

# **Detailed Business Case**

## **Future of the Heritage Service**

**Project: Future of the Heritage Service**

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## Glossary

<b>BBMF</b>	<b>BATTLE OF BRITAIN MEMORIAL FLIGHT</b>
<b>DBC</b>	<b>DETAILED BUSINESS CASE</b>
<b>EU</b>	<b>EUROPEAN UNION</b>
<b>FE</b>	<b>FURTHER EDUCATION</b>
<b>GOH</b>	<b>GAINSBOROUGH OLD HALL</b>
<b>GLLEP</b>	<b>GREATER LINCOLNSHIRE LOCAL ENTERPRISE PARTNERSHIP</b>
<b>HE</b>	<b>HIGHER EDUCATION</b>
<b>HLF</b>	<b>HERITAGE LOTTERY FUND</b>
<b>LCC</b>	<b>LINCOLNSHIRE COUNTY COUNCIL</b>
<b>MLL</b>	<b>MUSEUM OF LINCOLNSHIRE LIFE</b>
<b>LOV</b>	<b>LINCOLN ONE VENUES</b>
<b>OBC</b>	<b>OUTLINE BUSINESS CASE</b>
<b>OJEU</b>	<b>OFFICIAL JOURNEY EUROPEAN UNION</b>

## 1. Executive Summary

The Council has been exploring ways of reducing the costs of its Heritage Service whilst improving and enhancing its public offer, including the potential redevelopment of Lincolnshire Archives, which is covered by a separate Executive Report. The aim is to reduce the overall net cost of operating the Heritage Service to a point where the service is self-sustaining. To achieve this, the Heritage Service will need to identify and explore future models of service delivery.

A significant risk to these objectives is ensuring that the financial model for the Heritage Service is both realistic and achievable. This means not only ensuring that the service operates under the right model of service delivery, but also ensuring it has a cohesive business model going forward. The business model will describe the rationale of how the Heritage Service creates, delivers and captures value, in economic, social, cultural or other contexts, and this will form part of the service's business strategy. The business model will also be used for a broad range of informal and formal descriptions to represent core aspects of the 'business' including purpose, business process, target customers, offerings, strategies, infrastructure, organisational structure, sourcing, trading practices, and operational processes and policies including culture, in other words ***Heritage Means Business***.

This Detailed Business Case describes the Heritage Service and its collections, their current use, the drivers for change, the options considered and the potential deliverable outcomes. It outlines how this will be achieved by 2018 and lists two options for the future and explores the recommended option in more detail.

The Service objectives are:

- **Strategic** – understanding the need of stakeholders, being aware of the wider context within which we operate
- **Sustainability** – long term viability that will endure, developed income streams, commercially aware, with the right skills and political and community support
- **Innovative** – creative teams and managers, use of technology, governance, audience development and relationships
- **Proactive** – seeks out and generates opportunities, acquisitive and developing rather than reacting
- **Relevant** – for today's stakeholders and for the future
- **Accessible** - historical and cultural heritage collections provide local people and visitors with a sense of context and inspiration about where they live and visit, greater emphasis upon interaction and engagement
- **Collaborative** – greater partnerships, cross-departmental; cross boundary; cross institution; cross community
- **Respected** – a unique resource which supports the identity of the individual, the community, the region and the nation.

In considering these options, it is essential to understand the financial backdrop to this work. In November 2015, Lincolnshire County Council announced that the financial task facing the Council was daunting in that there was a requirement to cut annual spending by at least £130m over the next four years, which required some tough choices about local services.

The challenge set for the Heritage Service therefore is to save its current £1.8m operations budget and for the service to become self-sustainable by 1<sup>st</sup> April 2018. Not included in this saving is the £0.5m operating budget for Lincolnshire Archives, an element of which is a statutory service.

This new model of service delivery has been designed to fundamentally transform the way in which Heritage Services are developed and provided within the County, and makes significant progress towards reducing the level of the County Council subsidy required in order to keep the sites open and available to the public, whilst generating economic and tourism activity for the City and County. However, it would be prudent for the Heritage Service to remain in its current configuration until there is a greater certainty that a modified service can be proven to run cost effectively, and allow for greater opportunity to research thoroughly the governance, structure, legality, and operating models available, including for example Trust Status.

## **2. Context**

Lincolnshire is a unique and culturally vibrant place in which to live and work. The Heritage Service plays a crucial role in tackling social exclusion, contributing to regeneration, to promoting safer communities, encouraging healthier lifestyles, providing opportunities for voluntary and community activity and stimulating lifelong learning. The Heritage sector has a significant role to play in achieving this aspiration, by providing inspiring, engaging and educational experiences, promoting a sense of place for all who visit, live and work in Lincolnshire and contributing to Lincolnshire's economic development.

Lincolnshire has a strong sense of place and its museums and heritage sites play an important part in helping residents and visitors alike to understand the deep roots of its cultural identity and its traditions. Our heritage sites act as information hubs, and venues for permanent and temporary exhibitions also provide international insights, access to a wide range of cultures and enable us to showcase Lincolnshire on a national and International stage. These sites play a significant role in contributing to Lincolnshire's overall social and economic well-being. The impact of the recession and the reduction in public funds make it imperative that our museum and heritage sites continue to develop new ways of working, seek out new partnerships and explore innovative methods to generate income.

Indeed, the heritage sector in Lincolnshire is a diverse patchwork of historic sites and museums. The sector is predominantly represented by locally run volunteer led organisations, with groups such as Heritage Lincolnshire and the Lincolnshire Heritage Forum providing essential supporting network for the Sector. The Heritage Sector is also a key part of the visitor economy, which itself is worth more than £1 billion a year to Lincolnshire, and employing 39,000 people. The visitor economy is one of the most important growth sectors for the region.

Within this, Lincolnshire County Council operates some of the key heritage attractions and museums in the County. When Lincolnshire County Council came into being on 1 April 1974 it assumed responsibility for a number of heritage related properties and services which had previously been the responsibility of other organisations. This included Lincolnshire Archives and Lincoln Castle. Next to join were the Usher Gallery and City and County Museum, which had both previously been operated by Lincoln Borough, now City Council. The formerly independent Museum of Lincolnshire Life was soon added together with windmills in Lincoln (Ellis), Burgh-le-Marsh, Alford and Heckington. Church Farm Museum in Skegness was developed as a "sister" museum to the Museum of Lincolnshire Life in 1976, but was subsequently transferred to be a community run facility in 2010.

In 1984 the museum at Grantham and Stamford became part of the service. However in 2010, the operation of Grantham Museum was transferred to the Grantham Community Heritage Association (GCHA), whilst Stamford Museum closed and was replaced by

Discover Stamford, which was opened within Stamford Library; with Lincolnshire County Council retaining the operation of the Stamford museum store at the rear of the museum.

A new archives building was developed on Friar's Lane in 1991 along with a new archaeological store and conservation department. In 1985 the Battle of Britain Memorial Flight Visitor Centre was developed as a unique partnership with the Royal Air Force at RAF Coningsby. This provided visitors with guided tours of the hangar housing the aircraft of the Memorial Flight. The Visitor Centre was redeveloped in 2001 and enhanced with a new entrance in 2008 and in 2016 a refurbished Café area, and dedicated flexible educational space.

The Collection Art and Archaeology was developed between 1996 and 2005. This development amalgamated the previously separate Usher Gallery with the City and County Museum sites through the creation of a new purpose-built museum building 'The Collection', adjacent to the Usher Gallery in Danesgate.

Finally, in 2015 saw the reopening of Lincoln Castle after a major refurbishment with success that exceeded all expectations of the Lincoln Castle Revealed project. With the building and development programme at the Heritage Skills Centre, proximity of the Cathedral and the Museum of Lincolnshire Life, Lincoln Castle Revealed has delivered a product that means visitors see uphill Lincoln as a collection of treasures, 'recognised as glories' and a 'must see'.

In 2009 a Fundamental Service Reviews was undertaken on the Heritage Service. The outcomes of this provided the basis for the restructuring of the Heritage Service, including the closure and subsequent transfer of the sites listed above in 2010. It also provided a roadmap for service delivery up until 2013. Perhaps the most far reaching outcome of this work was the creation of the new and hugely popular website [www.lincstothePast.com](http://www.lincstothePast.com), launched in the spring of 2011 which brought together publicly searchable databases for the museums, libraries, archives and Lincolnshire's sites and monuments record.

In 2013, the Museums, Libraries, Archives & Heritage Strategy 2013–18 was developed, which acknowledged the progress made since 2009, and provided a fresh set of strategic priorities that linked directly back to those generated in 2009. These were:

- **Realising self-sustainability and resilience**; maximising the profitability of trading activities or earning enough income through fundraising and developing strong and realistic business plans.
- **Forging sustainable and useful partnerships** – within our local communities and across the public and commercial sectors. This meant delivering outcomes for other organisations by either directly delivering or facilitating through the sites and services offered.
- **Inspiring and engaging more people** – and a wider range of people, with our services and collections – giving our visitors and non-visitors what they want and developing new activities which will encourage them to visit and return on a regular basis, whilst also creating a sense of place and helping deliver social cohesion. This also meant creating a Public Events and Exhibitions Programme that delivered high engagement as well as high quality.
- **Developing the workforce** – of staff and volunteers so that they remain flexible, motivated and skilled.
- **Delivering an increased profile** – for the cultural heritage of Lincolnshire. This meant effective development and promotion of the county's key sites, including for example promoting the Aviation Heritage in the County, and capitalising on marketing opportunities.

However, in order to meet the challenge set by the Council of becoming a self-sustainable Heritage Service by 1<sup>st</sup> April 2018, it has been necessary to review that strategy, and in

particular to consider the Heritage Sector of Lincolnshire as a whole, in order to determine what impact and influence the Heritage Service can have with regards to demonstrating **Excellence** and providing a **Leadership** role.

In June 2016, the Heritage Service held a number of Staff Engagement Workshops. One of the activities was to complete a SWOT analysis of the service and the proposed model of service delivery. A summary of this is shown in figure 1 below:



Figure 1

### 3. LCC Strategic Background

#### 3.1 Commissioning

LCC's Commissioning strategies include the following which are relevant to this project:

- Community resilience and assets
- Sustaining and developing Prosperity through Infrastructure
- Sustaining and growing business and the economy
- How we do our business

#### Community Resilience and Assets

Within FY 2015/16 a survey of our visitors shows that 42.5% of visitors to our Heritage sites lived within Lincolnshire, with 77.2% of people living within a 50 mile travel distance. Of these, 97.1% of visitors felt our sites offered Very Good/Good *Value for Money*, and after taking everything into account including displays, refreshments, cleanliness of site, and friendliness of staff etc., 96.9% rated their visit as Very Good/Good. In most cases, the main reasons given to visit a heritage site were recorded as '*General visit to see the site*' (45.6%), whilst 29.9% of visitors came to see a particular exhibition or event with on average 35% of visitors visiting a site more than once.

In essence being able to access Heritage facilitates a sense of pride in their home county amongst local people who live here. Local people bring visiting family and friends to visit the sites to show them Lincolnshire's history. Access to heritage gives people a sense of identity and their place in the world through cultural identity and a sense of the place they



live/come from. The Heritage Services itself facilitates the provision of information to local history researchers who use it to create talks and lectures for the local community, which then provides knowledge and information to the community about their local history.

A key priority for the Heritage Service has been skills preservation, and provides access to tools and research about dying crafts and skills such as tapestry, slating etc. many of which are unique to Lincolnshire. Without the preservation of these tools and knowledge, this would be lost.

It has created a wide range of loans boxes and handling objects that can be used by residents in care homes, with feedback about the health and wellbeing benefits that they obtained including helping those with dementia to remember things, helping them with their social skills, communication skills, and mental activity and manual dexterity. This is supported at sites such as the Battle of Britain Memorial Flight Visitor Centre, which allows the sharing of recent memories, and has become a place of pilgrimage and international commemoration of the victims of conflict. This allows for intergenerational communication between parents, children and grandparents who are regularly observed sharing memories and stories in galleries, provoked by the objects they see – conversations that would not otherwise have taken place.

The Heritage Service also provides a **Leadership** role within the wider Heritage Sector, and offers professional advice and guidance to community and voluntary groups including Heritage Lottery Funded community projects and local history research projects. This helps bring communities together, and create community cohesion through identity and shared research.

Without doubt there are also significant volunteering opportunities for individuals and groups within the Heritage Service – all of whom enhance our service delivery and provide opportunities for skills learning, self-esteem, and mental wellbeing, and also provide a sense of belonging to an organisation and a sense of pride in their work. Volunteers gain a great deal of personal interest and satisfaction from access to heritage and historic objects in the course of their work, as this is a passion for many of them. The Heritage Service also provides access to cultural activities and cultural skills such as drawing and art appreciation, allowing people to develop cultural awareness and develops people as individuals and facilitates growth intellectually and emotionally. The Heritage Volunteering Strategy, 2016-19, aims to increase the service's capacity to become sustainable, through volunteer-led projects, heritage volunteering leadership in the county, building partnerships and supporting community and health priorities. The strategy reviews roles and tasks to increase the engagement opportunities in all aspects of the operations and to provide volunteers with the tools to become more involved in the community and work place.

The Heritage Service provides the opportunity for Lincolnshire citizens to access heritage and culture easily and locally, which is extremely important. Access to knowledge, education and learning locally is vital for the continued growth of skills and education in Lincolnshire, particularly for those within the a population without access to the educational benefits of culture in their local area who cannot easily afford to travel to long distances to National museums or facilities in other Counties but would benefit from access to local culture and arts.

