

CITY OF YORK COUNCIL  
AND  
YORK MUSEUMS TRUST  
PARTNERSHIP  
DELIVERY PLAN  
2008 -2013



**yorkmuseumtrust**  
[www.york.trust.museum](http://www.york.trust.museum)

## Introduction

- 1 This Partnership Delivery Plan is a joint agreement between the Council and the York Museums Trust and is an annex to the 'Funding Agreement'. It sets out:
  - the aims and objectives of the partnership
  - the key development areas to be pursued
  - core services to be provided
  - performance targets to be met by the Trust and Council
  - performance information to be provided
  - review and reporting procedures
  - partnership arrangements between the Council and the Trust
  
- 2 The Trust is an independent organisation working in partnership with the Council with the aim of delivering a Museums and Gallery service that will become recognised as one of the very best in the country. The Select Committee report on Museums and Galleries in 2007 said:
 

*The Trust strongly recommend that any large local authority museum service motivated to seek improvement should look at the successful models operating in Sheffield and York.*
  
- 3 This plan covers years five to ten of the Trust (2008 – 2013). It may, however, be updated by the Council and the Trust during that period in the light of changing circumstances. The Funding Agreement provides a process whereby the Plan will formally be reviewed by the Council and the Trust towards the end of the 5 years in order to create a new plan for the next 5 years.

## Core Aims

- 4 The core aims of the partnership are drawn from 3 sources.
  - a) The Council's core objectives, particularly:
    - *Improve the way the council and its partners work together to deliver better services for the people who live in York*
  - b) York's Local Area Agreement, particularly:
    - Modernise the city's economy and increase its competitiveness:
      - Increase the average length of visitor stay by 1% per annum
      - Achieve a target of a 5% increase per annum in tourism earnings
      - Increase the vitality of the city centre – as measured by footfall
    - Widen participation and raise attainment and skills levels throughout the working age population:
      - Increase the number of York residents of working age achieving a first Full Level 2 qualification
      - Increase in the number of Skills for Life qualifications achieved by adults in York

- Develop the contribution of cultural activities, events and festivals to York's economy:
  - % of respondents who see York as "cosmopolitan" and "vibrant".
  - Number of high quality events in the city
  - Number of visits to / usages of local authority funded museums / galleries
- Conserve and enhance the existing environment and special character of the city.
- Enhance the capacity of the voluntary and community sector to make high quality provision through support and development of volunteers
- Improve the quality of and access to local cultural facilities
  - % of residents satisfied with local authority museums and galleries
- Create a diverse programme of cultural and environmental activities, accessible to all, and increase participation in communities with low participation rates
- Help communities become increasingly able to develop and direct their own cultural opportunities
- Raise standards of achievement for children and young people
- Improve enrichment opportunities for children and young people.

c) The Trust's principal objectives:

Vision:

Our Vision is for York Museums Trust to play a major part in positioning York as a world class cultural centre.

Mission:

To cherish the collections, buildings and gardens entrusted to us, presenting and interpreting them as a stimulus for learning, a provocation to curiosity and a source of inspiration and enjoyment for all.

Strategic Objectives:

- To protect and conserve the collections, gardens and building
- To promote access to the collections, gardens and buildings appropriate to the 21st Century
- To create learning opportunities for all and develop innovative programmes springing from the collections, gardens and buildings
- To network and collaborate with partners and contribute to the development of the economic and cultural life of the city and the region
- To raise substantial funds to realise these aims

### Context

- 5 York Museums Trust is now over five years old. The Trust has established itself as a successful independent charitable organisation both within the city and in the

museum sector. The Trust has achieved the core objective of halting the long-term decline in the visitor numbers; indeed numbers have increased by 27% from 394,000 in 2002/03 to 502,000 in 2006/07.

