections, activities, staffing etc.

### Values and Aims

9. What value do you think the museum has?
  - a. Prompt: what does it offer and to whom; what is its purpose; why is it important?
10. Do you think its value has changed due to the funding cuts? How?
11. Have the aims and objectives of the museum changed due to the funding cuts?
12. How do you measure performance?
  - a. Have you changed the way you measure performance due to the funding cuts?
  - b. Have you seen any improvement or decline in performance?

### Stakeholders

13. How are decisions made about the museum?
  - a. Who makes them?



- b. What is the process?
14. Tell me about the museum's relationship with the local authority.
- a. Has it changed?
  - b. What impact does it have?
15. Tell me about the museum's relationship with local people
- a. Has it changed?
  - b. What impact does it have?
16. Who else does the museum have relationships with
- a. Prompt: ACE, HLF, funders, partners
  - b. Have they changed?
  - c. What impact do they have?

#### Evaluation

17. How successful do you think the response to the funding cuts here has been?
18. Do you have any personal aims for the museum?
19. Do you think there is anything that the museum should have done differently in responding to the funding cuts? If so, what?

#### Wrap Up

20. Is there anything we haven't covered that you think is important?

## Appendix Three: FOI Responses

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This section contains the financial information provided by each LA in response to my FOI request.

The LGFS figures provide information on expenditure on museums and heritage services, but this includes more than just expenditure on the museums directly governed and managed by the LA, but other expenditure related to museums, galleries and heritage services as well. To gain a more accurate picture of expenditure specifically on the sampled LAMs I sent an FOI request to each LA, asking for a summary of expenditure on and income from the specific museums from 2007-2008 to present. Each FOI request was worded as follows:

Please can I have a report of the annual expenditure and income for X Museum(s) from 2007/2008 to present?

Information was presented in a variety of different forms and in many cases it was necessary to extract the pertinent figures from a large spreadsheet or report. These formats were not suitable for presentation here, and therefore the extracted data is presented. The presented data has not been adjusted for inflation.

The data provided is limited in itself. An LA is entitled to refuse the request if it will cost too much, likely in terms of staff time, to respond. Nottingham City Council, for example, refused the request as the information was archived and would take an unacceptable amount of time to compile. Secondly, LAs responded with expenditure in differing categories and with differing levels of detail. Some LAs provided gross and net expenditure, whereas the nature of the figures were unclear in some cases. For example, in some cases a headline figure for expenditure was reported without a detailed breakdown, so the figure may have included both revenue and capital. I decided not to go back to the LAs for clarification as the detail needed to make the information comparable was not be appropriate for an FOI request. Rather, detailed one-on-one discussions would be necessary, which were not possible with the resources of this project.

## Bath and North East Somerset Council

Bath and North East Somerset Council provided annual reports for Heritage Services, from which the information below was extracted.

**Table 62: Financial Information for Bath Heritage Services Provided by Bath and North East Somerset Council (000s)**

		<b>2007- 2008</b>	<b>2008- 2009</b>	<b>2009- 2010</b>	<b>2010- 2011</b>	<b>2011- 2012</b>	<b>2012- 2013</b>	<b>2013- 2014</b>	<b>2014- 2015</b>	<b>2015- 2016</b>
<b>Income</b>	<b>Admissions</b>	-£6,710	-£7,046	-£7,780	-£8,604	-£9,489	-£9,053	-£10,474	-£11,104	-£11,976
	<b>Retail and Other Sales</b>	-£1,676	-£1,652	-£1,663	-£1,877	-£1,873	-£1,793	-£1,984	-£2,043	-£2,128
	<b>Room Hire</b>	-£548	-£599	-£589	-£568	-£495	-£423	-£474	-£490	-£527
	<b>Catering</b>	-£435	-£450	-£447	-£527	-£537	-£620	-£687	-£715	-£746
	<b>Other Income</b>	-£765	-£631	-£524	-£495	-£554	-£392	-£602	-£683	-£591
	<b>Total Income</b>	<b>-£10,134</b>	<b>-£10,378</b>	<b>-£11,003</b>	<b>-£12,071</b>	<b>-£12,948</b>	<b>-£12,281</b>	<b>-£14,221</b>	<b>-£15,035</b>	<b>-£15,968</b>
<b>Expenditure</b>	<b>Employee Costs</b>	£2,704	£2,826	£2,965	£3,012	£2,974	£3,101	£3,309	£3,597	£3,797
	<b>Premises and Transport</b>	£790	£860	£748	£885	£997	£1,154	£1,223	£1,232	£1,327
	<b>Merchandise for Re-sale</b>	£808	£771	£777	£877	£885	£828	£932	£928	£965
	<b>Supplies and Services</b>	£876	£895	£949	£806	£910	£817	£1,005	£1,196	£1,334