Preservation of the collections is the key to preservation of the cultural and historic identity of Lincolnshire, which is what makes the County unique and special, and gives people a sense of place, a sense of pride and a sense of belonging. Without preserving the actual cultural artefacts that reflect its history, the County will become culturally poorer in the future, and unable to justify itself as a centre for history and culture.

The Heritage Service is also working in partnership with the University of Lincoln, particularly around academic research, and currently the service receives numerous academic enquiries ranging from specialist costume historians from America to

archaeological PHD students, to local history researchers, family history researchers and school children. Indeed access to information via objects for academic research is particularly important, as the study of the collections by academics enables new knowledge to be gained and the past to be better understood. Indeed if Lincolnshire's cultural artefacts are not available to be studied in the future, the county will miss out on the chance to make new discoveries about its history and to take part in and contribute to these academic advances.

The ability to increase volunteering and enhance access to and use of the Heritage Service is recommended as criteria for assessing potential future models of operation.

*Sustaining and developing Prosperity through Infrastructure.*

In FY 2014/15, £60,000 has been drawn down by the Archives and digital income. There is the potential for this to increase through digitisation work, lectures and developing schemes to encourage donations. In FY 2015/16 £98,100 has been drawn down in grant funding from Heritage Lottery Fund (HLF) for the Siemens Ruston and Hornsby Project and £44,013 has been drawn down from the National Cataloguing Grant Scheme for the Rolling the World Project

In FY 2015/16 received two Government grants awards through Arts council England. These were an Aviation Heritage Grant of £98,772 and for the National Portfolio (Exhibitions) of £71,000, and it is anticipated that these will continue in some form or another in future years. Furthermore, there will be a £425,000 grant over 5 years from 2018 onwards for the Heritage skills centre, as part of their Skills for the Future programme, which will be delivered in partnership with the Heritage Lincolnshire Trust. Also from 2018, it is anticipated that the service receive between £7,000 – 20,000 per year for 5 years from the Cathedral Partnership Grant.

The ability to increase grant funding is recommended as criteria for assessing potential future models of operation.

*Sustaining and growing business and the economy*

In FY 2015/16 the Heritage Service received 580,517 visitors to its sites. This included the re-opening of Lincoln Castle, and is an 187,193 increase on the previous year. There was also a significant increase in interactions on the previous year (enquiries from the public, website hits and outreach etc), with the service recording over 5m interactions for the first time.

It is also important to note that the Heritage Service has a significant Economic Impact on Lincolnshire. Utilising the tool kit developed as part of the Economic Value of the Independent Museum Sector report delivered by DC Research in 2010, on behalf of the Association of Independent Museums and supported by the Museums Libraries and Archives Council, it is estimated that the Heritage Service currently contributes £12m to the local economy, based on the current cost of the Heritage Service (including Lincolnshire Archives) of approximately £2.3m.

The recommended option requests approval for the Heritage Service to remain a part of Lincolnshire County Council for at least a two-year period in order to allow it to effect necessary cultural and organisational change and consider other suitable models of service delivery. Alongside this, it would be preferable for the Heritage Service to retain any surplus income it generates between 2015 and 2018, with this reinvested directly back into the Service. The result will be that the economic impact of the Heritage Service will be maintained (if not increased), whilst there will be no direct costs to the County Council from 2018 onwards.

The potential increase to the economic impact on this by any future development is recommended as a criterion for assessing potential future models of operation.

### 3.2 Organisational Strategy

LCC's Organisational Strategy 2012-2015, as confirmed on 9 December 2012, identifies five key elements to the authority's purpose. The first of these is:

“Making the best use of all of our resources”

In line with the Fundamental Service Board discussions on the future of the Heritage Service, it is noted that this Board perceives that the County Council should be a facilitator, rather than a direct deliverer, of heritage services making the best use of all of our resources within a commissioning framework to deliver value for money and efficient service delivery.

## 4. **Wider Strategies**

### 4.1 Greater Lincolnshire Local Enterprise Partnership (GLLEP)

A key priority for the Greater Lincolnshire Local Enterprise Partnership (GLLEP) is driving the growth of the area's three defining and strongest sectors to offer the most competitive advantage. These 3 sectors include agri-food, manufacturing and the visitor economy:

"Our visitor economy is worth over £1.3 billion per annum to the Greater Lincolnshire economy, supports over 39,000 jobs and has long-term growth potential; more than 22 million people visited Greater Lincolnshire's world-class visitor attractions in 2012, including Lincoln Castle and Cathedral, the Lincolnshire Wolds and the vibrant coastal resorts of Cleethorpe, Mablethorpe and Skegness – the UK's fourth most popular holiday resort."

To do this, the GLLEP Strategic Economic Plan proposes to:

"work in partnership with public and private sector partners to extend the network of visitor attractions across Greater Lincolnshire, building on our diverse heritage and landscape assets."

The Heritage Service is already working in partnership with a number of organisations and groups to deliver excellent heritage offer for the citizens of Lincolnshire. There is scope for further development or expansion of these within the next few years, and the opportunity to take advantage of fresh initiatives that are imminent:

- New Arts Council England National Portfolio Organisation criteria. The Collection currently has NPO status and funding from ACE which provides the delivery of a significant contemporary and modern art programme. The revised guidelines for 2018 – 2021 will incorporate the exploration and exploitation of more specifically historic and heritage themes within the programme and these will potentially allow for a wider and populist audience base to be expanded.
- The Heritage Service already has a Memorandum of Understanding (MOU) with the University of Lincoln around the development of the Archives Service, particularly around the development of digital archiving, and an existing project connected to the Ruston and Hornsby holdings. Further development of the engineering, industrial and technological themes fits naturally with the wider aspirations of the University.
- The Tennyson Collection owned by Lincolnshire County Council and delivered in partnership with the Tennyson Society is currently through to the second stage of achieving Designated Status from the Arts Council. Attaining this status and

working in partnership with both Universities will put the Heritage Service and the City on the international map.

- Cathedral Connected forms the natural extension to the work of Lincoln Castle Revealed. The Heritage Service will work in full partnership with the Cathedral to achieve the aims and outcomes of the initiative, providing expertise and support in relation to developing the intellectual offer and visitor experience along with plans for a joint extensive learning, education and development programme.
- The Heritage Skills Centre will not only provide a strong supporting element to the Cathedral Connected project, but in itself will be exponentially expanding its offer and impact in the next few years, reaching out not only on a commercial basis, but fully playing a role in the development of the post 16 education and traineeships.
- Lincolnshire County Council provides the core funding for the Aviation Heritage Partnership, and the expansion and development of this strand of the heritage service will be an increasing priority, both in facilitating other organisations to develop their offer, but providing a central point of expertise and promotion for the entire aviation heritage offer for the county. The heritage Service has taken a lead in helping to develop a Lincolnshire Aviation Strategy as part of a multi-agency group.
- Heritage Lincolnshire is a strong and successful organisation that provides a range of complementary heritage services for the County of Lincolnshire. The Heritage Service will continue to support and work in collaboration with Heritage Lincolnshire, especially in the area of planning archaeology, alongside the Historic Environment arm of the County Council

#### 4.2 Joint Health and Wellbeing Strategy

The potential opportunities for widening access to the collections for enhancing people's enjoyment and quality of life will enable the project to deliver against key themes within the Joint Health and Wellbeing Strategy (2012 – 2018), specifically:

- Promoting Healthier Lifestyles – such as the current work at The Collection with Addaction and Sense.
- Improve the health and wellbeing of older people – e.g. the current project around the Siemens archive which is looking to involve older volunteers, who are ex-Ruston employees, working with student volunteers from the University of Lincoln to develop a digital record of the history of Rustons. Part of this project also looks to engage all volunteers with sharing and developing digital skills, including around social media. Also the development of loans boxes to be used in reminiscence sessions at Care homes.
- Improve health and social outcomes for children and reduce inequalities – e.g. targeted work with Special Schools.

## 5. **Engagement**

### **Executive Councillor:**

Higher Level Management meetings have been held with Cllr Nick Worth, and discussions have included identifying the key benefits of a new service model including:

- Audience development and increased access to priceless collections.
- Capitalisation on potential to enhance services through partnership working/grant funding.
- Development of world class, iconic visitor attractions through integrated development.
- Potential re-interpretation of current sites and identification of key stories to be told

- Development of the Cultural Quarter.
- Enhancement of the visitor economy.
- Increased efficiency (through consolidation of current offer/better use of resources).
- Sustainability and optimisation of income opportunities.

**Staff:**

In June 2016 all Heritage Service staff were invited to participate in discussions about the proposed model of future service delivery, and provide their opinions about potential use of buildings and stories to be told, 'must haves', priorities and outcomes. As well as having an informed opinion as members of the Heritage Service participants views were extremely valuable as also being representative of cross section of citizens and residents of Lincolnshire. Some key points can be extracted:

- ***Use of buildings and stories***

The fact that Lincoln and Lincolnshire's engineering history and story has not been made enough of was a very common comment, alongside links to existing industry and infrastructure in Lincolnshire such as Siemens and the work of the University, and the importance of Science and Technology . This was connected to celebrating and promoting Lincolnshire's influence on the world, and the role of significant Lincolnshire people. Another common theme was the need for a more dynamic and engaging exhibition programme, focused on more popular themes and elements from history. The consolidation of sites and cross theming of material were also seen as important. The importance of military history, Roman History and Medieval History also came through strongly, alongside using big themes and anniversaries to hook audiences.

- ***Must haves***

The need to have a more commercial outlook was universally acknowledged at all sessions with staff, alongside the vital importance of improved marketing and promotion of existing activity. Quality of offer was also referenced, being flexible, relevant, underpinned by an understanding of what the public want and responding to it. The importance of making heritage accessible both physically and intellectually including through outreach was acknowledged, the importance of strong leadership and teamwork, and excellent digital access were all regarded as 'must haves'.

- ***Priorities***

A common and recurring theme that emerged was the need for the Service to be flexible and agile to be able to respond to change. Connected to this was the need for the creative use of spaces at sites, with a more dynamic and changing mix of two and three dimensional material, and stronger audio, visual and digital interpretation and staff interaction. Again digital engagement emerged as a priority theme, providing the opportunity for all residents to recognise themselves in the Service and its offer, effective marketing, and listening to and including the views of the public were all seen as priorities. Effective internal organisation, business planning and pursuing corporate sponsorship were all highlighted. The importance of reaching the wider county beyond Lincoln was also a theme.

- ***Outcomes***

Developing new audiences and creating a quality offer that drives repeat visits were key outcomes identified. Collaboration and partnership between sites and with the wider sector were also viewed as important, and this to extend outside of

Lincolnshire. The importance of viability and sustainability in delivery were underpinning outcomes.

## Stakeholders

A Communications and Engagement Plan has been developed to identify all of the service's key stakeholders, and in particular those who have an interest in any redevelopment of the Heritage Service. A Stakeholder matrix has been completed to ensure the appropriate approach is taken with regards to the engagement for each identified stakeholder, based on their importance and influence. Depending upon the influence the stakeholder has on any potential redevelopment of the Heritage Service and their interest regarding this, the levels of engagement and the communications message provided will alter accordingly.

The main aim of any communication with stakeholders, regardless of their interest and influence, is to provide a consistent message and to promote the opportunities that this redevelopment can bring. The objective is to be open and honest.

During this process, the timeframes and stakeholder matrix will need to be reviewed, to ensure stakeholders are informed of developments at an appropriate time. All stakeholders are to be informed that the Council wishes to redevelop its Heritage Service so that it is both cost effective and fit for purpose. However, the extent and detail of messages thereafter will depend on the stakeholder's involvement with this process.

The illustration at Figure 2 details the different approaches that are to be taken:

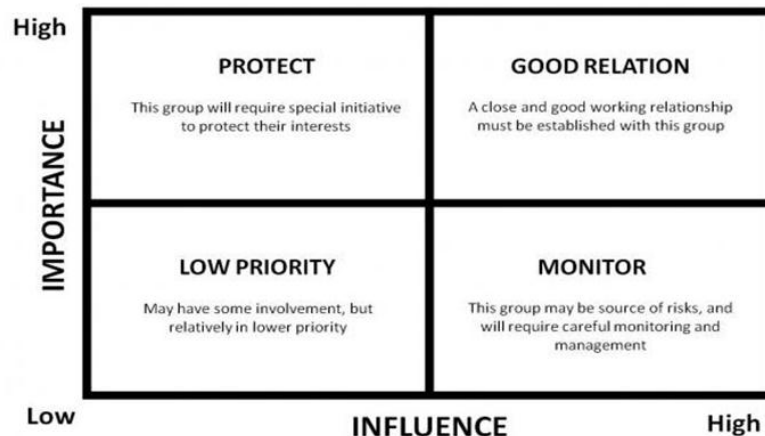


Figure 2

- High

These stakeholders are considered to have a high level of interest and/or influence. It is vital that they are seen to be involved, and wholeheartedly support the proposal. It is essential that they understand why the project is important and what it is seeking to achieve as well as their role in the process. Regular consultation will be required during the whole process, which includes a dialogue so that they can both understand the process and feel they can shape the service or understand when their opinions are not incorporated into the work. Stakeholder messages need to be tailored to the individual stakeholder, and may require face to face communication, whilst gathering and responding to feedback will be important.

- Medium

These stakeholders have a noticeable but not critical level of interest in or influence over the process. Whilst their support is important, it is not vital, so whilst two-way communication is still important, it can be at a less frequent level and with less extensive consultation.

- Low

These stakeholders do not have a direct contribution to make to the process; therefore simply keeping them informed with relevant information is important.