- 6 Significant investments and improvements have been made in both the building fabric and care of the collections. A programme of renewals of the display and interpretation of the collections has also begun. An additional £3.5 million has been raised to date and there is now a long term plan to invest to improve the visitor's experience.
- 7 The Trust's role as the carers of the city's heritage enables it to take an interest in the cultural heritage of the city as a whole for both residents and visitors. There is a will to support and work with the city in its plans to improve the quality of the urban environment and the learning potential for a wide and diverse range of people.
- 8 Increasingly the Trust's work is being carried in partnership with other cultural and educational agencies. This has proved a highly successful way of increasing the Trust's impact in the city. These partners include local, regional national and international bodies.
- 9 The Trust now sees itself as an important agent for change outside of the boundaries that the City's museums have traditionally operated. The vision of York Museums Trust - to play a major part in positioning York as a world class cultural centre - reflects the level of that ambition.
- 10 Over the last five years the context within which the Trust has operated has changed considerably. The Renaissance in the Regions initiative has significantly improved the resourcing of the regional museums. Through this scheme central Government now directly funds a number of the larger museum services in the country. The recent comprehensive spending review has confirmed ongoing support of this national project and the Trust await the final decisions as to the funding of each of the nine regions.
- 11 Certainly the Renaissance project gave a great and necessary boost to YMT in its early years enabling investment in learning, collection management and documentation and the redisplay of the collections. The Trust is in the process of developing a three year plan for Renaissance's further investment in York's museums. The investment is currently around £500k per annum. An important principle of the agreement with government is that Renaissance funding must be truly additional to and not replace local authority funding for museums.
- 12 As YMT has gathered momentum the Trust has been able to operate as a support to the other museums in the region. There have been successful partnership projects with Wakefield and Scarborough with Celebrating Ceramics and a Community Archaeology project with North Yorkshire Archives and again Wakefield and Scarborough which the Trust wishes to continue. The Trust also takes part in the Regional Knowledge Bank and offer support to other museums in a variety of different ways including loans of objects, advice and CPD.

- 13 One of YMT's most important partnerships is the British Museum UK Partnership, of which York is the lead partner for Yorkshire, involving loans of objects, the Portable Antiquities project, exhibitions and joint acquisitions.
- 14 YMT is committed to:
- Working in partnership with National Museums especially the British Museum to bring benefit to York through loans, exhibitions and acquisitions where relevant
  - Developing long standing partnerships with regional museums to share our expertise and collections with as wide an audience as possible
  - Working with the partners in Yorkshire Renaissance (Hull, Bradford, Leeds and Sheffield) to maximise the impact of the investment
- 15 With the Olympics coming to London in 2012 there has been a change in the landscape for all cultural and heritage organisations with the transfer of some of the lottery funding to the event. This is already beginning to have an impact on the sources for capital projects. This is a most significant change for YMT as all of our buildings require substantial investment over the next two decades. However the Trust has a plan for incremental investment across all the sites based on the support from the City of York Council, trusts and foundations, raising our own funding through commercial activity and increased ticket sales.

### **Key Development Areas**

- 16 In order to achieve our objectives, the Trust is constantly reviewing its organisational structure to make sure that it has the right skills. For example, the Trust has recently renewed membership of the Enterprises Board which now has an impressive range of successful experts from the commercial sector helping us to be more effective in making money. One of our greatest assets is the Board of Trustees who have guided us over the last five years. Many Trustees are now coming to the end of their terms and so the Trust has selected new Trustees for their skills and experience. In 2008 the Trust intends to start a process of selection by open advertisement and interview.
- 17 With a view to progressing the St Mary's Abbey project the Trust will be appointing a Head Gardener to lead the development of the gardens. In furtherance of the objective to involve a diverse range of people in the Trust's work it will be expanding the Volunteers Manager role from part time to full time. Both of these positions will be funded through Renaissance in the Regions.
- 18 YMT will continue to work in partnership with individuals who are passionate about York and organisations whose business it is to celebrate and understand the city through the History of York project. Our aim is to deepen everyone's understanding of the importance of the city and its history through the new website and other manifestations such as a book, audio visual, trails etc.
- 19 YMT also have worked with other city partners on festivals such as Illuminating York which again the Trust is committed to continuing. The Trust therefore see our remit covering not only the care and interpretation of the buildings and collections in our care but also the wider cultural life of the city itself.