	<b>Revenue Re-investment</b>	£514	£402	£707	£551	£675	£475	£493	£506	£492
	<b>Building Maintenance</b>	£437	£528	£520	£618	£669	£522	£637	£739	£763
	<b>Agency and Contracted Services</b>	£304	£309	£395	£404	£400	£377	£401	£388	£553
	<b>Voluntary Sector Support</b>	£68	£32	£39	£22	£23	£3	£11	£5	£10
	<b>Finance and Debt Charges</b>		£69	£150	£285	£339	£383	£430	£526	£546
	<b>Insurance</b>				£211	£215	£223	£230	£240	£243
	<b>Contribution to Capital</b>				£312					
	<b>Total Expenditure</b>	<b>£6,501</b>	<b>£6,692</b>	<b>£7,250</b>	<b>£7,983</b>	<b>£8,087</b>	<b>£7,883</b>	<b>£8,671</b>	<b>£9,357</b>	<b>£10,030</b>
<b>Overheads</b>	<b>Internal Overheads</b>	-£776	-£1,902	-£1,933	-£1,847	-£1,789	-£1,798	-£2,401	-£2,657	-£2,918
	<b>Internal Income</b>	£1,237	£1,333	£1,381	£1,266	£1,256	£1,267	£2,027	£2,272	£2,496
<b>Surplus</b>		£3,101	£3,118	£3,201	£3,507	£4,328	£3,867	£5,176	£5,293	£5,516

## Birmingham City Council

**Table 63: Financial Information for Birmingham Museums and Heritage Services, prior to the creation of Birmingham Museums Trust (000s)**

	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012
<b>Gross expenditure</b>	13026	10,497	10638	10159	10058
<b>Gross income</b>	2997	687	700	741	2001
<b>Net expenditure</b>	10029	9810	9938	9418	8057

**Table 64: Financial information for Birmingham Museums Trust (000s)**

		2012-2013	2013-2014	2014-2015	2015-2016	2016-2017
<b>Income</b>	<b>Restricted Funds</b>	-£4,180	-£2,362	-£3,327	-£2,891	-£2,559
	<b>Major Partner Museums</b>		-£1,684	-£1,634	-£1,008	-£1,008
	<b>Renaissance</b>	-£1,685				
	<b>Trading Activities of Subsidiary Undertaking</b>	-£2,067	-£2,039	-£1,961	-£2,083	-£1,973
	<b>Visitors Admission and Outreach Income</b>	-£1,946	-£1,875	-£1,948	-£2,048	-£2,069
	<b>Birmingham City Council Fees</b>	-£4,303	-£4,083	-£4,033	-£3,433	-£3,183
	<b>Other Income</b>	-£847	-£875	-£337	-£1412	-£108

	<b>Total Income</b>	<b>-£15,028</b>	<b>-£12,918</b>	<b>-£13,240</b>	<b>-£12,875</b>	<b>-£10,900</b>
<b>Expenditure</b>	<b>Staff Costs</b>	£5,677	£6,547	£5,811	£5,418	£5,329
	<b>Marketing</b>	£431	£380	£360	£330	£293
	<b>Maintenance</b>	£641	£600	£497	£316	£289
	<b>Finance and Administration</b>	£281	£434	£264	£224	£172
	<b>Professional Fees</b>	£101	£281	£30	£72	£64
	<b>Other Expenditure</b>	£5,196	£4,423	£4,957	£4,354	£4,654
	<b>Depreciation</b>	£271	£630	£828	£942	£831
	<b>Interest</b>	£64	£65			
	<b>Pension Fund Charges</b>			£87	£203	£178
	<b>Total Expenditure</b>	<b>£12,662</b>	<b>£13,360</b>	<b>£12,834</b>	<b>£11,859</b>	<b>£11,810</b>

## Blackpool Borough Council

**Table 65: Financial Information for the Grundy Art Gallery Provided by Blackpool Borough Council**

	<b>2007-2008</b>	<b>2008-2009</b>	<b>2009-2010</b>	<b>2010-2011</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>	<b>2014-2015</b>	<b>2015-2016</b>	<b>2016-2017</b>
<b>Expenditure</b>	£226,346	£235,382	£206,032	£230,984	£251,601	£266,678	£236,818	£225,975	£316,168	£415,067
<b>Income</b>	-£49,252	-£63,424	-£41,298	-£54,851	-£74,126	-£95,637	-£56,500	-£57,213	-£137,067	-£212,520
<b>Net Cost</b>	<b>£275,598</b>	<b>£298,806</b>	<b>£247,330</b>	<b>£285,835</b>	<b>£325,727</b>	<b>£362,315</b>	<b>£293,318</b>	<b>£283,188</b>	<b>£453,235</b>	<b>£627,587</b>