## Legal

- Advice has been sought from LCC Legal Services on potential future governance models for the Heritage Service.

## 6. Potential Funders - See Appendix A.

It is probable that funding will in particular be sought from European Union (EU) sources, although the referendum decision for the United Kingdom to leave the EU (Brexit) leaves a great deal of uncertainty. It is clear that currently the UK government does not yet have a plan for negotiating a different relationship with Europe, and that this will clearly be a priority over the next few months. Initial advice is that negotiating an exit from the EU is likely to be long and drawn out. Article 50 of the Lisbon Treaty lays down the process, but quite possibly the negotiation will not begin until early next year. A conclusion to these discussions may not therefore be reached until 2019, and there would be a future date set for when this decision would become legally effective.

Legislation would need to be changed at the UK and European level, so the date when the UK formally separates from the EU in a legal sense is unlikely to be until the 2020s. Until such time as the United Kingdom legally leaves the EU therefore, EU funding should still be available, and we have been advised the following as key within EU funding bids: a key priority is jobs and growth. Other potential areas of interest include: carbon neutrality, community, coproduction and digital access.

Initial advice has also been sought from the HLF, and it is understood that new funding streams are likely to become live shortly, including their new Transition funding 'Resilient Heritage' programme with grants available up to £250,000 to UK organisations that want to achieve significant strategic change in order to become more resilient and sustain improved management of heritage for the long term. This can be through acquiring new skills or knowledge, or new models of governance, leadership, business and income-generation. HLF outcomes are shown in Appendix B.

## 7. Recommended Evaluation Criteria

Drawing on the current SWOT of the Heritage Service, building pressures, Member Engagement and strategic drivers within the County Council and elsewhere, the following are recommended as being key evaluation criteria for the initial options analysis:-

**Key Objectives for the Project**

Objectives	Key Driver, External Funding and Strategic Links	Weighting Suggested
<p><u>1. Financially Efficient and Sustainable</u> (e.g. in build, finance, set up, on- going operations and overall life- cycle)</p>	<p>2 (EU Funding, HLF), 4, 7, 8 Making best use of resources.</p>	<p>30%</p>
<p><u>2. Engaging</u> (e.g. attracts people to access and utilise, encourages and facilities access)</p>	<p>1, 2 (?HLF), 3, 6 Community resilience and assets. Sustaining and developing Prosperity through Infrastructure.</p>	<p>20%</p>
<p><u>3. Growth and Jobs</u></p>	<p>2 (EU Funding), 3 ,5 Community resilience and assets. Sustaining and growing business and the economy.</p>	<p>20%</p>
<p><u>4. Inspirational</u> (e.g. in terms of interpretation, collections, activities, research &amp; development, design, build techniques)</p>	<p>2 (EU Funding), 3 ,5 Community resilience and assets. Sustaining and growing business and the economy.</p>	<p>15%</p>
<p><u>5. Innovative</u> (e.g. at the forefront of cultural activities in terms of governance, joint working, activities, Access, IT....)</p>	<p>1, 2 (EU Funding &amp; HLF), 3 Sustaining and developing Prosperity through Infrastructure.</p>	<p>15%</p>

**Key Drivers**

- Audience development and increased access to priceless collections.
- Capitalisation on potential to enhance services through partnership working/grant funding.
- Development of world class, iconic visitor attractions through integrated development.
- Potential re-interpretation of current sites and identification of key stories to be told
- Development of the Cultural Quarter.
- Enhancement of the visitor economy.
- Increased efficiency (through consolidation of current offer/better use of resources).
- Sustainability and optimisation of income opportunities.



8. Long List of Options – 2013/14

In 2015, the Heritage Service completed an exercise to consider the options for the future of the Heritage Service, and after considering the various advantages and disadvantages placed these in rank order. This is shown in Appendix C.

The options identified are shown in the table below:

	OPTION	RECOMMENDATION
A	Do nothing	Discontinue – full savings will not be made
B	Add the Heritage Service to the Library Service Procurement	Discontinue – Invited Expressions of interest, but none received
C	Set up an LCC controlled Teckal company	Discontinue - LCC would retain control of operations, and determine the service specification. As a purpose built company there would probably be a good strategic fit with the heritage service's mission, aims and objectives. Potential tax and other implications not yet fully understood.
D	Join an existing Teckal Company (e.g. Compass Point)	Discontinue - LCC would have to join the board if the value of the contract was more than 10% of the company's business with its main shareholders. <b>Also</b> Liable for Corporation Tax on accounting profits and Stamp Duty Land Tax – may be payable if freehold/leasehold property is transferred.
E	Collaboration or Joint Venture with the University of Lincoln	Discontinue - May not achieve full budget reductions. It would also potentially put existing grant funding bids at risk e.g. ACE NPO funding. It also separates the ownership of the collections and buildings from their operation
F	Transfer operations to an existing charitable trust	Discontinue - This option would see the externalisation of the Heritage Service to an existing charitably run organisation. Market consideration has not identified any significant market for these services and this option should only follow on from more extensive market engagement/development activity.
G	Form a Community Benefit Society (CBS) with Charitable Status	Discontinue - LCC would not have direct control, but would be the commissioner with observer status on the board. Business plan unproven and as a new organisation no track record, so specialist advice would need to be sought in relation to procurement. Would require specialist legal advice to set up a new organisation.  Relies on central establishment charges (CEC) being re-directed to the service. This would potentially put existing grant funding bids at risk e.g. ACE NPO funding.

		Separates the ownership of the collections and buildings from their operation
H	Form a Charitable Trust and Company Limited by Guarantee (Non-Profit Distributing Organisation)	<p>Discontinue and standalone option, but consider as longer term option. The advantages of this option are:</p> <ul style="list-style-type: none"> <li>• Does not have share capital</li> <li>• Members act as guarantors instead of shareholders Has the ability to enter contracts</li> <li>• Offers 80% relief from Non-Domestic Residential Rates 5% VAT on fuel Access to gift aid (can reclaim £0.25 on every £1 donated by tax payers)</li> <li>• Access to grants from other charities – c£1bn available each year.</li> <li>• LCC determines the service specification and negotiates an acceptable contract price.</li> <li>• Ability to enter into contracts Less reputational damage to LCC than some other options As a purpose built organisation it would have the strongest fit with the heritage service's mission, aims and objectives</li> </ul>
I	Form a Community Interest Company	<p>Discontinue - Business plan unproven and as a new organisation no track record, so specialist advice would need to be sought in relation to procurement. This would potentially put existing grant funding bids at risk e.g. ACE NPO funding.</p> <p>Regulated under company law, but also by the Regulator of Community Interest Companies. Does not have charitable status. Relies on central establishment charges (CEC) being re-directed to the service</p>
J	Form a Commercial Company	<p>Discontinue - Business plan unproven and as a new organisation no track record, so specialist advice would need to be sought in relation to procurement. This would potentially put existing grant funding bids at risk e.g. ACE NPO funding. It would involve procurement issue for the Council in contracting for its existing service.</p>
K	Enter into a joint venture agreement with other authorities	<p>Discontinue - Less LCC control over the outputs and outcomes due to a need to work with other authorities. No 80% relief from Non-Domestic Residential Rates No 5% VAT on fuel No Access to Gift Aid Potentially put existing grant funding bids at risk e.g. ACE NPO funding. Separates the ownership of the collections and buildings</p>

		from their operation
L	Run a Procurement exercise for the Heritage Service	<p>Discontinue - Consultation with TNA and depositors and the <i>custos rotulorum</i> would be required in relation to Lincolnshire Archives.</p> <p>Business plan unproven and as a new organisation no track record, so specialist advice would need to be sought in relation to procurement. This would potentially put existing grant funding bids at risk e.g. ACE NPO funding. Separates the ownership of the collections and buildings from their operation</p>
M	Split the Heritage Service, such that Archives remains in the county Council as part of "enabler strand" along with information governance and the rest spins out	<p>Discontinue - The development of the archives relocation project with integration would be more complex. Potentially more expensive management costs than remaining within the Heritage Service.</p> <p>Partly separates the ownership of the collections and buildings from their operation</p>
N	Split the Heritage Service into its component parts, with different forms of governance above	<p>Discontinue - Some sites may not benefit from 80% relief from Non-Domestic Residential Rates</p> <p>Some sites may not benefit from 5% VAT on fuel</p> <p>Some sites may not benefit from Access to Gift Aid</p> <p>Increased management costs, no economies of scale.</p> <p>This would potentially put existing grant funding bids at risk e.g. ACE NPO funding. Separates the ownership of the collections and buildings from their operation.</p> <p>Reduces ability of sites to work collaboratively within the same service – the whole service approach and any economies of scale would be lost.</p> <p>The ability for service wide delivery of the Heritage Service's mission, aims and objectives would be reduced. Ability to enter contracts not clear.</p>
O	Split the Heritage Service's site based operations from the curatorial functions	<p>Discontinue - Makes management of the collections and sites more complex.</p> <p>Potential increased management costs, no economies of scale. Consultation with TNA depositors and the <i>custos rotulorum</i> would be required in relation to Lincolnshire Archives</p> <p>This would potentially put existing grant funding bids at risk e.g. ACE NPO funding. Separates the ownership of the collections and buildings from their operation.</p>

When considering Options M, N and O, the actual spend within FY 2015/16 and the allocated budgets for each individual site and team were reviewed. These are shown in the table below and shows that out of a budget of £1.8m, a surplus was achieved of £558,620.

Financial elements	2015/16 forecast						2015/16 Actual	2015/16 Budget
	Staff	Premises	Rates	Operational c	Income prof	Other		
<b>Sites</b>								
Castle	739,000	112,000	56,700	467,400	-196,800	100,000	-492,900	233,936
BBMF	73,000	18,000	1,850	32,000	-197,000	43,000	-29,150	-60
MoLL	154,000	31,000	45,500	36,500	-76,000		191,000	230,441
The Collection	340,000	180,500	226,000	23,200	-36,800		732,900	601,803
Collections Care	242,100			5,500			247,600	247,630
Collections access	172,300			4,300			176,600	176,247
Aviation	91,200			26,000	-116,000	52,500	53,700	949
Mills	0	6,400	0	0	-4,500		1,900	1,900
GoH	169,200	24,310	960	59,450	-156,500	-57,700	39,720	25,468
<b>Sites sub total</b>	<b>1,980,800</b>	<b>372,210</b>	<b>331,010</b>	<b>654,350</b>	<b>-255,480</b>	<b>137,800</b>	<b>921,370</b>	<b>1,518,314</b>
<b>other operations</b>								
Senior management	280,000			40,000			320,000	247,298
Non sites/ other				160,000				-51,658
<b>Grand total</b>	<b>2,260,800</b>	<b>372,210</b>	<b>331,010</b>	<b>854,350</b>	<b>-2,554,800</b>	<b>137,800</b>	<b>1,241,370</b>	<b>1,713,954</b>
<b>Required savings</b>								<b>1,800,000</b>

## 9. Analysis and Draft Recommended Options

Appendix C analyses the current long list against the key criteria identified. The recommended options are as follows:

- Option C – Heritage Service to become a trading unit within Lincolnshire County Council, for at least a two-year period. This is in order to allow it to effect necessary cultural and organisational change and consider over a longer term, other suitable models of service delivery, for example Option H. This option will retain a cultural legacy for the people of Lincolnshire, and ensure the Heritage Service continues to support the economy of Lincolnshire, whilst also achieving the required financial savings of the Council by the service becoming self-sustainable.

### Effects of site and service closure

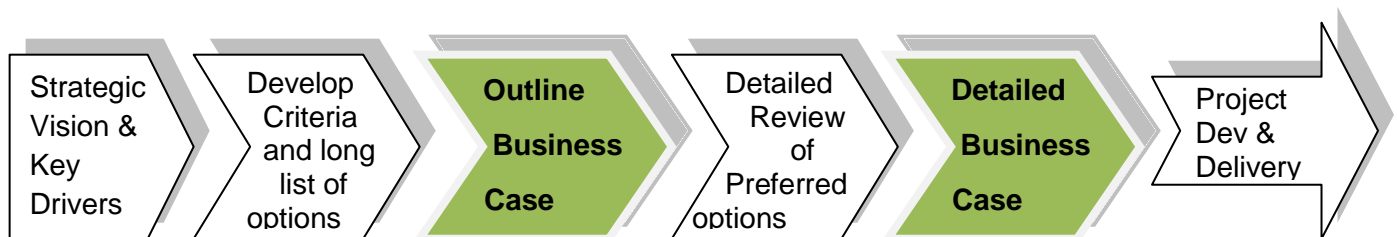
An alternative to pursuing any of the options would be to close all sites and services down completely. Closure of sites would not completely reduce the cost to Lincolnshire County Council for them, as The Collection, The Museum of Lincolnshire Life and of course the Archives house the collections for the County, and there are statutory and legal obligations that the Council must comply with as the responsible owner and recipient of bequests, purchases and donations since 1974, or inherited from other authorities and organisations before then. The County's collections bring a wealth of enjoyment and education to those living in Lincolnshire and beyond. The County is legally obliged to protect significant elements of these collections but, importantly, their management and development ensures that the cultural heritage and life of the County are preserved for future generations and are available to the current generation.

	Gross Saving from closure of the site	Residual cost to LCC of maintaining the asset whilst closed (rates & maintenance)
Gainsborough Old Hall	£25,498	£0

The Collection (Museum and Usher Gallery)	£601,803	£120,000
Museum of Lincolnshire Life	£230,441	£80,000
Battle of Britain Memorial Flight Visitor Centre	-£60,000 (net income)	£0
Lincolnshire Archives	£158,406	£68,000
	£956,148	£268,000

These calculations do not include the Castle or Stamford store, and the income that the Museum of Lincolnshire Life now generates, which is £76,000. Closure of the Castle in particular in revenue terms would lose the Council over £1,000,000 per year, whilst retaining an ongoing maintenance cost of £200,000 per year. This would leave the council with net liabilities of almost half a million pounds with no net benefit being generated for the public for the servicing of this liability.

