

Report of the Assistant Director – Governance and ICT

Scrutiny Topic Assessment – York Museums Trust

Purpose of Report

1. This report presents the York Museum Trust scrutiny topic proposed by Councillor Watson together with background information on the formation of the Trust and its performance. To inform the decision on whether or not to proceed with the review, the report recommends the completion of the topic assessment form attached at Annex A.

Background to York Museums Trust

2. In 2002 City of York Council (CYC) entered into a partnership agreement with the newly constituted York Museums Trust (YMT) in order to ensure the long-term stability and prosperity of the City's museums and collections. The background to the decision to create YMT (a company limited by guarantee with charitable status) was:
 - The increasing decline in visitor numbers – an average of 37,000 visits per year lost over the previous ten years
 - The increasing gap between income and expenditure with the service costing an extra £120k every year
 - A large backlog of inadequately catalogued objects and poor storage conditions
 - Buildings requiring extensive maintenance and upgrading, including the need to make them accessible
 - A need to modernise the display methods at all sites
 - A need to improve the effectiveness of the management of the service
3. The Council's decision to place the museums in the hands of an independent entity was made explicitly to achieve business

turnaround, and in this respect the arrangement has been very successful.

4. In December 2007, YMT and CYC entered into a Partnership Delivery Plan (PDP) plan covering year's five to ten of the Trust (2008–13) – see Annex B. This set out the respective objectives of CYC and YMT and where they overlap, and the key outcomes that YMT is accountable for delivering, as follows:
 - a) Stabilising visitor figures
 - b) Delivering new income streams
 - c) Creating new exhibitions and interpretative services
 - d) Creating an education strategy
 - e) Increasing use and involvement by residents
 - f) Achieving high visitor satisfaction
 - g) Cataloguing of the collection
5. The way the trust functions is governed by its status as a charity. As such, YMT is regulated by the Charity Commission. Charities must be able to demonstrate that the activities they carry out in pursuance of their charitable purposes are for the benefit of the public. A charity must not provide disproportionate levels of private benefit to any particular group or person. The Charity Commission has given guidance on assessing the public benefit of charities and trustees must have regard to that guidance.
6. For a body to be a Charity it must be independent. It cannot exist as a body for promoting the policies of the Council and cannot act under its direction. The relationship between CYC and YMT is also regulated by a range of legal agreements entered into at the time of the transfer. These include the transfer agreement, leases of the various buildings, and the collections management agreement.
7. The Council makes an annual grant to YMT. It has received stable funding since 2002 with inflation uplifts. In 2010/11 the grant was £1,506,710. The current financial arrangements have been agreed to 2013.
8. YMT report back in great detail twice a year to this Overview & Scrutiny Committee in the person of the Chief Executive. In terms of the museums activities, this level of detailed reporting to members is unprecedented. Because of this members have far more detail about the decisions, plans, and activities of the service than ever before, and far more information than they received when the Council managed the museums itself.

Background to the Proposed Review

9. In September 2011 this Committee received YMT's 2010/11 year end performance report with particular emphasis on the second half of the year. The report detailed YMT's achievements against the key targets highlighted in paragraph 4 above, as follows:
- *Stabilising visitor figures:* Visitor numbers have risen from 387,000 in the first full year of operation to 641,000 in 2010/11 (which included a period of 4 months when the Yorkshire Museum was shut for refurbishment).
 - *Delivering new income streams:* YMT has increased the diversity of their income streams and their overall income. In 2002 the Council's grant accounted for over 50% of YMT's income; in 2011 it has reduced to less than 30% of income with admission charges, *Renaissance in the Region* funding, and other trading income making up the remainder.
 - *Developing new exhibitions and interpretive service:* There is now an excellent programme of activities at all the sites managed by the Trust. Partnerships with the Arts Council: England, The Tate and the British Museum have not only brought the best of national collections to York but have also shown York's collections regionally and nationally. The Trust's learning support team have won awards and plaudits for their interpretation and informal learning programme. The Trust contributes to wider city initiatives including Illuminating York and the Viking Festival and in 2012 it is one of the partners delivering the York Mystery Plays.
 - *Upgrade the building assets:* YMT has so far raised approximately £7m which it has invested in the Council's buildings, gardens, and collections.
 - *Increase use and involvement by residents:* Visits by York residents, free of charge, reached 112,000 last year. Of this figure 6,000 were from York school children from over 50 state and independent sector schools. A volunteer programme introduced in 2009 has over 200 active volunteers and working with the H.E. sector the trust hosts over 20 student placements annually. They have an active inclusivity programme supported by the Joseph Rowntree Foundation, Arts Council: England and renaissance in the regions.