## Cambridgeshire County Council

**Table 66: Financial Information for the Cromwell Museum Provided by Cambridgeshire County Council**

		2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015
<b>Expenditure</b>	<b>Staffing</b>	£34,639	£36,763	£36,850	£35,275	£34,449	£34,703	£38,566	£28,057
	<b>Other Expenditure</b>	£19,086	£18,495	£26,316	£26,783	£15,754	£9,715	£15,461	£10,658
	<b>Total Expenditure</b>	<b>£53,725</b>	<b>£55,258</b>	<b>£63,166</b>	<b>£62,059</b>	<b>£50,203</b>	<b>£44,417</b>	<b>£54,026</b>	<b>£38,715</b>
<b>Income</b>	<b>Education</b>	-£60	-£268	-£3		-£277	-£576	-£3,094	-£220
	<b>Publications</b>	-£3,313	-£4,941	-£2,894	-£3,248	-£3,536	-£3,039	-£3,539	-£4,251
	<b>Donations</b>	-£1,834	-£2,313	-£1,983	-£2,014	-£1	-£2,799	-£5,705	-£4,625
	<b>Other</b>	-£1,085	-£867	-£4,732	-£7,551	-£2,622	-£1,663	-£449	-£11,199
	<b>Internal Income (Capital, Recharges)</b>						-£1,920	-£50,000	-£5,410
	<b>Reprographic Rights</b>		-£130			-£143	-£529	-£183	-£660
	<b>Rent</b>	-£1,092	-£962	-£1,168	-£1,401	-£1,028	-£1,149	-£1,250	-£1,250
	<b>Total Income</b>	<b>-£7,384</b>	<b>-£9,481</b>	<b>-£10,780</b>	<b>-£14,214</b>	<b>-£7,607</b>	<b>-£11,675</b>	<b>-£64,220</b>	<b>-£27,615</b>



<b>Net Expenditure</b>	<b>£46,341</b>	<b>£45,777</b>	<b>£52,387</b>	<b>£47,844</b>	<b>£42,597</b>	<b>£32,742</b>	<b>-£10,194</b>	<b>£11,100</b>
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## Dartford Borough Council

**Table 67: Financial Information for Dartford Museum Provided by Dartford Borough Council**

	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015
<b>Expenditure</b>	£87,420	£89,760	£91,120	£90,400	£91,980	£51,220	£53,610	£49,290
<b>Income</b>	-£700	-£700	-£700	-£700	-£700	-£640	-£1,100	-£1,350
<b>Net Expenditure</b>	<b>£86,720</b>	<b>£89,060</b>	<b>£90,420</b>	<b>£89,700</b>	<b>£91,280</b>	<b>£50,580</b>	<b>£52,510</b>	<b>£47,940</b>

## Doncaster Metropolitan Borough Council

**Table 68: Financial information for Doncaster Museum and Art Gallery and Cusworth Hall Museum and Park Provided by Doncaster Metropolitan Borough Council**

		2007- 2008	2008- 2009	2009- 2010	2010- 2011	2011- 2012	2012- 2013	2013- 2014	2014- 2015	2015- 2016	2016- 2017
<b>Expenditure</b>	<b>Cusworth Hall</b>	£500,708	£506,348	£524,196	£482,049	£438,326	£619,114	£581,590	£493,527	£191,331	£209,059
	<b>Chequer Road Museum</b>	£706,830	£833,736	£672,592	£646,593	£583,962	£456,687	£540,531	£437,932	£305,958	£254,778
	<b>Grand Funded Projects</b>			£13,491	£24,345	£11,118	£235,222	£115,672	£40,470	£172,270	£115,606
	<b>Corporate Recharges</b>	£514,465	£535,608	£448,873	£443,741	£462,352	£416,523	£621,544	£659,720	£663,402	£731,627
	<b>Museum Education Service</b>	£154,258	£154,687	£168,377	£159,183	£169,490	£166,159	£125,144	£124,754	£112,574	£133,226
	<b>Salary Costs (merged from 15/16)</b>									£471,151	£506,686

	<b>Total Expenditure</b>	<b>£1,876,261</b>	<b>£2,030,378</b>	<b>£1,827,528</b>	<b>£1,755,911</b>	<b>£1,665,249</b>	<b>£1,893,705</b>	<b>£1,984,481</b>	<b>£1,756,402</b>	<b>£1,916,686</b>	<b>£1,954,805</b>
<b>Income</b>	<b>Cusworth Hall</b>	-£71,975	- £104,611	-£86,243	-£91,803	- £140,068	- £106,850	- £109,218	- £101,203	- £106,727	- £103,500
	<b>Chequer Road Museum</b>	-£35,432	- £106,398	-£42,777	-£43,524	-£43,407	-£42,981	-£59,516	-£65,351	-£31,333	-£66,608
	<b>Grand Funded Projects</b>			£13,491	-£10,835	-£6,559	- £163,316	-£87,498	-£37,568	- £158,479	- £123,302
	<b>Museum Education Service</b>	- £147,853	- £152,286	- £146,867	- £151,475	- £162,456	- £139,943	- £114,321	- £114,453	- £111,780	- £109,113
	<b>Total Income</b>	- £255,260	- £363,294	- £289,377	- £297,637	- £352,490	- £453,090	- £370,553	- £318,574	- £408,319	- £406,346
<b>Net expenditure</b>	<b>£1,621,001</b>	<b>£1,667,084</b>	<b>£1,538,151</b>	<b>£1,458,273</b>	<b>£1,312,759</b>	<b>£1,440,615</b>	<b>£1,613,928</b>	<b>£1,437,828</b>	<b>£1,508,368</b>	<b>£1,548,459</b>	