## 10. Process and Timescales



The process included engaging the Heritage Management Team and other senior Managers in an analysis of the Long List of options shown above. This has generated a short list for the development of this detailed business case. The decision on the preferred option for consultation and development will be presented to Executive in October 2016.

See Appendix D for the current decision making timeline.

## 11. Key assumptions

- LCC wishes to engage with development of key cultural assets to benefit the people of Lincolnshire and engage with a wider user base.
- Willingness of LCC for the Heritage Service to become an independent trading arm of the Council in the short term, and for the service to continue to consider other models of service delivery in the longer term.
- There is a desire for LCC to retain input into the Heritage Service.
- LCC are willing for the Heritage Service to retain all its surplus income generated from 2015 onwards.

## 12. Project Dependencies and Interdependencies

The current uncertainty over the United Kingdom's decision to leave the European Union may limit options available to LCC for the future delivery of the Heritage Service

Dependencies:

- Retention of the Arts Council England's Museums Accreditation, and The National Archives' Archives Service Accreditation
- HLF
- EU funding
- Legal. Legal Services had been engaged

Interdependencies:

- Fundamental Budget Review 2015, where it was noted that a £1.8m saving was being sought from Heritage Services. It was noted that this runs as a parallel project to the Archives Redevelopment project).
- Fundamental Budget Review 2016
- Volunteers
- Key Stakeholders and existing partnerships e.g. RAF Coningsby, English Heritage
- Depositors for Archival Material

### **13. Renaissance and Transformation of the Heritage Service**

The Heritage Service has grown and developed in a semi-structured way for many years, with an over emphasis on delivering to strictly heritage based outcomes and outputs. The emphasis has been a focus on seeking to exceed the requirements of the externally set professional standards and frameworks that govern the Heritage Sector. The latter are absolutely essential for the delivery of a professionally recognised and Accredited Heritage Service, and must be maintained. However, both structuring of the Service internally and its configuration (and target focused approach to working) has created until recently an organisational culture which has prioritised the preservation and conservation needs of Heritage Assets above their actual use. The purpose of sites and collections is to create and enable accessibility; there has been until recently a lack of innovation, creativity and risk taking.

Controlled risk taking within certain parameters is essential for both delivering commercial success in financial terms, and also for creating a nationally and internationally recognised heritage offer. This latter is crucial for creating a service that the citizens of Lincolnshire can be proud of, and more importantly see ways they can be part of and take ownership of. This new model of service delivery has been designed to not only deliver this, it has been designed to fundamentally transform the way in which Heritage Services are developed and provided within the County. The success of Lincoln Castle Revealed provides an innovative and ground-breaking example to be followed for the transformation of the whole Heritage Service.

A crucial requirement for the success of the future Heritage Service in this new model is for it to realign and bind itself to the needs and requirements of the external environment it works within, a key priority being to explore, achieve and exploit greater commercial viability. Practically this requires two things to happen:

- Firstly for partnership and collaboration to be the natural ways of thinking and working in everything that is developed and delivered.
- Secondly, that the views and opinions of visitors, users, stakeholders and the citizens of Lincolnshire need not only to be taken account of and worked to in the shaping of the offer, but this to be ongoing and continual process so that delivery constantly adapts to what the external environment requires of it.

It means not only having accurate processes for capturing and acting on excellent business intelligence, but also the development of smart partnerships with individuals and organisations, and the effective integration of volunteers. It means collaboration and

genuine co-creation of the Heritage Service. To achieve this a significant change within the service is required, to create an organisational culture where openness, innovation, risk taking and working in partnership with a huge spectrum of organisations at all levels of the service is the natural and only way of working.

The new model has been conceived and designed specifically so that:

- Agility and the ability to be flexible are inherent in the fabric of the structure, and in the organisational culture. This is essential so that the Service is able to adapt and flex to respond swiftly to changes in the operating environment and to new opportunities as they arise.
- There is no longer insularity/isolation internally of staff, and with this a similar parochialism about what those working for the Service conceive and think about what the service is delivering. Greater connections with outside organisations will be forged, alongside exposure to, and integration of, best practice from across the county, which can be then fed directly into service delivery in Lincolnshire.
- There is renaissance in thinking towards a less risk averse approach to core business development (including greater commerciality), especially around the use, management and promotion of collections and sites.
- Energy is focused onto delivering wider economic, tourism, social and health outcomes for both the citizens of and visitors to Lincolnshire, away from narrow and straightforward targets around the preservation of the heritage assets.
- The Public Programme (events, exhibitions, community projects and outreach) are joined up and coordinated across the LCC run sites, with this LCC programme of activity both collaboratively developed with partners and stakeholders, based on an evidenced understanding of the appetite/desire from the public for the programme.
- A thorough understanding of what the user/public wants, effective mechanisms for capturing (and then acting on them) what these are (and with this an understanding or knowledge of how they change month to month, year to year), an internal appetite to engage with the public, take on board their views, and meet and exceed their expectations.

#### 14. Proposed future operating model for Heritage Services

There are a finite number of components that come together to create any Heritage Service. These are the 'Heritage Assets' (sites, collections, information about/connected to sites and collections); the audience (visitors, non-visitors, researchers, the wider general public and other stakeholders); and the staffing or facilitators/mediators to providing audience access to the 'assets'. For any Heritage Service to be viable it needs to continually be asking of itself:

- What is sustainable and what is not?
- What can, could or should be made sustainable, and what cannot?
- What is missing or is needed in the future and what is no longer required?

It is not possible to create a viable and sustainable Heritage Service by simply considering how individual sites or functions run in isolation, both from each other, and from the wider Heritage infrastructure they sit within (which is not simply the County of Lincolnshire, but also the heritage sector nationally and internationally). A sound understanding of the dynamic nature of business development is required, and a model required that reflects this dynamism, rather than a model for the Heritage Service that simply considers the current sites as static, independent entities that will not change and have no connection to either each other or the wider heritage infrastructure of Lincolnshire.

The model that has therefore been produced has four elements that capture the active actions of service delivery, which include both the sites and business functions of a Heritage Service:

- Facilitating
- Advising
- Planning
- Support

The primary purpose of the Heritage Service is to maximise physical and intellectual access to the Heritage of Lincolnshire to as wide and diverse an audience as possible, so that this audience (either through participation in, experience of, delivery of, or exposure to Heritage) are enriched or entertained by this experience. To achieve this requires a diverse and varied ways and means of delivering the Heritage experience, be it at sites, thorough digital means, stratified or layered to match the needs of the audience. As can be seen in Figure 3, the proposed model for the Heritage Service is a framework for how the sites will be operated, and the Services that will be provided within the sites and beyond out into the wider heritage sector in Lincolnshire and beyond.



Figure 3

In contrast to the existing model of operation and being mindful of the economic imperative to reduce the reliance upon the public purse, the starting point and end point for all activity will be delivering to the needs of visitors and users of the Heritage Service and its sites, with visitor insight and experience, and customer and user insight being both the primary information sources and drivers for service delivery.

The phenomenal success of the Castle as a result of the Lincoln Castle Revealed project has provided a template for service development and improvement across the Heritage Service. In particular the focus on customer experience and the development of a strong 'brand value' are elements that lie at the very heart of the Castle's existing and ongoing success. The new model for the Service allows for each site and service element to develop its own unique branding and values, but ensuring this is fully integrated within an underlying Heritage Service fabric as shown in Figure 4:

<b>Visitor Experience (FACILITATING)</b>	<b>Research Development (ADVISING)</b>	<b>Audience Development (PLANNING AND PROGRAMMING)</b>	<b>Support and Development (SUPPORTING)</b>
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Visitor Services	Professional Advice	Delivering or Facilitating Outreach and Interpretation	Building Partnerships and Relationships
Retail & Commercial	Site & Collections Development	Major Events and Exhibitions	Support and Acquisition
Physical and Digital Interaction	Interpretation & Research	Education and Learning	Funding/Financial Planning/Modelling
Visitor Insight & Experience	Storage & Access	Customer & User Insight	Hospitality/Income Generation
Sites & Facilities Management	Accreditation	Audience Development (Local - International)	Business Growth/Continuity and Planning
<p><b>CROSS CUTTING AREAS OF WORK:</b> Marketing and Communication; Lincolnshire focused; Accessible to All; Appreciated, Invested, Skilled, Motivated Workforce (including volunteers)</p>			
<p><b>OPERATING VALUES</b> Self-Sustaining, Agile, Flexible Working (both Teams and Processes), Robustly Planned Direction of Travel, Open and Honest Communication (both inside and outside)</p>			

Figure 4

The service structure will be required to change to reflect this integrated way of delivering the Service to the Citizens of Lincolnshire, and servicing the needs of the wider Heritage Sector in Lincolnshire. This also entails the Heritage Service thinking and working in a commercially minded way with other heritage and non-heritage businesses in the County and beyond.

In plain terms in terms of service structuring this means:

- **Visitor Services** – frontline operation of heritage sites, responsibility for quality of visitor experience, on site and the look and feel digitally/remotely, commercial, retail and catering, intelligence gathering on visitors and users. This will also include a well-developed and extensive programme of events and activities.
- **Research Development** – care of sites and collections, storage and access to collections, research and development of sites and collections, development of interpretation of sites and digital platforms. Ensuring compliance with industry standard quality measures such as Archives and Museums Accreditation, but also focus upon the development of research, leadership and innovation. This directly links to the redevelopment of the Archives as an innovative multi-faceted heritage facility in Lincoln.
- **Audience Development** – Events, exhibitions (both temporary and permanent), outreach and on and off site interpretation; adult and school education and learning,

community development, visitor and customer insight and analysis, audience(s) development.

- **Support & Development** – strong financial management, overall staff development and training, focus upon business development and planning, business improvement and expansion, commercial development, fundraising and income generation across sites and services.
- The service will retain at its core, a strong curatorial expertise across the museums and archives service, and in addition, the experience and expertise within project planning, interpretation, digital engagement and fundraising will be expanded and developed such that the Heritage Service will advise, support and collaborate with the wider Heritage Sector locally, nationally and internationally. This element of the model is currently under exploited and through reconfiguring our way of working, and structuring and liberating existing expertise will be crucial for the financial viability of the new Heritage Service.
- For the overtly commercial elements of the Service such as retail, catering and events, there is greater opportunity to work collectively across sites, providing both procurement and economies of scale benefits. Similarly marketing and market research are cross service functions being a crucial pillar within audience development, but located firmly within the Support and Development strand of the model.

## 15. Route map to financial sustainability and independence

Appendix E sets out the key stages and route map for financial independence. The proposed route map sees direct LCC funding of the Heritage Service change from an above the line cost of £2.3 M in 2016 to a surplus of over £341,000 in the 2020 financial year. There are three inextricably interlinked strands for the Heritage Service to become more financially independent that must be delivered:

- Activity to reduce costs and overheads, and increase income 2016 – 2019, as shown below
- Banking of surplus income generated 2015 – 2018 to invest in service development and cover the shortfall in direct LCC revenue funding in the 2018 – 2019 financial year (£759,000)
- Exploration of other governance and financial models to deliver increased efficiency and final cost neutrality from 2019 – 2020 onwards.

A breakdown of the forecast budgets is set out in Figure 5 below:

Financial elements	2015/16 total	2015/16 Budget	2016/17 Budget	2016/17 forecast	2017/18 forecast	2018/19 potential	2019/20 potential
							<i>New Operating Model</i>
Operations	£443,470.00	£1,093,488.00	£453,499.00	£283,520.00	£-10,000.00	£-160,000.00	£-830,000.00
Engagement	£230,300.00	£177,196.00	£368,483.00	£368,483.00	£340,000.00	£350,000.00	£340,000.00
Care & Access	£844,500.00	£786,099.00	£835,137.00	£835,137.00	£755,000.00	£590,000.00	£590,000.00
Senior management	£320,000.00	£247,298.00	£286,428.00	£286,428.00	£295,000.00	£300,000.00	£310,000.00
Development	£0.00	£0.00	£380,298.00	£380,298.00	£350,000.00	£200,000.00	£100,000.00
Non sites/ other	£160,000.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
<b>Grand total</b>	<b>£1,998,270.00</b>	<b>£2,304,081.00</b>	<b>£2,323,845.00</b>	<b>£2,153,866.00</b>	<b>£1,730,000.00</b>	<b>£1,280,000.00</b>	<b>£510,000.00</b>
Heritage (including Archives) Annual Commissioning cost to Lincolnshire County Council*	£-2,323,845.00	£0.00	£-2,323,845.00	£-2,323,845.00	£-2,323,845.00	£-521,000.00	£-521,000.00
Running cost of Heritage (including Archives) if surplus is retained and re-invested	£-325,575.00			£-169,979.00	£-593,845.00	£759,000.00	£-11,000.00
<b>NET SURPLUS</b>	<b>£-325,575.00</b>			<b>£-495,554.00</b>	<b>£-1,089,399.00</b>	<b>£-330,399.00</b>	<b>£-341,399.00</b>

Figure 5

\*Note - £521,000 is the ongoing cost for providing the statutory archives function

Outlined below are the proposed activities that will deliver the necessary reductions in costs and increase income to make up the shortfall from reduced LCC revenue from April 2018 onwards:

**Heritage Service – development and income generation targets 2016 – 2018 and 2018 – 2020**

<b>2016 – 2018</b>		
Museum of Lincolnshire Life	£150,000	Development of retail and catering functions, Elm house and progress with current operational improvement activities.
The Collection	£100,000	Development of a paying programme, lectures, evening events, mixed entry (special events/ exhibitions), weddings, organisational efficiency savings.
The Usher	£100,000	Development of a paying programme, lectures, evening events, mixed entry (special events/ exhibitions), weddings, organisational efficiency savings.
Battle of Britain Memorial Flight	£30,000	Improved in house catering function, and improved educational offer for schools.
Gainsborough Old Hall	£50,000	Complete hospitality face-lift, organisational efficiency savings, Tudor costume and paid evening activity.
Castle	£100,000	Development of Heritage Skills Centre operations, maximising of hospitality opportunities and weddings
Development team & other Professional Services	£100,000	Business development team self-funding activities, through activities such as community fundraising, commissioning out of expertise.
Formal education offer	£30,000	Review of fees and provision
Organisational development	£90,000	Organisational efficiency savings from across the Heritage Service
Fundraising campaign	£100,000	Build buy-in on our heritage cause, operational and capital fundraising strategy towards improvements
Aviation Heritage Partnership	£50,000	Review of fundraising streams, partnerships and efficiencies
<b>Total</b>	<b>£900,000</b>	
<b>2018 – 2020</b>		
Status based	£1,000,000	Charitable status would yield savings of £600,000 on rates and income of c.£400,000 from Gift Aid
Membership scheme	£20,000 - £30,000	
All sites	£100,000	Continued service improvements & efficiencies

## 16. MARKET Analysis

### 16.1 Supply and Demand for heritage in Lincolnshire

All the Heritage sites and museums identified within Lincolnshire are shown in Figure 6 below. From this it can be seen that:

- There are clusters around key urban areas
- Lincolnshire County Council sites sit within these clusters
- There is some lower density of heritage sites and attractions around the coast

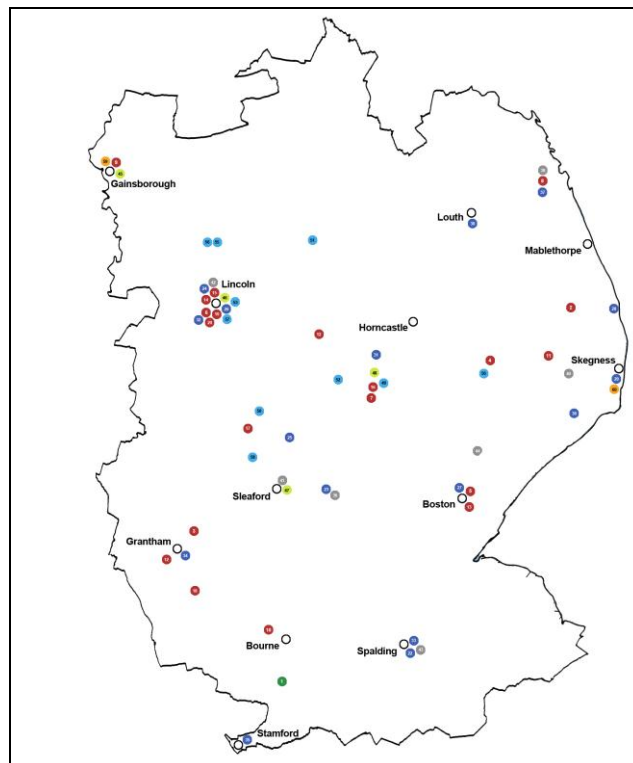


Figure 6

The different types of heritage offer are categorised within Figure 7:

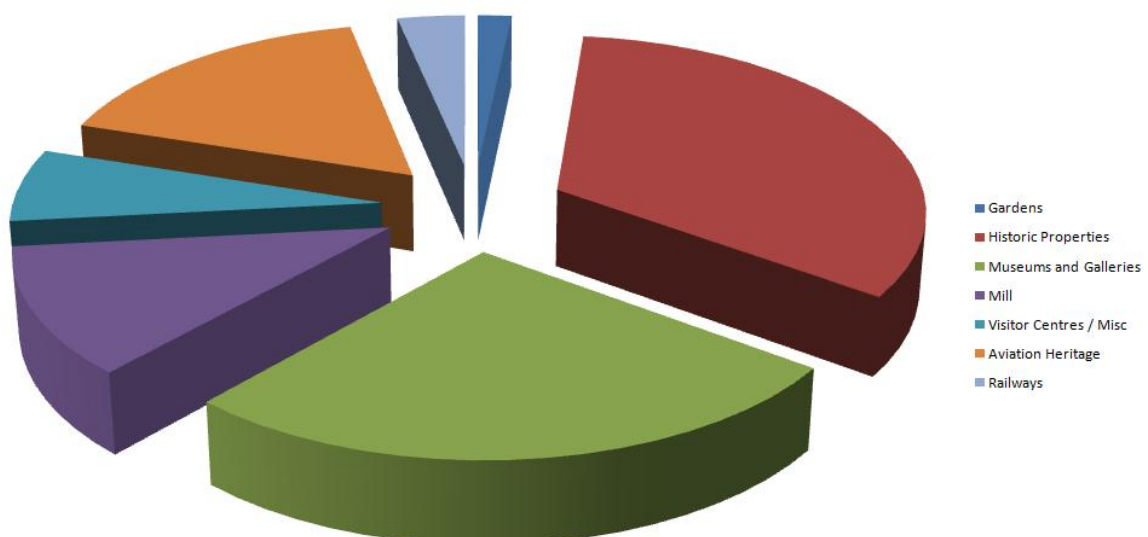


Figure 7

These sites can also be roughly categorised by historical period each majors on as shown in Figure 8:

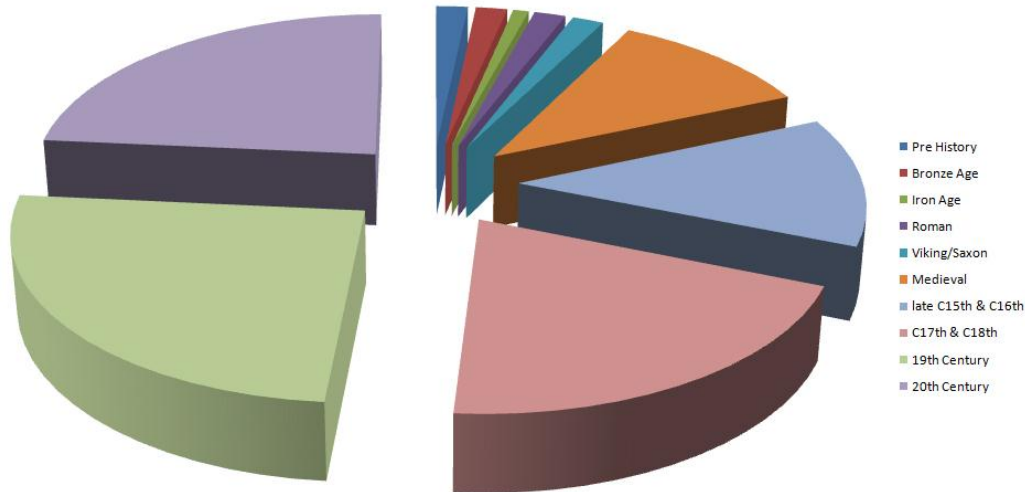


Figure 8

A vast majority of the 20<sup>th</sup> century sites reflect the strong aviation heritage offer of the County, whilst the diminishing number of sites as you go back in time reflects the differential survival of heritage over the years (in simple terms the further back in time material relates to, the less chance it will have of surviving). It is to be expected that there is little represented from prehistory with the offer primarily that of The Collection in Lincoln and Louth museums. A very interesting detail is the relatively small amount of Roman heritage in proportion to the overall whole. However, it must be noted that much that does survive is in Lincoln City. There is a greater spread of medieval – 19<sup>th</sup> Century heritage throughout the County.

The Department of Culture, Media and Sport Taking Part survey 2014/15 recorded that 72.6% of people had visited a heritage site in the previous year based on a sample of 9,817 respondents (this statistic can be triangulated against the findings of the Our Lincolnshire project which identified that nearly 80% of respondents had visited a historic city or town within the last year, 72% a historic building, 65% a historic park or garden, 63% a museum, 62% a ruin such as a castle, 54% a historic place of worship or an industrial heritage site and 43% an archaeological site).

Using the 72.6% statistic above on the number of people within a 90 minute drive time of Lincolnshire gives a potential market for heritage 3,767,111 people. The current repeat visit percentage to LCC heritage offer is 35%. This means there is a vast un-tapped market for the Heritage Service waiting to be drawn to the sites and services within Lincolnshire.

## 16.2 Nature of Visitors to Heritage Attractions

Analysing the data provided by visitor survey forms completed at Lincolnshire County Council heritage sites during 2015/16, it has been determined that 65% of our visitors were first time visits and 35% were repeat visits. We can also see how far people travelled to visit our heritage sites during 2015/16.

*Distance travelled to visit heritage site*

Under 5 miles	20%
5-10 miles	13%
11-30 miles	23%
31-50 miles	15%
Over 50 miles	26%
Overseas	3%

By way of a benchmarking exercise, the following table provides information from Visit England on visitor numbers during 2014 (January to December). These are currently the most up to date figures available.

<b>Attraction</b>	<b>2014 visitors</b>
Alford Five Sailed Windmill & Tea Room	4,237
Ayscoughfee Hall Museum and Gardens	17,602
Battle of Britain Memorial Flight Visitor Centre	35,878
Belton House	319,886
Burgh le Marsh Windmill	12,246
Cranwell Aviation Heritage Centre	4,951
Doddington Hall	20,987
Easton Walled Gardens	15,858
Gainsborough Old Hall	31,618
Grimsthorpe Castle, Park and Gardens	22,504
Gunby Hall	35,554
Harlaxton Manor	1,400
Heckington Village Trust Railway & Heritage Museum	313
Lincoln Castle	136,684
Lincolnshire Archives	7,713
Lincolnshire Coast Light Railway	1,000
Museum Of Lincolnshire Life	78,617
Navigation House	3,291
North Ings Farm Museum	106
Owston Ferry Smithy and Museum	134
RAF Scampton Heritage centre	13,000
Skegness Natureland Seal Sanctuary	107,529
Tattershall Castle	50,532
The Collection and Usher Gallery	148,853
The Old Smithy & Heritage Centre	134
Welbourn Forge	300
Woolsthorpe Manor	42,762

In terms of evidencing ability to appeal to and capture the potential market, Lincoln Castle more than doubled the number of paying visitors following significant investment and reopening in April 2015. In terms of total visitors including non-paying visitors to the grounds, the increase, whilst uncaptured, is significantly higher than double.

Previously, The Collection also more than doubled its free to enter visitors following investment in 2010 and 2011 and the Museum of Lincolnshire Life saw substantial increases following investment.

### 16.3 Audiences

In terms of visiting audiences for heritage sites there is typically a combination of local residents, day visitors to Lincolnshire and educational school party visits. Some will of course be motivated because of a specific interest in a particular site offer, be it for instance aviation heritage, medieval history, or agricultural and industrial machinery. Within this, significant user segments include couples over fifty, families (parents and grandparents) with primary aged school aged children, and tourists. The general visitation pattern for heritage sites matches surrounding counties; school visits fall away during the summer holiday periods, combined with peak day visit tourism activity in July and August, accounting for about a quarter of annual visits, with around three quarters of the annual visitor total coming between April and October. Beyond this core visiting audience activity is related secondary user activity around research, volunteering and outreach, which varies site by site.

### 16.4 Our Lincolnshire

In partnership with the University Of Lincoln, in 2015-15 '*Our Lincolnshire*' (2015-16) was devised as a robust, multi-faceted exploration of the attitudes of residents and visitors in Lincolnshire to the county's heritage and the ways in which they engage with it. The overall project reached in excess of 1% of the population of greater Lincolnshire and observations from the project are considered to have a high degree of validity.

There were four main strands, a conventional survey and three less conventional 'creative' programmes:

- Heritage Survey: a detailed large-scale survey with questions about attitudes to heritage and heritage engagement in Lincolnshire;
- '*My Lincolnshire Collection*': a digital 'web app' enabling users to select favourites from a range of 100 images of Lincolnshire's heritage objects;
- '*Performing Lincolnshire Heritage*': four new local performances co-created and co-produced by members of the public exploring themes chosen by them;
- A case-study focussed on cricket as heritage: exploring attitudes to a traditional cultural activity which would not typically be regarded as 'heritage' by its participants.

When considering the 'use of heritage', adults considered '**contributing to the economy**' the more important, whilst those aged 11 – 18 years old considered that this less important, narrowly favouring '**skills development**' over '**nurturing well-being**'. Indeed 91% of adults and 51% of those aged 11 – 18 years old considered that heritage was important, whilst enjoying, investigating and protecting heritage are seen to be important by the majority of all respondents. Finally when considering **increasing engagement**, for adults, the key factors were largely altruistic, focussed on enabling them to support heritage (55%), benefit their community (40%) or help other people (32%). This finding is also reflected in the Performing Lincolnshire evaluation, where participants appreciated the sense of being valued for their knowledge, opinions and their stories, and heritage was observed to resonate with people when they find a personal relationship with it and feel they directly benefit from it.