20 The key development areas within the Trust's portfolio are:

- **St Mary's Abbey**, which includes Yorkshire Museum, the Gardens, York Art Gallery and the Hospitium. The long term plan to open up the whole of the precinct making it accessible through new pathways and interpretation so that people can understand the significance of this unique area involves the following.
- **York Castle Museum** through an incremental year-on-year investment in innovative public displays and facilities.

#### **Principal Partnership Objectives**

21 The Partnership will pursue the following objectives:

a) York's Cultural Quarter

- Work in partnership with other funders and cultural and educational institutions to programme events and activities in the Cultural Quarter
- St Mary's Abbey - create identity; promote Cultural Quarter concept
- Yorkshire Museum - redevelop & redisplay
- Abbey Gardens - increase use and public understanding; create new gardens interpret built heritage
- Hospitium - create vibrant & profitable conference centre
- York Art Gallery - provide varied high-quality exhibition programme; create a masterplan to transform the building, solving the DDA issues and creating new public space following relocation of the Archives

b) Castlegate

- Maximise the existing potential of the Eye of York, Castle Museum, Fairfax House, the river and Clifford's Tower in partnership with English Heritage, the city and other partners
- Castle Museum - invest substantial sums in new public facilities year-on-year to encourage repeat visits; solve DDA issues
- York St Mary's - develop long term strategic uses
- History of York - grow number of brand applications; grow users to 500,000 per annum by 2013

c) Develop new audiences

- Audience Development - increase knowledge of audiences; formalise audience contribution to product development; grow to 850,000 visitors per annum by 2013
- Maintain high user satisfaction
- Continue to create new programmes of events and activities across all sites
- Grow the number of visits by York residents:
  - Carry out market research specifically on the interests of York residents

- Establish a Volunteer Scheme - 1000 members will have participated by 2013
- Produce publicity directed specifically for York residents
- Develop the informal learning public programme
- Develop partnership working with organisations within the city
- Schools & Learning more use by schools through access to collections, web based and outreach & research programme with Universities

### d) The Collections

- Develop a long term plan with the City to improve the long term storage of collections and their access, and the building maintenance with an agreed 20 year building plan, long term loans for capital projects:
  - Create new storage facilities for the Castle Museum Collections
  - Find an alternative storage facility for the material in James Street to improve our control and minimise external risks.
  - Increase storage for the Fine and Decorative Art Collections as part of the redevelopment of York Art Gallery.
  - Resolve the storage of archaeological material excavated from the City of York which is currently housed by York Archaeological Trust.
- Complete retrospective documentation plan.
- Develop and begin a programme of research and publication.

### e) Education strategy

- Develop partnerships with other museums in the region
- Contribute to the regional offer of a comprehensive service to schools
- Continue to develop formal education programmes for 14 to 19 years, HE and FE students: Accessing new parts of the collection
- Build on the offer to less advantaged and hard to reach groups including ethnic minorities, people with disabilities, and special needs
- Develop new workshop programmes and activities to access new parts of the collections
- Develop adult life long learning offers in partnership with existing providers.
- Develop volunteering as, and to deliver, informal learning

### f) The Business Plan

The Partnership will maintain a business plan predicated on the agreed funding to 2013 that has the following objectives:

- The business plan will recognise that the Trust's financial position continues to depend heavily on York Castle Museum. It will be developed to ensure that the public offer at that site is regularly refreshed, particularly whilst major developments take place St Mary's Abbey Precinct.
- The business plan will aim to generate funds which can be transferred to capital from 2008/9 onwards in order to generate match funds for major

capital refurbishment projects and to address the back-log of major repairs required.