## Elmbridge Borough Council

**Table 69: Financial Information for Elmbridge Museum Provided by Elmbridge Borough Council**

	<b>2007-2008</b>	<b>2008-2009</b>	<b>2009-2010</b>	<b>2010-2011</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>	<b>2014-2015</b>
<b>Staffing Costs</b>	£158,010	£146,140	£132,451	£133,665	£145,087	£142,553	£148,289	£183,667
<b>Premises Expenditure</b>	£33,609	£37,641	£25,609	£24,940	£32,850	£30,067	£30,177	£34,191
<b>Supplies/Services Expenditure</b>	£27,228	£40,233	£43,632	£36,788	£24,153	£30,898	£50,625	£43,365
<b>Third Party Payments</b>	£2,616	£2,669	£2,742	£2,800	£2,800	£2,900	£2,900	£2,987
<b>Directorate Support</b>	£950	£1,170	£740	£684	£768	£804	£864	£729
<b>Directorate Administration</b>	£6,222	£6,142	£4,519	£4,275	£4,976	£5,524	£4,769	£4,248
<b>Direct Office Expenses</b>	£3,610	£3,848	£2,340	£1,989	£2,472	£2,884	£2,733	£2,573
<b>Central Support Costs</b>	£34,519	£26,131	£30,149	£28,139	£37,369	£45,496	£41,462	£43,937
<b>Total Expenditure</b>	<b>£266,764</b>	<b>£263,975</b>	<b>£242,182</b>	<b>£233,282</b>	<b>£250,474</b>	<b>£261,126</b>	<b>£281,819</b>	<b>£315,697</b>

## Epping Forest District Council

**Table 70: Financial Information for Epping Forest District Museum Provided by Epping Forest District Council**

	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017
<b>Expenditure</b>	£401,190	£419,650	£410,143	£412,000	£410,720	£434,100	£437,860	£445,700	£491,620	£510,420
<b>Capital Expenditure</b>	£8,484							£631,845	£1,531,000	£63,581

## Ipswich Borough Council

In this case the FOI request was sent to Colchester Borough Council, the lead LA for CIMS.

**Table 71: Financial Information for Colchester and Ipswich Museums Service Provided by Colchester Borough Council**

		2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015
<b>Expenditure</b>	<b>Employees</b>	£1,847,480	£2,075,837	£2,079,858	£2,142,050	£2,051,079	£2,030,119	£1,713,710	£1,740,615
	<b>Other Operating Costs</b>	£1,221,875	£1,376,069	£1,275,579	£1,570,246	£1,659,781	£1,171,461	£1,110,761	£1,098,299
	<b>Total Expenditure</b>	<b>£3,069,355</b>	<b>£3,451,906</b>	<b>£3,355,437</b>	<b>£3,712,296</b>	<b>£3,710,860</b>	<b>£3,201,580</b>	<b>£2,824,471</b>	<b>£2,838,914</b>
<b>Income</b>	<b>Government Grant</b>	-£806,327	-£837,182	-£886,446	-£1,058,839	-£941,467	-£736,645	-£366,934	-£405,039
	<b>Other Grants &amp; Reimbursements</b>	-£63,075	-£70,985	-£27,240	-£273,700	-£233,048	-£31,679	-£370,966	-£206,047
	<b>Customer &amp; Client Receipts</b>	-£530,049	-£662,187	-£533,315	-£571,410	-£606,929	-£549,370	-£148,232	-£698,391
	<b>Income - Internal Fees &amp; Charges</b>	-£4,354	-£2,375	-£780					

	<b>Other Income</b>					-£37,820			
	<b>Total Income</b>	<b>-£1,403,805</b>	<b>-£1,572,729</b>	<b>-£1,447,781</b>	<b>-£1,903,949</b>	<b>-£1,819,264</b>	<b>-£1,317,694</b>	<b>-£886,132</b>	<b>-£1,309,477</b>
<b>Net Expenditure</b>		<b>£1,665,550</b>	<b>£1,879,177</b>	<b>£1,907,656</b>	<b>£1,808,347</b>	<b>£1,891,596</b>	<b>£1,883,886</b>	<b>£1,938,339</b>	<b>£1,529,437</b>



## Leicester City Council

**Table 72: Financial Information for Leicester Museums Provided by Leicester City Council**

	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017
<b>Expenditure</b>	£2,884,600	£3,416,600	£3,350,800	£3,229,100	£2,802,100	£3,049,600	£3,087,700	£3,152,700	£3,255,500	£3,265,100
<b>Income</b>	-£398,700	-£394,900	-£343,200	-£368,900	-£394,000	-£421,100	-£398,700	-£387,800	-£412,800	-£413,700
<b>Net Expenditure</b>	<b>£2,486,000</b>	<b>£3,021,700</b>	<b>£3,007,600</b>	<b>£2,860,100</b>	<b>£2,408,100</b>	<b>£2,628,500</b>	<b>£2,689,000</b>	<b>£2,764,900</b>	<b>£2,842,700</b>	<b>£2,851,400</b>

## London Borough of Hackney

**Table 73: Financial Information for Hackney Museum Provided by Hackney Council**

	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016
<b>Expenditure</b>	£499,176	£485,694	£511,449	£576,358	£569,481	£572,052	£482,322	£484,136	£445,731