17. Risk

Number	Source (Lack of/failure to...)	Consequences	Impact (1-4)	Probability (1-4)	Score (I x P)	Status	Proposed Actions	Date
1	Failure to engage key stakeholders with concept developments	Reputational damage to project.	Major (3)	Possible (2)	6	Active	Stakeholders Events are being organised, and where appropriate, individual meetings organised to ensure all key stakeholders are aware of potential project.	Sep 16
2	Failure to engage public/ stakeholders/partners/ staff with project	Reputational damage to project and LCC as brief changes.	Major (3)	Probable (3)	9	Active	See 1 above.	



3	Fundamental Budget Review 2015	Linked to libraries procurement, lack of funding to operate service, failure to deliver statutory duty, loss of accreditation and reputation.	Major (3)	Almost Certain (3)	12	Closed		
4	Fundamental Budget Review 2016	Linked to 2015 review, and may require further savings to be made	Major (3)	Possible (2)	6	Monitoring		
5	Resource	Lack of resources to undertake project.	Major (3)	Possible (2)	6	Active	Engagement with people and resources to assist. Vinci Mouchel and Legal engaged.	
6	Negative Feedback	Spend in times of austerity.	Critical (4)	Possible (2)	8	Monitoring	Communication strategy.	

## 18. Conclusion and Recommended Option

In light of the review of all potential options reviewed above, it is considered that none of the Long List of Options can be recommended for implementation at the current time. In particular the options relating to establishing and/or transferring the service to an external entity are not sufficiently well understood.

This, however, does not prevent progress being made. In particular the necessary cultural and organisational changes can be progressed. Furthermore there is an opportunity for this to be done on the basis of a trading account within the County Council. On this basis the Heritage Service would become driven by many of the 'commercial' disciplines that would need to be applied by an external entity whilst managing risks during the period of change.

It is proposed that this internal arrangement would apply for an initial two year period. During that period further work would be done to assess the alternative governance arrangements with the intention that by the end of the two years the internal service will operate as both a more robust base case/control option within the appraisal and in a way which would be more fit for purpose in the event of a change to an alternative governance arrangement.

It is further proposed that income achieved by the Heritage Service in the period April 2015 to March 2018 would be retained within it for reinvestment back into the Heritage Service.

**APPENDIX A  
Potential Funders**

Who	What they Might Fund		Application Process	How Much	Focus	LCC/ Friends	Comments
	Capital	Revenue					
Heritage Lottery Fund	Yes	Yes	Depends on Grant applied for. Typically there are two stages of application	Various.	Heritage	LCC	Transition funding 'Resilient Heritage' programme with grants available up to £250,000.
European Regional Development Fund	Yes	Yes	Applications made via the programme team for East Midlands	East Midlands allocated £110.9M – 80% allocated to Research and Innovation, SME competitiveness, Low carbon and energy efficiency and ICT.			The GLLEP have identified 5 priorities for growth which includes: The importance of Lincolnshire's place, transport infrastructure to connect to national/international markets, heritage/environment and communities as a place for sustainable growth.
DCMS Wolfson Museums & The Wolfson Foundation	Yes	Yes	Spring Stage 1 – before 5 January. Stage 2 – deadline 1 March. Autumn Stage 1 – before 1 July. Stage Two – deadline 1 September.	Range between £2,000 and £8M.	Museums & Galleries	LCC	The Wolfson Foundation also in partnership with Wellcome.
Clore Duffield Foundation	Yes	Yes	Main Grant – 2 sides of A4 – no deadline. If successful at 1 <sup>st</sup> stage submit full proposal. Trustees meet twice a year.  Learning Spaces	Main Grant – less than £5,000 and in excess of £1M.  Ranging from £2.5m Clore learning centres in national museums, to donations of less than £5,000 for single rooms in local history heritage buildings.	Museums  Museums Archives	LCC	Majority of support is directed towards the cultural sector, and in particular to cultural learning and to museum, gallery, heritage and performing arts learning spaces.
Biffaward	Yes	Yes	Online Expression of Interest. If project meets assessment criteria, invited to complete a Full Application for consideration by the Biffa Award Board. Rolling programme – applications considered at next Board Meeting.	Flagship Grant £150,000 - £500,000 (Example: Coventry Transport Museum were granted £498,240 over two years to tell the story of land speed records, set against a background of technological development and social change.	Museums, Galleries and Heritage	Friends But must be registered with ENTRUST	Proximity to landfill operation important criterion for eligibility. - We are eligible 0.66 and 5.22 miles proximity. Primary purpose, a cultural facility that will offer public access for recreation, interest and education - open to the public for published periods each year, and attracting tourists or day visitors.
Wellcome Trust	Yes	Yes	Online application – no deadline.	No minimum and no maximum.	Arts	LCC	Grant previously received for digitisation. Link to Public Health
Paul Hamlyn Foundation	Yes	Yes	1 <sup>st</sup> stage – online application form. If successful invited to 2 <sup>nd</sup> stage.	No minimum or maximum - previous grants ranged from £6,000 - £260,000.			Lincoln One Venue (LOV) granted £189,500 in 2012.
The Foyle Foundation	Yes	Yes	Applications for non-capital projects accepted all year round – no deadlines. Capital projects seeking more than £50,000 considered twice a year in Spring and Autumn. Application form downloadable word document.	Grants made in 2013 - ranged from £10,000 - £250,000.	Museums Archives	Friends	
The Rayne	Yes	Yes	Stage 1 application reviewed by Grants Administrator, Grant	Average grant £15,000 –			

Foundation			Manager and Director. Strongest applications invited to make fuller Stage 2 application. Strongest proposals presented to Trustees who meet 4 times a year.	favour projects where grant will help lever funding and involvement from other organisations.			
Garfield Weston Foundation	Yes	Yes	1 page downloadable application - no deadline. Approximately 4 months for formal outcome.	Regular Grant - £1,000 - £99,999 Major Grant – Over £100,000.	Museums Archives	Friends	Funding cannot be extended beyond 1 year.
John Ellerman Foundation	Yes	Yes	Stage 1 – no more than 2 sides A4 and copy of income and expenditure statement. Stage 2 – more detailed application.	Minimum £10,000 – no maximum but over £100,000 is unusual. Average last year £25,000.	Museums & Galleries	LCC	Natural Historian <i>The families and genera of living rodents</i> <i>Checklist of Palaearctic and Indian mammals</i> <i>South African mammals</i>
The Pilgrim Trust	Yes	Seed money to get a project started.	Online application form accepted at any time during the year – will be contacted within 2 weeks if application rejected. If accepted, additional information may be required. Trustees meet 4 times a year to consider applications. Timeline usually 4-6 months.	85% of grants awarded in 2012 were £21,500 and under.	Museums Archives		Our aim is to preserve and promote Britain's historical and intellectual assets and to provide assistance to vulnerable members of society. Do not consider projects with capital costs of over £1M where partnership funding is required.
Esmee Fairbairn Foundation	No	Yes	On-line eligibility quiz. 1 <sup>st</sup> stage application 1000 words. If successful invited to 2 <sup>nd</sup> stage. Funding decisions made throughout the year – can apply any time – but only consider 1 application per organisation at a time.	Previous grants awarded: £12,000 - £105,000 (£2,400,000 to Museums Association in 2011).	Heritage Museums & Galleries Social Change	LCC/ Friends	80% grants are multi-year grants – usually up to 3 years – will consider longer but rarely beyond 5 years Can apply for funding from both Main Fund and Collections Fund below.
The Esmee Fairbairn Collections Fund	No	Yes	Grants awarded in 2 rounds each year. Downloadable application form.	Previous grants ranged from £20,000 - £100,000.	Museums, Galleries and Heritage	LCC	Better appreciation of the potential of collections and better use of collections.

APPENDIX B  
HLF Outcomes

### The difference we want to make

We describe the difference we want to make to heritage, people and communities through a set of outcomes. These outcomes reflect the full range of what we want to achieve and are drawn directly from our research into what HLF-funded projects have actually delivered.

You do not have to contribute towards all of the outcomes listed here. Many different combinations can make a successful application. For example, a project could either:

- contribute a little towards a large number of outcomes; or
- contribute a lot towards a small number of outcomes.

We will consider the quality of the outcomes that your project will achieve. This means that contributing towards more of the outcomes listed here will not necessarily make your application stronger.

We describe the outcomes we value the most as 'weighted' outcomes.

We provide detailed descriptions of these outcomes in **Section four: Project outcomes** in **Part four: Application form help notes**. These tell you what changes we want to bring about with our funding, and include some suggestions of how you can measure them.

**Outcomes for heritage:** W Weighted

With our investment, heritage will be:

- better managed W
- in better condition W
- better interpreted and explained
- identified/recorded

**Outcomes for people:**

With our investment, people will have:

- developed skills W
- learnt about heritage W
- changed their attitudes and/or behaviour
- had an enjoyable experience
- volunteered time

**Outcomes for communities:**

With our investment:

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

**As a minimum, we expect projects to achieve the following:**

For projects requesting less than £2million:

- one outcome for heritage; and
- one outcome for people; and
- one outcome for communities.

For projects requesting £2million or more:

- more than one outcome for heritage; and
- more than one outcome for people; and
- more than one outcome for communities.

APPENDIX C  
Long List of Options – 2013/14

OPTION	Heritage Service Options Appraisal Spreadsheet	Achieve £1.8m of Savings (Massive weighting - pass fail)	LCC control - no external partner to deal with	Discussions with Existing Funders (No scores 3, Yes scores 0)	Keeps the ownership of the collections and buildings with the same organisation (Asset lock)	80% relief on NNDR	5% VAT on Fuel	Ability to reclaim gift aid	Reduction in public service (No scores 3, Yes scores 0)	Reputational damage to LCC (No scores 3, Yes scores 0)	Greater Economies of scale	Joint collections management resource	Joint ICT Resource	Focus on Heritage Service Delivery	LCC determines specification and contract monitoring required? (No scores 3, Yes scores 0)	Fundraising potential?	Relies on release of LCC CEC resources? (No scores 3, Yes scores 0)	Costs of Transfer (TUPE etc) (No scores 3, Yes scores 0)	New/ untried organisation = Risk (No scores 3, Yes scores 0)	Strategic Fit with Service's Mission Aims and Objectives	Total Score	Rank
A	Do nothing	0	3	3	3	0	0	0	0	3	1	3	3	1	3	2	3	3	3	1	35	2
B	Add the Heritage Service to the Library Service Procurement	1	0	0	2	2	2	2	2	0	3	3	3	0	0	2	1	0	2	2	27	8
C	Set up an LCC controlled trading company	3	3	2	3	0	0	0	3	3	2	3	3	3	3	3	3	0	3	3	43	1
D	Join and existing Teckal Company (e.g. Compass Point)	1	0	0	2	0	0	0	2	1	3	2	2	1	0	1	1	0	3	2	21	16
E	Collaboration or Joint Venture with the University of Lincoln	1	0	0	2	3	3	3	2	1	3	2	2	1	0	3	1	0	3	2	32	6
F	Transfer operations to an existing charitable trust	1	0	0	2	3	3	3	2	2	3	2	2	1	0	3	2	0	2	2	33	4
F1	Heritage Trust for Lincolnshire	1	0	0	2	3	3	3	2	2	3	2	2	1	0	1	1	0	2	2	30	6
F2	Inspire Lincs	1	0	0	2	3	3	3	2	2	3	2	2	1	0	1	1	0	2	2	30	6
F3	Vivacity	1	0	0	2	3	3	3	2	2	3	2	2	1	0	1	1	0	2	2	30	6
F4	Magna Vitae	1	0	0	2	3	3	3	2	2	3	2	2	1	0	1	1	0	2	2	30	6
G	Form a Community Benefit Society (CBS) with Charitable Status	1	0	0	2	3	3	3	2	3	2	2	2	3	0	3	0	0	0	3	32	5
H	Form a Charitable Trust and Company Limited by Share (Non-Profit Distributing Organisation)	1	0	0	3	3	3	3	2	3	3	3	2	3	0	3	0	0	0	3	35	2
I	Form a Community Interest Company	0	0	0	2	0	0	0	2	2	2	2	2	3	0	3	0	0	0	3	21	16
J	Form a Commercial Company	0	0	0	2	0	0	0	2	0	2	2	2	3	0	1	0	0	0	1	15	19
K	Enter into a joint venture agreement with other authorities	0	0	0	2	0	0	0	2	1	3	2	2	2	0	2	3	0	3	2	24	13
L	Run a Procurement exercise for the Heritage Service	1	0	0	2	2	2	2	2	0	3	2	2	3	0	1	1	0	2	2	27	7
M	Split the Heritage Service, such that Archives remains in the county Council as part of "enabler strand" along with information governance and the rest spins out	1	0	0	2	1	1	1	2	1	1	0	0	3	2	2	1	0	2	2	22	14
N	Split the Heritage Service into its component parts, with different forms of governance above	1	0	0	1	1	1	1	2	0	0	0	0	3	2	1	0	0	2	1	16	18
O	Split the Heritage Service's site based operations from the curatorial functions	1	0	0	2	0	0	0	2	1	1	3	3	2	0	1	1	0	1	2	20	17