- The Trust will seek to retain a level of reserves commensurate with the level of financial risk it faces over the life of the business plan. The target is currently £400k, rising to £500k during the life of this plan.
- YMT will aim to deliver 3% efficiency savings per annum in line with the budget (expectations set for local authorities) which it will reinvest in the service.
- YMT will develop other income streams, in particular through its conference and hospitality business, York Venues, centred on the refurbished Hospitium building.
- Renaissance in the Regions – this national source of funding will continue to support YMT management posts. It also will grow over the next few years to support capital work and other revenue programmes. It is an important condition of this funding that it is additional to core funding and so would be threatened by any reduction in real-terms in the Council's funding of YMT.
- The business plan will be developed in such a way that creates a smooth transition into funding for the period 2013-18. This will be negotiated in the light of resources available to the Council and with the objective of maintaining access to Renaissance funding.
- The Council will continue to make available the existing capital pot (originally £1.8m). The Council will continue to seek ways of making further capital available to YMT through its capital programme, through prudential borrowing facilities and through the Council's Venture Fund

### Services

- 22 The core services that YMT will provide at the Castle Museum, the Art Gallery, and St Mary's Castlegate will be as set out in the respective leases.
- 23 In the case of the Yorkshire Museum and Gardens the respective roles of the Council and YMT are defined by their status under the charitable scheme as Custodian Trustee and Managing Trustee respectively and the heads of terms agreed with the Yorkshire Philosophical Society.

In addition to undertaking the role of managing trustee YMT will undertake to:

- Provide at least 2,534 hours of public opening at the Yorkshire Museum
- Provide free admission to the permanent collections of the Yorkshire Museum for all citizens of the City of York (charges may be applied in the case of temporary or touring exhibitions)
- Use all reasonable endeavours to maintain the existing registration of the Museum Gardens on the Register of Parks and Gardens of Special Historic Interest maintained by English Heritage
- Use all reasonable endeavours to maintain the registration of the gardens as botanical gardens



- Give public access to the gardens daily (except Christmas Day) unless closure is necessary for reasons of public safety. Opening hours will be 7:30 am to 6:00 pm in Winter and 7:30 am to 8:00 pm in Summer
- Permit access to the Museum Gardens for all civic ceremonial and similar events promoted by the Council on up to 10 days in each year provided that the Council give as much notice as is practicable and provided that where the Council requires access at times outside the normal opening hours set out above YMT may restrict (but not prohibit) access for the purpose of maintaining security and/or good estate management
- Insure, with an insurer of repute, third party and property owner's liability risk with a limit of indemnity of at least £10 million in respect of any one occurrence
- Indemnify the Council against any claims, proceedings or demands, and all damages, losses, costs, and expenses incurred arising out of any accident, loss or damage to persons or property occurring in or on the premises of the Yorkshire Museum and Gardens
- Use all reasonable endeavours to keep the premises in good repair, this responsibility to be construed in the light of the relevant clauses in the Transfer Agreement, the condition surveys and the provisions contained in paragraphs 39 – 41 of the Executive report of 26 July 2002 (see the Council's corresponding responsibility below)

In addition to carrying out the role of custodian trustee the Council will undertake to:

- Keep the premises insured with an insurer of repute against the insured risks (i.e. fire, lightning, earthquake, explosion, aircraft (other than hostile aircraft and other aerial devices or articles dropped therefrom, riot, civil commotion, malicious damage, storm or tempest, bursting or overflowing or water tanks, apparatus or pipes, flood, and impact by road vehicles, subsidence, heave, and such other risks as may from time to time be reasonably required by the Council or by YMT) in a sum which in the reasonable opinion of the Council represents the full replacement cost, subject to such uninsured excess as the insurer may properly apply. The Council will deduct the cost of the premium from the annual grant to YMT.

The Council will not be obliged to insure YMT's fixtures and fittings, boilers, lifts, escalators, or other plant and machinery in and exclusively serving the premises. The Council will not be obliged to insure fixtures and fittings that may become part of the premises until YMT has notified the Council in writing of their reinstatement value.