## London Borough of Waltham Forest

**Table 74: Financial Information for the William Morris Gallery and Vestry House Museum Provided by Waltham Forest Council**

		2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017
<b>Expenditure</b>	<b>Employees/Staffing Costs</b>	£629,187	£632,843	£501,113	£358,259	£326,029	£296,232	£412,223	£355,273
	<b>Non Staffing Costs</b>	£3,531	£2,249	£2,159	£6,757	£142,729	£493	£174,409	£112,396
	<b>Vestry House Museum</b>	£133,973	£121,501	£128,316	£114,386	£112,852	£112,651	£102,689	£143,130
	<b>William Morris Gallery</b>	£173,892	£526,396	£250,201	£512,308	£3,437,138	£502,503	£546,995	£483,776
	<b>Total Expenditure</b>	<b>£940,583</b>	<b>£1,282,989</b>	<b>£881,789</b>	<b>£991,710</b>	<b>£4,018,748</b>	<b>£911,879</b>	<b>£1,236,317</b>	<b>£1,094,575</b>
<b>Income</b>	<b>Vestry House Income</b>	-£24,595	-£22,560	-£29,300	-£22,584	-£25,559	-£58,569	-£53,756	-£56,295
	<b>William Morris Income</b>	-£43,699	-£64,120	-£58,085	-£254,460	-£519,703	-£379,925	-£386,036	-£417,729
	<b>Total Income</b>	<b>-£68,294</b>	<b>-£86,680</b>	<b>-£87,386</b>	<b>-£277,044</b>	<b>-£545,262</b>	<b>-£438,494</b>	<b>-£439,791</b>	<b>-£474,024</b>
<b>Net Cost</b>	<b>£872,289</b>	<b>£1,196,309</b>	<b>£794,404</b>	<b>£714,666</b>	<b>£3,473,486</b>	<b>£473,385</b>	<b>£796,525</b>	<b>£620,551</b>	

## Newcastle-Upon-Tyne City Council

Financial information for TWAM was extracted from the annual reports available of the TWAM website (Tyne & Wear Archives & Museums, 2011c, 2012d, 2013c, 2014b).

**Table 75: Financial Information for TWAM Extract from Publically Available Annual Reports and Accounts (000s)**

	LA	2007- 2008	2008- 2009	2009- 2010	2010- 2011	2011- 2012	2012- 2013	2013- 2014	2014- 2015
<b>Expenditure</b>	<b>Employees</b>	£6,529	£6,888	£8,733	£8,130	£7,982	£7,087	£6,299	£6,250
	<b>Running Costs</b>	£6,046	£7,002	£6,647	£8,231	£4,991	£4,368	£3,542	£3,544
	<b>Trading Activity</b>	£1,195	£1,081	£1,044	£966	£891	£860	£580	£614
	<b>Total Expenditure</b>	<b>£13,770</b>	<b>£14,971</b>	<b>£16,424</b>	<b>£17,327</b>	<b>£13,864</b>	<b>£12,315</b>	<b>£10,421</b>	<b>£10,408</b>
<b>Income</b>	<b>Gateshead</b>	-£430	-£455	-£614	-£545	-£536	-£409	-£347	-£298
	<b>Newcastle</b>	-£2,104	-£2,120	-£3,117	-£2,413	-£2,298	-£2,121	-£1,759	-£1,673
	<b>North Tyneside</b>	-£673	-£683	-£847	-£778	-£734	-£660	-£572	-£479
	<b>South Tyneside</b>	-£767	-£778	-£944	-£783	-£731	-£538	-£497	-£478
	<b>Sunderland</b>	-£1,412	-£1,445	-£1,731	-£1,531	-£1,452	-£1,324	-£145	-£115
	<b>Newcastle University</b>	-£218	-£467	-£614	-£720	-£659	-£730	-£887	-£968

<b>MLA Renaissance</b>	-£2,549	-£2,187	-£2,082	-£2,185	-£1,888			
<b>DCMS Grant-in-Aid</b>	-£1,796	-£2,206	-£2,436	-£3,699	-£1,918			
<b>ACE</b>						-£3,797	-£3,727	-£3,692
<b>Other Grants and Contributions</b>	-£2,331	-£2,923	-£2,198	-£2,945	-£1,597	-£1,144	-£969	-£1,210
<b>Trading Activity</b>	-£1,430	-£1,340	-£1,309	-£1,170	-£1,244	-£1,060	-£1,180	-£1,280
<b>Other Income</b>	-£456	-£519	-£412	-£363	-£385	-£319	-£293	-£264
<b>Total Income</b>	<b>-£14,166</b>	<b>-£15,123</b>	<b>-£16,304</b>	<b>-£17,132</b>	<b>-£13,442</b>	<b>-£12,102</b>	<b>-£10,376</b>	<b>-£10,457</b>

## **Nottingham City Council**

Nottingham City Council declined to respond to the FOI request due to the time it would take to collate the information.