Scoring

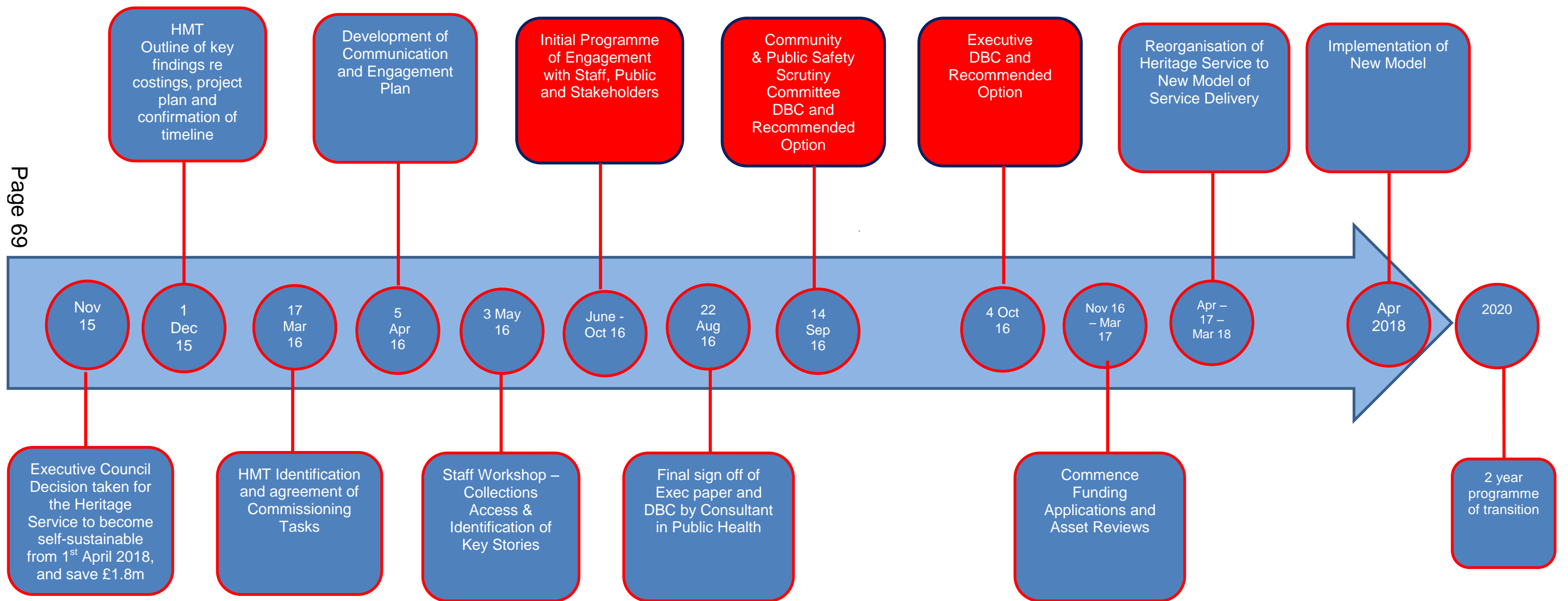
No = 0

Possibly = 1

Probably = 2

Yes = 3

Project Timeline



**Appendix E**  
**Route map**

**Stage plan 2016 – 2018:**

<i>Asset reviews</i>	<i>2016 - 2017</i>	<i>2017 - 2018</i>	<i>2018 - 2019</i>
<b>Full asset review of sites and services</b>	<b>Oct – March 2017</b>		
<b>Property maintenance (short, medium, long-term property maintenance schedules)</b>	<b>Oct – March 2017</b>		
<b>Financial viability/business unit area (use and potential use, commercial functions, audience numbers etc),</b>	<b>Oct – May 2017</b>		
<b>Collections review and rationalisation</b>	<b>Started May 2016</b>	<b>Complete March 2018</b>	
<b>Staffing skills audit</b>	<b>Jan – June 2017</b>		
<b>Staffing operating structure review</b>	<b>Jan – June 2017</b>		
<i><b>Engagement and consultation strategy and plan</b></i>			
<b>Comprehensive public engagement and consultation programme</b>	<b>Oct – June 2017</b>		
<b>Comprehensive stakeholder engagement and consultation programme</b>	<b>Oct – June 2017</b>		
<i><b>Business &amp; Service planning for Heritage Services</b></i>			
<b>Draft detailed strategic plan</b>	<b>Oct – July 2017</b>		
<b>Draft detailed business plan (including financial plan)</b>	<b>Oct – July 2017</b>		
<b>Real below the line costs identified and quantified</b>	<b>Oct – July 2017</b>		
<b>Alternative governance models explored</b>		<b>July – Oct 2017</b>	
<b>Possible development and preparation for a governance model</b>		<b>Oct – Apr 2018</b>	
<b>Development and transformation into</b>			<b>Apr 2018 –</b>



<b>a new service delivery model</b>			<b>March 2019</b>
<b><i>Service re-modelling</i></b>			
<b>Internal restructuring</b>		<b>July - Oct 2017</b>	
<b>Property rationalisation</b>		<b>July - Oct 2017</b>	

**APPENDIX F - Museums, Libraries, Archives & Heritage Strategy 2013 – 18**

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## 1 Summary

Lincolnshire is a unique and culturally vibrant place in which to live and work. Museums, Libraries, Archives & Heritage Services play a crucial role in tackling social exclusion, contributing to regeneration, to promoting safer communities, encouraging healthier lifestyles, providing opportunities for voluntary and community activity and stimulating lifelong learning. These sectors have a significant role to play in achieving this aspiration, by providing inspiring, engaging and educational experiences, promoting a sense of place for all who visit, live and work in Lincolnshire and contributing to Lincolnshire's economic development.

Lincolnshire has a strong sense of place and its museums, libraries and heritage sites play an important part in helping residents and visitors alike to understand the deep roots of its cultural identity and its traditions. Libraries and heritage sites act as information hubs, and venues for permanent and temporary exhibitions also provide international insights, access to a wide range of cultures and enable us to showcase Lincolnshire on a national and International stage. These sites play a significant role in contributing to Lincolnshire's overall social and economic well-being. The impact of the recession and the reduction in public funds make it imperative that our museums, libraries, archives and heritage sites continue to develop new ways of working, seek out new partnerships and explore innovative methods to generate income.

In separate but linked Fundamental Service Reviews were undertaken on the Library Service in 2007 and the Heritage Service in 2009. The outcomes of these provided the basis for restructuring of the services in the areas, and a roadmap for service delivery in the period 2009 – 2013. Perhaps the most far reaching outcome of this work was the creation of the new and hugely popular website [www.lincstothepast.com](http://www.lincstothepast.com), launched in the spring of 2011 which brought together publicly searchable databases for the museums, libraries, archives and Lincolnshire's sites and monuments record.

This new strategy acknowledges the progress made since 2009 and provides a fresh set of strategic priorities that can be linked directly back to those generated in 2007 and 2009. This strategy is underpinned and informed by a number of related documents and recent internal reviews, most significantly the Library Needs Assessment, recently updated Museum, Archives, Local Studies and Library Collections Development documents, and individual museum and heritage site Interpretation Strategies. The latter in particular provide local analysis of the factors affecting sites, and more detailed audience profiles. This strategy covers the period 2013 – 2018 and will be reviewed in 2018.

There are four main sections in this strategy;

Section 2: Benefits and Strategic Priorities - what we want to achieve through the provision of Museums, Libraries, Archives and Heritage, Section 3: Audiences and users, Section 4: Actions - what we need to do to deliver the Strategic Priorities, Section 5: Key Strategic Documents – the local and national strategies that have helped inform the Strategic Priorities.

## 2 Benefits and Strategic Priorities of Museums, Libraries, Archives & Heritage

### 2.1 Benefits

The key **Benefits** that Lincolnshire County Council is aiming to achieve through the provision of Museums, Libraries, Archives & Heritage can be summarised:

- Enjoyment - helping people's mental health and physical wellbeing
- Learning and education - contributing to people's knowledge
- Place making – preserving collections and providing the information about local places which makes them distinctive and gives people a sense of identity
- Economic benefits - contributing to Lincolnshire's economy through tourism and helping people achieve their economic potential

### 2.2 Strategic Priorities

The Benefits outlined above will be delivered through delivering to the following five **Strategic Priorities**:

1. **Realising sustainability and resilience**, maximising the profitability of trading activities or earning more income through fundraising and developing strong and realistic plans.
2. **Forging sustainable and useful partnerships** within our local communities and across the public and commercial sectors. This means delivering outcomes for other organisations by either directly delivering or facilitating through services and the sites offered. This means delivering social and economic impact in Lincolnshire. This means re-casting education and outreach functions in terms of delivery to specific learning outcomes of partner organisations.
3. **Inspiring and engaging more people**, and a wider range of people, with our digital services, collections and stock – giving our visitors and non-visitors what they want and maintaining a programme of activities which will encourage them to visit and engage with us on a regular basis. This is also about creating a sense of place and helping deliver social cohesion and common sense of belonging
4. **Delivering an increased profile** for the cultural heritage of Lincolnshire.
5. **Developing the workforce** of staff and volunteers that is flexible, motivated and skilled

## 3 Audiences

In terms of visiting audiences for heritage sites there is typically a combination of local residents, day visitors to Lincolnshire and educational school party visits. 75% of people who responded to our visitor survey in 2012-13 lived in the county, and 79% lived within 50 miles of the site they were visiting. Over 95% of visitors rated their visits "good or very good".

Some were motivated by a specific interest in a particular site, be it for instance aviation heritage, contemporary art, medieval history, or agricultural and industrial machinery. Within this, significant user segments include couples over 50, families (parents and grandparents) with children of primary school age, and tourists. The general visitation pattern for heritage sites matches surrounding counties; school visits fall away during the summer holiday periods, combined with peak day visit tourism activity in July and August, accounting for about a quarter of annual visits, with around three quarters of the annual visitor total coming between April and October. Beyond this core visiting audience, the motivation for visits to sites vary, but often relate to research, volunteering and outreach.

Audiences and users in relation to Libraries and Information Services are different. Motivation for access of the services at Libraries and through remote/digital means occurs for a more complex range of reasons. In addition Local Authority provision for library users is different to heritage because it is a statutory obligation. In this respect provision is comprehensive in Lincolnshire; every household in Lincolnshire is within a 30 minute drive time of a static library, 96% are within a 15 minute drive time, and 93% are within 30 minutes by public transport. There is a very significant overlap in static library catchment areas with 300,807 out of 323,242 households able to reach more than one library within a 30 minute drive time. Currently, 56% of issues are delivered through the 10 largest libraries, each of which is located in the county's largest urban centres. In 2011-12 20% of Lincolnshire's population was an 'Active Borrower', and audience research has shown that they were almost entirely representative of the county's population as a whole. The Library Service had over 3 million interactions with the public in 2011-12 and like the heritage sites high levels of customer satisfaction were recorded (over 96%).

#### **4 Actions: how the Strategic Priorities will be realised**

Increasingly delivery of services in the heritage, culture and information services sectors is becoming a joint activity moving away from provision being organised and funded from the public purse, to joint and collaborative methods of provision. The reality of this takes many forms and includes models of community library provision, use of volunteers to run heritage sites previously directly run and funded by Local Authorities, and the recognition that there is an equal role for the wider public and non-professional alongside professionally trained staff when it comes to the creation and co-creation of knowledge in the museums, archives, heritage and library sectors. Rapid advances within online and digital channels mean that information creation, dissemination and access occur beyond the confines of directly delivered access points. These wider trends inform the actions below, and the scope of impact achievable with limited resources.

##### **4.1 Realising sustainability and resilience – maximising the profitability of trading activities or earning more income through fundraising and developing strong and realistic plans.**

- All Service areas will work towards creating ever more self-sustaining sites and services through controlling costs, and accessing funding streams from the public, private and charitable sectors.

- Implementation of the service changes as a result of the Library Needs Assessment
- Exploring the potential of RAF Scampton as a focused site for aviation and wider heritage provision for the County
- Modifying and shaping the size, scope and desired outcomes of services such that they are capable of responding to commissioning opportunities, or can be commissioned directly.
- Responding directly to local need, making greater use of local intelligence frameworks, and investing in the infrastructure and capability to undertake, capture and use this information and then translate it into modified services on the ground.
- Developing new opportunities for the general public for learning, achievement and improving skills through engagement with sites, collections and information, with an end outcome of supporting individual and community economic sustainability
- Making even greater use of volunteers and friends groups in direct service delivery.
- Managing and developing volunteers in a sensitive way, understanding what the volunteers engaged want and need to maintain and develop their motivation for quality service delivery; make effective use of the Volunteer Reference Group.
- Fully exploring and maximising all income generation activities that build on, enhance, and in some cases partially replace core service activity

**4.2 Forging sustainable and useful partnerships** - within our local communities and across the public and commercial sectors. This means delivering outcomes for other organisations by either directly delivering or facilitating through the sites and services offered. This means delivering social and economic impact in Lincolnshire. This means re-casting education and outreach functions such that they deliver specific learning outcomes for partner organisations.

- Promoting and widely disseminating evidence of success and impact in the areas of public health, economic development and educational attainment in particular, and use these successes as an advocacy tool with internal and external partners such that they understand how useful and effective libraries, museums and heritage sites are at delivering real outcomes and benefits.
- Developing services to deliver wider benefits that are not simply focused on library/museums/heritage agendas, which means:
  - Developing a coherent service offer that supports individual education, learning and personal development
  - Ensuring compatibility with local economic and health priorities
  - Providing opportunities for improving interpersonal, social and employability skills
- Working more strategically with Friends organisations in heritage, libraries and archives so the work of these organisations fits with the wider strategic priorities outlined in this strategy.

- Prioritising the development of new partnerships that enhance, diversify and maximise access to services, sites, collections, and deliver more effective use of resources.
- Only investing time in new and existing partnerships that enhance and deliver more effective use of resources:
  - Further work with the Aviation Heritage Lincolnshire
  - Work with the RAF to explore strategic development opportunities of RAF Scampton and the Battle of Britain Memorial Flight Visitor Centre
- Understanding the needs of specific audience segments and create mechanisms for the capturing and feedback and input of these groups:
  - Developing and establishing a young people’s focus group (and/or working with the Youth Council) to identify their specific needs
- Engaging with university students to effectively promote libraries, museums, heritage and archives and the opportunities they provide.