Following damage or destruction by any of the insured risks the Council shall apply the net proceeds of the insurance monies received to the rebuilding or reinstating of the premises.

- In the first instance the Council will retain liability for any major failures to roofs and external walls. Major failures will be defined as those where the cost of the repairs is greater than £25k and which prevent the tenant from reasonably carrying on their business at the premises. All other categories of repair and maintenance will be responsibility of the Trust (see above)

### Review and monitoring

- 24 The procedure will involve:
- a) Twice yearly review of performance between the partners:
    - the Trust will provide performance information as set out above
    - senior managers from the Trust (i.e. the Chief Executive and/or the Director of Finance & Business Development) and the Council (i.e., the “Client Officer” and/or the Assistant Director for Lifelong Learning and Culture) will meet to review performance against the agreed indicators. Meetings will be set a year in advance and will normally be held in April and September
    - YMT will submit a performance report to the Council’s Executive Member in May and October each year. The YMT Chief Executive will attend the meeting to present YMT’s report and respond to any questions
  - b) YMT will provide performance information as requested by the Council to any ad hoc scrutiny reviews conducted by the Council from time to time and attend the relevant meetings to respond to members’ questions
- 25 Within this process information will be provided by the Trust to the Client Officer in the following areas as a minimum:
- 1) achievement of the principal partnership aims set out above
  - 2) visits to each of the Trust’s sites and temporary exhibitions including the number of uses by residents (actual and as a % of all users and segmented into demographic groups)
  - 3) number of hours the collections of the Trust are available to the public during the financial year at each of the sites
  - 4) implementation of agreed capital schemes
  - 5) development of new income streams
  - 6) development of new exhibitions and interpretative services
  - 7) development of collections storage
  - 8) delivery of the education service including the number of school groups using the Trust’s services: (a) actual numbers of all school users, and % as compared to all visits; (b) numbers of local school users and % of total city catchments, and number of local people taking up life-long learning opportunities offered by the Trust
  - 9) number of events/activities where learning forms a substantial component of the activity. Number of adults participating in those activities
  - 10) use and involvement of local people including numbers volunteering
  - 11) engagement with the ward committee process through attendance at committees and articles in ward newsletters
  - 12) achievement of visitor satisfaction (aggregate over the year and by site)
  - 13) level of external investment applied for and secured
  - 14) number of residents consulted through focus groups, surveys and other means including a) young people, b) older people, c) target groups for inclusion

- 15) copies of management accounts
- 16) progress on cataloguing the collections and documentation
- 17) acquisitions and disposals from the collections
- 18) number of uses of the Yorkshire Museums Gardens for activities and events

### **Partnership Arrangements**

- 26 The Council and the Trust will through this partnership ensure the delivery of Best Value and its principles in order to deliver continuous service improvement.
- 27 The Trust and the Council will continue to explore options for further partnerships:-
  - a) the Council being mindful of the potential of the museums and art gallery to provide a positive contribution to its cultural, educational, economic, social and environmental agenda
  - b) the Trust being mindful of the experience and specialist services that the Council can offer
- 28 The Trust will represent the Council on museums issues at international, national, regional and local level and continue to advise members of the Council on museums policy. The Trust will provide this service to the Council without charge provided that the work is broadly in furtherance of the objectives of this partnership. (Otherwise a fee can be negotiated).
- 29 The Trust and the Council together will make every effort to work closely with other museum and heritage providers in the city, ensuring that appropriate forms of liaison are used to encourage the development of strong, inclusive partnerships.
- 30 The Trust will maintain a role in the civic life of the city. It will provide facilities for hosting civic events (subject to operational availability) charging for them at cost. The Council will treat the Trust on same terms as an internal Council department with respect to the use of rooms at the Guildhall.
- 31 The Council and the Trust agree to the application of the 'Nolan principles' (The seven principles of public life) to their operations and the partnership working between the two organisations.
- 32 The following objectives will underpin the conduct of partnership business, to:
  - a) demonstrate responsible governance of the Trust to its principal beneficiaries, the citizens of York, having regard for the extent of funding by the Council
  - b) involve the community in key decisions affecting the objectives, policies and delivery of the services managed by the Trust, making the processes of decision-making as transparent as possible
  - c) work to published standards of collections accessibility and customer care, and to routinely make public the resulting performance attainment
  - d) encourage, and respond to, ideas and suggestions from the community in regard to the display and interpretation of the permanent collections, the subject matter of temporary exhibitions, and the scope of outreach activities
  - e) respond openly and constructively to complaints, demonstrating that they have been adequately investigated