## St Albans City and District Council

**Table 76: Financial Information for Verulamium Museum and the Museum of St Albans Provided by St Albans City and District Council**

	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017
<b>Verulamium</b>	£264,212	£316,722	£354,324	£781,602	£473,201	£367,957	£372,177	£351,089
<b>Museum</b>	£110,989	£146,555	£128,458	£67,246	£162,310	£139,441	£119,247	£1,592,989
<b>Total Expenditure</b>	<b>£375,201</b>	<b>£463,277</b>	<b>£482,782</b>	<b>£848,849</b>	<b>£635,511</b>	<b>£507,398</b>	<b>£491,423</b>	<b>£1,944,078</b>

## Uttlesford District Council

**Table 77: Financial Information for Saffron Walden Museum Provided by Uttlesford District Council**

	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016
<b>Direct Expenditure</b>	£265,000	£279,000	£274,000	£238,934	£307,430	£237,035	£242,177	£207,905	£202,377
<b>Direct Income</b>	-£31,000	-£37,000	-£22,000	-£37,058	-£63,021	-£48,725	-£64,553	-£48,942	-£33,448
<b>Internal Recharges</b>				£83,783	£98,381	£85,581	£95,183	£97,709	£82,920
<b>Capital Charges</b>					£10,480	£10,480	£11,530	£11,560	£98,478
<b>Net Expenditure</b>	<b>£234,000</b>	<b>£242,000</b>	<b>£252,000</b>	<b>£285,659</b>	<b>£353,270</b>	<b>£284,331</b>	<b>£284,337</b>	<b>£268,232</b>	<b>£350,327</b>



## Warwick District Council

Table 78: Financial Information for Leamington Spa Art Gallery and Museum Provided by Warwick District Council

		2007- 2008	2008- 2009	2009- 2010	2010- 2011	2011- 2012	2012-2013	2013- 2014	2014-2015	2015-2016
<b>Direct Expenditure</b>	<b>Employees</b>	£287,408	£295,221	£286,302	£297,739	£298,028	£303,106	£315,259	£301,116	£334,414
	<b>Premises</b>	£254,576	£289,094	£278,179	£230,853	£246,534	£352,280	£201,372	£238,085	£196,777
	<b>Transport</b>	£1,683	£2,449	£1,752	£1,430	£4,121	£2,227	£1,909	£1,310	£2,208
	<b>Supplies &amp; Services</b>	£179,233	£169,756	£152,375	£190,785	£143,833	£168,843	£97,956	£162,377	£144,246
	<b>3rd Party Payments</b>	£3,105	£1,058	-£13,979	£1,021	£5,109	£1,350	£0	£2,450	£545
	<b>Total Direct Expenditure</b>	<b>£726,005</b>	<b>£757,578</b>	<b>£704,629</b>	<b>£721,828</b>	<b>£697,625</b>	<b>£827,806</b>	<b>£616,496</b>	<b>£705,338</b>	<b>£678,190</b>
<b>Direct Income</b>	<b>Grants</b>	-£56,476	-£38,665	£18,321	-£115,023	-£38,672	-£77,136	-£18,167	-£36,541	-£33,533
	<b>Sales</b>				-£23,351	-£4,294	-£4,990	-£5,250	-£6,389	-£6,234
	<b>Other Income</b>	-£4,792	-£3,539	-£17,464	£0	-£1,112	-£1,806	-£2,056	-£3,460	-£2,590
	<b>Fees &amp; Charges</b>	-£22,840	-£25,730	-£24,052	-£24,888	-£19,733	-£23	£0	-£70	-£3,662
	<b>Rents</b>	-£118,181	-£120,303	-£121,465	-£101,361	-£92,540	-£67,821	-£95,224	-£54,002	-£70,336

	<b>Total Direct Income</b>	<b>-£202,289</b>	<b>-£188,237</b>	<b>-£144,660</b>	<b>-£264,623</b>	<b>-£156,351</b>	<b>-£151,776</b>	<b>-£120,697</b>	<b>-£100,462</b>	<b>-£116,355</b>
<b>Net Direct Expenditure</b>		<b>£523,716</b>	<b>£569,341</b>	<b>£559,969</b>	<b>£457,205</b>	<b>£541,274</b>	<b>£676,030</b>	<b>£495,799</b>	<b>£604,876</b>	<b>£561,835</b>
	<b>Support Services</b>	£158,747	£192,940	£171,181	£167,756	£189,709	£188,648	£184,396	£153,821	£178,285
	<b>Capital charges</b>	£86,699	£86,699	£133,590	£92,554	£94,893	£282,389	£99,981	£1,120,056	£965,144
	<b>Recharges</b>	-£300	-£301	-£400	-£400	-£5,100	-£2,600	-£2,800	-£2,700	-£2,700
<b>Net Expenditure</b>		<b>£768,862</b>	<b>£848,679</b>	<b>£864,340</b>	<b>£717,115</b>	<b>£820,776</b>	<b>£1,144,467</b>	<b>£777,376</b>	<b>£1,876,053</b>	<b>£1,702,564</b>

## Welwyn Hatfield Council

**Table 79: Financial Information for Welwyn Hatfield Museums Service Provided by Welwyn Hatfield Council**

	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016
<b>Expenditure</b>	£406,329	£427,722	£515,008	£489,061	£399,202	£391,982	£384,022	£384,899	£368,834