**4.3 Inspiring and engaging more people** - and a wider range of people, with our services, collections and stock – giving our visitors and non-visitors what they want and developing new activities which will encourage them to visit and return on a regular basis. This is also about creating a sense of place and helping deliver social cohesion. This also means creating an events and exhibitions programme that delivers high engagement as well as high quality.

- Ensuring that there are layers of interpretation at sites (and that it is of sufficient quantity and quality) to inspire and engage; within this ensuring that digital access is improved and maximised
  - Continuing to develop the Lincs To The Past web presence, improving ‘behind the scenes’ data sources and databases as necessary
  - Developing frontline staff skills to take on the additional role as facilitators
  - Utilising mobile, ipad, android and other technological platforms to offer enhanced interpretation at heritage sites
- Continuing to invest in sites providing enhanced research, interpretation and other visitor facilities
  - Developing plans for improving facilities for the public accessing archives directly in line with Archives Accreditation.
  - Developing and increasing permanent and flexible interpretation space at the Collection with possible development of a mezzanine floor.
  - Implementing further enhancements to Museum of Lincolnshire Life

- Improving the catering offers at BMMF and Museum of Lincolnshire Life
- Actively implementing the Collections Development Strategies
  - Focusing on the use and enjoyment of Lincolnshire's collections by diverse communities to enhance people's sense of identity and place; build pride in the county and support connectivity and social cohesion
  - Creating collections on a countywide basis that reflect, champion and are responsive to the diverse and changing communities of Lincolnshire
- Designing service delivery to reflect Lincolnshire County demographics recognising the need to deliver services in an age specific manner
  - Engaging enablers at Libraries to facilitate access to digital resources and information
  - Utilising ipad and android technology to deliver information and services in Libraries
- Effectively marketing and promoting of our services, to ensure that customers know how inspiring our services are
  - Structured and strategic use of Facebook, twitter and other social media to promote Library services, and heritage exhibitions, events and activities
- Ensuring joined up working with other organisations to guarantee a complementary programme of events and activities is delivered on the ground
  - Fully engaging with Historic Lincoln Partnership and the other cultural organisations
  - Working more effectively museums and other heritage organisations across the County
- Delivering targeted and time limited research services to improve knowledge and understanding; giving support to researchers and academics
- Creating a wide variety of events, exhibitions, education, learning and engagement activity to enhance access to collections
  - Delivering a rounded programme of events, exhibitions and activities at all Lincolnshire County Council operated museum and heritage sites aimed at all target audiences
  - Developing intergenerational learning in libraries and heritage sites e.g. ICT competent young people teaching/enabling less digitally literate
  - Developing target driven campaigns prioritising health and social agendas within this focusing on specific themes



#### 4.4 Developing the workforce

**Develop the workforce** of staff and volunteers so that they remain flexible, motivated and skilled.

- Using gap analysis to accurately identify the skills absent in the service as a whole as well as individuals, and identifying the most appropriate methods for filling the gaps.
  - a) Differentiating between the different skills sets the existing workforce has (generic skills, specialised professional skills, digital skills, technical expertise) and what will be needed in the future.
  - b) Developing a staged plan for moving forward from one to the other

#### 4.5 Delivering an increased profile

**Delivering an increased profile** for the cultural heritage of Lincolnshire.

- Lincolnshire needs to be a destination and heritage and culture is the key. Effective development and promotion of the counties key sites is a priority:
  - Delivering of the Historic Lincoln Programme, including websites and marketing channels, with the Lincoln Castle Revealed which are a particular priority within this.
  - Promoting the Aviation Heritage in the County, and exploring the potential of RAF Scampton as an anchor site.
- Delivering a wide variety of events, exhibitions, education, learning and engagement activity so all audiences are catered for, and within this key target audiences are prioritised
  - Developing and delivering a high profile and populist exhibition programme
  - Maintaining the commitment to delivery of the National Portfolio Programme at The Collection
- Capitalising on marketing opportunities: ensuring that successes and achievements are promoted and celebrated to the maximum, such those achieved in 2012, including a number of Lincolnshire Heritage Awards and the Contemporary Arts Society Award *commissioning to collect*.
  - Ensuring there is an extensive City and County wide offer and programme for the 2015 Castle and Magna Carta re-launch
- Focusing on the promotion of collections on a countywide basis that reflect, champion and are responsive to the diverse and changing communities of Lincolnshire
  - Developing and expanding the Lincs To The Past website

- Focussing on key gaps from the emergent Heritage Interpretation Strategy, likely to include the Roman and Medieval periods, and the aviation, agricultural and industrial heritage of the county

## **5 Local and National Plans and Strategies informing the Museums, Libraries, Archives & Heritage Strategy 2013 – 18**

### **5.1 Lincolnshire County Council service plans and strategies**

#### **5.1.1 Lincolnshire County Council Business Plan 2012-2015**

Key extracts from the LCC Business Plan

Vision: Building on our strengths, Protecting your lifestyle, Ambitious for the future

Purpose:

- Investing in infrastructure and the provision of services
- Commissioning outcomes based on our communities needs
- Promoting community wellbeing and resilience
- Influencing, coordinating and supporting other organisations that contribute to the life of Lincolnshire
- Making best use of all our resources

#### Aim to increase Heritage Service interactions to 5.7m by 2014-15

- Making best use of our resources – Delivering £135m of savings from 2011-12 to 2014-15 to balance our budgets.
- Getting better value from our use of land and buildings through the Property Rationalisation Programme.
- Transforming the quality of our IT and reducing costs.
- Using information from customers, employees and other sources to learn and improve.

Satisfaction with the Council - corporate target 90% by 2013-14 (Libraries and Heritage are already at over 96%)

#### **5.1.2 Lincolnshire's Cultural Strategy 2010-2015 *Promote, Provide, Participate!***

Over-arching strategy in relation to Cultural provision in the County

- Aim 1 To promote the wide ranging benefits of Lincolnshire's culture
- Aim 2 To increase cultural provision in Lincolnshire, preserving and developing its unique cultural identity
- Aim 3 To enable and encourage people participate in Lincolnshire's culture

### 5.1.3 Economy and Culture Service Plan 2012-2015

Vision: Heritage: *enriching your future by preserving your past*

Libraries: *access to information for all*

Purpose of the Service:

*To support and promote economic growth and resilience, and to meet the cultural and economic needs and interests of Lincolnshire residents.*

- Complete a Training Needs Analysis for Economy and Culture Staff and develop an appropriate training programme
- Increase the number of volunteers engaged in service delivery
- Achieve Investors in Volunteers accreditation (achieved in June 2012)
- Maximise the amount of external funding attracted to Lincolnshire
- Ensure effective use of resources
- Design and deliver a cost effective programme of capital projects
- Effective engagement with members to achieve their political and local agendas
- To maintain high levels of customer satisfaction with library and heritage services
- Delivery the Historic Lincoln Programme
- Provide increased opportunities for people to participate in and enjoy cultural activities (links to Cultural Strategy)
- Preserve the historical and cultural heritage of Lincolnshire
- Support the Healthy Living agenda in Lincolnshire through the provision of a range of cultural and leisure opportunities
- Ensure Compliance in relation to Equality and Diversity
- Develop and Enhance the role of volunteers in providing services to support economy and culture activities
- Undertake and implement a library needs assessment and Library Development Strategy

## 5.2 Lincolnshire Economic, Health and Social Strategies

### 5.2.1 Central Lincolnshire Economic Growth Strategy 2012-2031

The key relevant features of which are:

Vision: Unlocking Potential to Deliver Growth

Aiming to stimulate the local economy by supporting new and existing businesses, tourism and attracting inward investment

Priorities:

- Maximise traditional economic strengths
- Address structural weakness and competitive disadvantages
- Identify and exploit new sector/market opportunities
- Identify and support existing business capable of significant growth
- Support new market development

- Support new product development
- Support entrepreneurs, start-ups and innovation
- Support workforce development

***This Growth Strategy was informed by a local economic assessment undertaken in 2011***

Key statements from which are:

“the county’s coastline and internationally important heritage have ensure the presence and importance of the tourism industry”

Tourism represents 7% of the county’s employment, making it the sixth most important sector in after Government Services, Retail & Wholesale, Financial & Business Services, Agri-Food and Non-Food Manufacturing.

Tourism employment is expected to increase by 29% by 2030.

### **5.2.2 Joint Health and Wellbeing Strategy (2012 – 2018)**

The Joint Health and Wellbeing Strategy (JHWS) is a document that aims to inform and influence decisions about health and social care services in Lincolnshire so that they are focused on the needs of the people who use them and tackle the factors that affect everyone’s health and wellbeing.

There are five main themes, with mental health running throughout the document:

- **Theme: Promoting Healthier Lifestyles**  
Outcome: People are supported to lead healthier lives  
Relevant priority in relation to this strategy: Improve people’s sense of mental wellbeing.
- **Theme: Improve the health and wellbeing of older people**  
Outcome: Older people are able to live life to the full and feel part of their community  
Relevant priority in relation to this strategy: Increase respect and support for older people within their communities
- **Theme: Delivering high quality systematic care for major causes of ill health and disability.**  
Outcome: People are prevented from developing long term health conditions, have them identified early if they do develop them and are supported effectively to manage them.  
Relevant priority in relation to this strategy: Minimise the impact of long term health conditions on people’s mental health.
- **Theme: Improve health and social outcomes for children and reduce inequalities.**  
Outcome: Ensure all children get the best possible start in life and achieve their potential.  
Relevant priorities in relation to this strategy: Ensure all children have the best start in life by 1) Improving educational attainment for all children, 2) Improving parenting confidence and ability to support their child’s healthy development through access to a defined early help offer; Ensure children and young people feel happy, stay safe

from harm and make good choices about their lives, particularly children who are vulnerable or disadvantaged.

- **Theme: Tackling the social determinants of health.**

Outcome: Peoples health and well-being is improved through addressing wider determining factors of health that affect the whole community.

Relevant priorities in relation to this strategy: Support more vulnerable people into good quality work (such as young people, carers and people with learning disabilities, mental health and long term health conditions); Ensure public sector policies on getting best value for money include clear reference and judgement criteria about local social impact, with particular reference to protection and promotion of work opportunities and investment in workforce health and wellbeing

### 5.3 Sector specific Strategies

#### 5.3.1 Arts Council – Great Museums and Libraries for Everyone 2012

These are the five aims identified for these sectors that should inform strategic policy development, and provide the framework for ACE funding decisions in these sectors:

1. Excellence is thriving and celebrated in museums and libraries
2. More people experience and are inspired by museums and libraries
3. Museums and libraries are sustainable, resilient and innovative
4. The leadership and workforce are diverse and highly skilled
5. Every child and young person has the opportunity to experience the richness of museums and libraries

#### 5.3.2 Museums 2020: Vision for Museums

This is the most up to date information likely to shape the final 2020 Vision when it is finalised in later 2013. These are the results of research findings from a national survey of public opinion on the strategic direction needed to be taken by museums, published April 2013.

##### Essential purposes

- Care and preservation of heritage
- Holding Collections and mounting displays
- Creating knowledge for and about society

##### Priority purposes

- Promoting economic growth through tourism, investment and regeneration
- Facilitating individual development through education, stimulation and building skills
- Promoting happiness and wellbeing

##### Low-priority purposes

- Fostering a sense of community
- Helping the vulnerable
- Protecting the natural environment

##### Purposes challenged by the public

- Providing a forum for debate
- Promoting social justice and human rights

#### 5.3.3 Leading Museums – MLA’s Museums Action Plan 2009

The key elements in MLA’s Museum Action Plan ‘Leading Museums’ published in July 2009 are still generally relevant across all the domains of museums, libraries and heritage:

- Maximise use of digital technology
- Provide a consistent life-long learning offer throughout the sector
- Provide affordable and accessible workforce development opportunities
- Develop new income streams and maximise returns on existing ones
- Adopt a more strategic approach to collections across museums
- Develop more partnership working inside and outside of the sector
- Develop more work to support the social inclusion agenda

#### **5.3.4 The National Archives – Archives for the 21<sup>st</sup> Century**

The policy makes five recommendations to support an effective, relevant and sustainable archives sector:

- Develop bigger and better services in partnership - working towards increased sustainability within the sector
- Strengthened leadership and a responsive, skilled workforce
- Coordinated response to the growing challenges of managing digital information so that it is accessible now and remains discoverable in the future
- Comprehensive online access for archive discovery through catalogues and to digitised archive content
- Active participation in cultural and learning partnerships promoting a sense of identity and place within the community

#### **5.3.5 What Makes A Good Library Service? Guidelines on public library provision in England for portfolio holders in local Councils**

Libraries give identity to a community and provide opportunities for everyone within it. Their role is to enrich lives, to play an important role in meeting the aspirations of local communities and engage in the Big Society. A good library service will deliver against key policy objectives and provide:

- A positive future for children and young people
- A fulfilling life for older people
- Strong, safe and sustainable communities
- Promotion of local identity and community pride
- Learning, skills, and workforce development
- Health improvements and wellbeing
- Equality, community cohesion and social justice
- Economic regeneration

The library service should also offer a programme of activities and events that reflect the important role of the library in the local community. These may include:

- Activities for parents and toddlers, children and young people
- Events to encourage the experience of literature through author talks, reading groups, storytelling and promoting the joy of books through imaginative selection and presentation of stock
- Programmes to support family and community learning
- Promotion and support of the study of local history
- Programmes to develop information literacy, ICT proficiency, and skills for life