- f) take such steps as are necessary to be satisfied that the Trust is, as far as is reasonably practicable, meeting the expressed aspirations of the community in regard to museum services.
- 33 The partnership will support the governance arrangements set out in the founding legal documents as follows:-
- a) governance of the Trust is overseen by the Board of Trustees, meeting regularly
  - b) the composition of the Board attempts to reflect knowledge and experience of the major activities and responsibilities of the Trust
  - c) community interests are expressly represented by two City of York Councillors being Trustees
  - d) when vacancies occur on the Board, the Trust will seek community candidates for consideration by advertising in local media. The Council will assist in this by advertising for example in the Council newspaper and in Ward Committee newsletters
  - e) the Trust publishes details of trustees appointed, their professional qualifications and experience, and a register of their business and public interests
  - f) below the board, the management of the Trust is vested in the Chief Executive, working within delegated authorities from the Board
  - g) the Chief Executive is supported by a team of senior managers, each responsible for a designated area of activity.
- 34 The following principles will underpin the conduct of business:
- a) the minutes of the meetings are available for inspection on request at each of the three museum / gallery locations, and are made available by the Council using its normal mechanisms [and available on the YMG the web site (when available)]
  - b) strategic plans of principal areas of activity of the Trust, once endorsed by the Board, are also placed on deposit at the Central Library
  - c) other Board papers, unless they are specifically deemed to be confidential, may be inspected by members of the public on request to the Chief Executive's office at St Mary's Lodge
  - d) Board meeting agendas will normally be available for inspection at the three museum / gallery locations and on the YMG the Trust's website in advance of each meeting
  - e) a report of recent business is included in the quarterly CYC newspaper
  - f) the Trust publishes a public Annual Report, and a mid-year performance update
  - g) the AGM is held in public, and details are promulgated in local media
  - h) an annual 'Meet the Trustees' event is held, giving the public the opportunity to question the Board on performance and future plans

- 35 The Trust will also aim to:
- a) establish a number of advisory bodies to work with groups and individuals in specific / specialist areas of activity. Representation from appropriate local groups, etc. will be sought
  - b) develop a consultation strategy which specifically includes seeking the views of young people on specific aspects of the trusts services and future plans
  - c) attend the Council's ward committee meetings on a rolling programme basis
- 36 Public consultation will be carried out on any issue of major public impact. Mechanisms of effective consultation with the public appropriate to the issue in question will be discussed with the Council, who will assist the Trust in carrying out consultation.

### **Role of the Council**

- 37 The Council will:
- Support YMT's vision of positioning York as a world class cultural centre
  - Ensure that YMT's ambitions fit with and are part of the Council's economic development plans
  - Enable YMT to become involved in relevant key strategic partnerships
  - Involve YMT at an appropriate level in City projects of cultural importance
  - Actively support YMT's work to raise investment funding from external sources

### **Principles**

- 38 The Partnership will ensure that the service is operated in accordance with the Museums Association Code of Ethics and will take all necessary steps to maintain the Registered status of the Museums and Gallery, and the Designated status of their collections.

This plan is agreed by:

Signed

---

Name in capitals

---

City of York Council

Date

---

and:

Signed

---

Name in capitals

---

York Museums Trust

Date

---