## Worcestershire County Council

**Table 80: Financial Information for Museums Worcestershire Provided by Worcestershire County Council**

		2010-2011	2011-2012	2012-2013	2013-2014
<b>Expenditure</b>	<b>Employees</b>	£964,598	£884,907	£958,990	£1,027,902
	<b>Premises</b>	£191,488	£175,036	£181,685	£171,160
	<b>Transport</b>	£16,726	£17,469	£16,580	£16,298
	<b>Other Expenditure</b>	£240,264	£312,897	£289,840	£518,963
	<b>Total Expenditure</b>	<b>£1,413,076</b>	<b>£1,390,309</b>	<b>£1,447,095</b>	<b>£1,734,323</b>
<b>Income</b>	<b>Income</b>	-£395,373	-£462,740	-£430,439	-£636,526
	<b>Worcester City Council</b>	-£544,793	-£545,769	-£545,946	-£523,554
<b>Reserve Movement</b>		£17,000	£59,166	-£26,091	-£131,774
<b>Net Expenditure for Worcestershire County Council</b>		<b>£489,910</b>	<b>£440,966</b>	<b>£444,620</b>	<b>£442,470</b>

## Appendix Four: Visitor Numbers

**Table 81: Visitor Numbers from the Visit Britain Annual Survey of Visits to Visitor Attractions**

LA/Service	Attraction	2008	2009	2010	2011	2012	2013	2014	2015	% Change between 2010 and 2015
<b>Bath Heritage Services</b>	<b>Fashion Museum</b>	93,631	90,331	116,235	134,989	118,943	98,591	93,978	90,880	78%
	<b>Victoria Art Gallery</b>	117,419	106,773	114,724	110,500	103,275	94,417	90,636	132,015	115%
	<b>Roman Baths</b>	834,742	882,144	905,751	975,096	919,072	996,143	1,015,135	1,044,802	115%
<b>Birmingham Museums Trust</b>	<b>Aston hall</b>		52,273	54,654	59,229	32,763	40,456	37,409		
	<b>Blakesley Hall</b>	23,897	22,577	24,031	18,931	17,149	19,943	16,653	18,557	77%
	<b>Soho House</b>	17,188	20,604	12,908	7,790	8,499	9,905	9,956	11,982	93%
	<b>Weoley Castle</b>			5,189	1,706	7,449	6,221	8,262	5,205	100%
	<b>Sarehole Mill</b>	19,539	20,495	20,781	17,267	14,723	18,458	19,651	22,734	109%
	<b>Birmingham Museum and Art Gallery</b>	579,577	644,259	729,231	585,144	631,696	580,931	696,488	909,935	125%
	<b>Museum of the Jewellery Quarter</b>				28,855	28,230	30,212	30,076	25,416	

	<b>Thinktank</b>				197,704	185,796	256,251	257,077	261,181	
<b>Blackpool</b>	<b>Grundy Art Gallery</b>									
<b>Cambridges hire</b>	<b>Cromwell Museum</b>	12,480	11,496	9,841	11,081	10,785	8,807	9,247		
<b>CIMS</b>	<b>The Hollytrees Museum</b>	43,687	39,480	40,326	33,829					
	<b>Colchester Castle</b>	107,500	86,141	88,488	87,512					
	<b>The Natural History Museum</b>							26,151	26,752	
	<b>Christchurch Mansion</b>	46,359	67,706	60,515	60,065			45,740	59,132	98%
	<b>Ipswich Museum</b>				48,700			35,430	45,007	
<b>Dartford</b>	<b>Dartford Borough Museum</b>	8,620	7,920	8,112	7,441	5,359	4,841	4,761	4,293	53%
<b>Doncaster</b>	<b>Doncaster Museum and Art Gallery</b>									
	<b>Cusworth Hall Museum and Park</b>									

<b>Elmbridge</b>	<b>Elmbridge Museum</b>	5,798	6,991							
<b>Epping Forest</b>	<b>Epping Forest District Museum</b>		11,575	13,129	15,783					
<b>Hackney</b>	<b>Hackney Museum</b>									
<b>Leicester</b>	<b>Abbey Pumping Station</b>		51,031	57,150	47,128	45,724	55,999	54,798	48,225	84%
	<b>Newarke Houses Museum</b>	46,024	43,764	41,751	40,212	37,762	38,202	39,425	44,734	107%
	<b>Jewry Wall Museum</b>	23,917	25,889	25,029	22,025	24,791	24,500	29,220	28,867	115%
	<b>New Walk Museum and Art Gallery</b>	175,579	176,236	159,029	239,287	219,065	201,784	207,224	192,544	121%
	<b>Belgrave Hall</b>	20,765	19,986		16,471	15,288	7,429	10,039	11,477	
	<b>The Guildhall</b>				30,609	44,860	166,941	64,198	78,161	
<b>Nottingham</b>	<b>The Museum of Nottingham life at Brewhouse Yard</b>	50,530	52,491	48,855	33,159					
	<b>Nottingham Castle</b>	276,798	295,635	266,490	170,225	192,367	196,857	216,426	223,864	84%

	<b>Newstead Abbey Historic House and Gardens</b>	73,116	74,484	66,759	55,673	68,835	74,875	81,519	101,289	152%
	<b>Wollaton Hall and Park</b>	248,256	298,153	184,670	175,117	210,312	229,993	287,893	282,990	153%
	<b>Green's Windmill</b>					20,310	23,408	23,750	24,026	
<b>St Albans</b>	<b>The Museum of St Albans</b>		13,000	20,000	18,203	14,819				
	<b>Verulamium Museum</b>									
<b>TWAM</b>	<b>South Shields Museum and Art Gallery</b>	160,331	161,863	196,179	136,585		126,689	123,174	125,973	64%
	<b>Arbeia Roman Fort and Museum</b>	66,851	49,867	48,767	49,292		33,704	31,559	32,289	66%
	<b>Shipleigh Art Gallery</b>	36,762	42,291	36,792	33,700		23,653	26,757	27,630	75%
	<b>Laing Art Gallery</b>	268,977	253,486	280,773	270,031	256,661	226,134	218,879	228,291	81%
	<b>Great North Museum: Hancock</b>		771,252	518,574	475,441		421,410	491,148	486,815	94%



	<b>Segedunum Roman Fort, Baths and Museum</b>	46,438	40,038	53,794	49,098		49,407	49,320	52,025	97%
	<b>Discovery Museum</b>	462,868	449,883	420,837	417,229	430,499	401,540	434,203	411,695	98%
	<b>Stephenson Railway Museum</b>	33,249	21,934	23,085	24,552		37,211	37,894	44,457	193%
	<b>Hatton Gallery</b>				23,630		28,163	36,361	29,489	
<b>Uttlesford</b>	<b>Saffron Walden museum</b>	17,551	16,459	17,088	15,771	15,805	18,038	15,081		
<b>Warwick</b>	<b>Leamington Spa Art Gallery and Museum</b>									
<b>Welwyn Hatfield</b>	<b>Mill Green Museum and Mill</b>	17,967	19,979	20,726	13,210	15,660				
	<b>Welwyn Roman Baths</b>	6,416	4,964	6,900	5,484					
<b>Museums Worcestershire</b>	<b>The County Museum at Hartlebury Castle</b>	25,240	27,249	24,913	25,487	25,252				
	<b>Worcester City Art Gallery &amp; Museum</b>	71,300	73,687	69,971	73,348			53,005	60,638	87%

	<b>Commandery</b>									
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## Appendix Five: Glossary of Organisations Discussed in the Thesis

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ACE - Arts Council England - a non-departmental public body responsible for supporting and promoting arts and culture. A primary mechanism for support is through the distribution of grants ACE became responsible for supporting Museums in 2010 after the abolition of the MLA.

AMC - Area Museum Council – following a trial in 1959, AMCs were founded in the 1960s with finance from the central government. They were designed to support local museums, by giving grants, providing central services, and regional forums for knowledge exchange.

CUKT - Carnegie United Kingdom Trust – founded in 1913 with the aim of improving the well-being of people in the UK, CUKT has provided funds and support to a number of arts and museum projects over time.

DCLG - Department for Communities and Local Government – a key responsibility of DCLG is to support the provision of public services to local communities. DCLG provides grants to local authorities.

DCMS - Department for Culture, Media and Sport – the role of DCMS is to support and promote culture, art, and heritage in the UK. DCMS funds ACE and other related public bodies.

HLF - Heritage Lottery Fund – the HLF distributes national lottery funding to heritage projects across the UK, including to museums. The national lottery was founded in 1994.

LGA - Local Government Association – the LGA is a membership organisation supporting local authorities across the UK by providing a united voice for authorities in national forums, providing practical support and training, publishing guidance and resources, and enabling knowledge exchange.

MA - Museums Association – The MA is a membership organisation supporting museums and galleries, including local authority museums, primarily in the UK. It advocates for museums and museum standards nationally, provides knowledge exchange opportunities for museums, and provides training.

MGC - Museums and Galleries Commission – The Standing Commission of Museums and Galleries (below) was renamed the Museum and Galleries Commission in 1981. It

was given additional responsibilities, ran grant schemes, and the museum registration scheme, but remained responsible for providing advice and guidance to museums and about museums.

MLA - Museums Libraries and Archives Council – The MLA replaced the MGC in 2000. It also incorporated the Library and Information Commission (LIC). The MLA was a non-departmental public body responsible for museums, galleries, libraries, and archives. It was supposed to provide leadership in these sectors, advise the government, conduct research on best practice, and manage professional standards.

NLGN - New Local Government Network – a thinktank and membership organisation, advocating for social impact of local government through research, knowledge exchange, and lobbying.

NMDC - National Museums Directors Council – a membership organisation for national and large regional museums. It advocates for these museums, presenting evidence of their impact, and provides a forum for knowledge exchange.

RCNMG - Royal Commission on National Museums and Galleries – Established in 1927 to produce a public enquiry into the costs, value, governance and management of museums, with a focus on national museums.

SCMG - Standing Commission on Museums and Galleries – Founded in 1931 based on the recommendations of the RCNMG. The Standing Commission's role was to advise on museum issues, encourage development and promote co-operation between national and provincial museums