- *Achieve high visitor satisfaction:* The Trust has successfully retained the Visitor Quality Assurance standard and their own visitor survey show that visitor satisfaction is consistently above 96% with an average 98% of visitors willing to recommend the visit to others.
 - *Ensure the cataloguing of the collections:* The agreed programme of retrospective documentation is on target. The Trust team has also developed an acquisitions programme to reflect the history, science and culture of the city and region.
10. In regard to the collections, which are of national and international importance, Cllr Watson (topic registree) has queried the progress being made in cataloguing them, in light of the reduced number of curators which remain in post following redundancies at the Museums. As part of his proposed review, Cllr Watson wants to seek reassurance that the appropriate qualified curatorial staff have been retained to preserve, protect, interpret and maintain public access to the Council's collections.
 11. Cllr Watson will be in attendance at the meeting and would welcome the opportunity to discuss all of his concerns, and to register his support of this topic proceeding to full scrutiny review.

Options

12. Having considered all of the information contained within this report and its annexes, and to assist in deciding whether or not to proceed with the review, Members are asked to complete the Assessment Form at Annex A.
13. If Members decide to proceed with the review, Members may choose to:
 - carry out the review as a full committee or create a Task Group of Committee members to complete the review on their behalf
 - identify a suitable remit for the review by agreeing a suitable aim and a number of objectives
 - Agree an appropriate time to start the review bearing in mind their ongoing work and the other review work currently programmed for this municipal year.

14. Alternatively, Members may decide that in order to make an informed decision on whether or not to proceed with the review, further information is required in relation to the concerns raised by Cllr Watson. Therefore the Committee may choose to request that a further report be brought to their next meeting.
15. The last option available to Members having considered all the information presented at this meeting, is not to proceed with the review.

Council Plan

16. The success of YMT's business plan contributes to the council's priority to create jobs and grow the economy, through its investment in the tourism infrastructure. It also provides opportunities for learning, for young people across the city.

Risk Management

17. It may be advisable to investigate further the concerns of Cllr Watson identified in this report or at the meeting before deciding whether or not to proceed with the review. For example, if a decision is taken not to proceed with this review, and the concerns of Cllr Watson about the collections (as outlined in paragraph 10 above) prove to be correct, there is a risk to the council that the cataloguing of those collections may not be completed in line with the Partnership Delivery Plan.

Recommendations

18. Having considered the information provided within this report, the Learning & Culture Overview & Scrutiny Committee are recommended to:
 - a) Complete the Assessment form at Annex A;
 - b) Agree whether they have all the necessary information to make an informed decision on whether or not to proceed with the review
19. If a decision is taken to go ahead with the review, Members are recommended to:
 - i. Create a Task Group to carry out the review on their behalf, to enable the full committee to continue with the scrutiny reviews already identified for this municipal year

- ii. Agree a review remit with a number of objectives
- iii. Programme the review into the committee's workplan and identify a timeframe for the review's completion.

Reason: To ensure compliance with scrutiny procedures, protocols and workplans.

Contact Details

Author:

Melanie Carr
Scrutiny Officer
Scrutiny Services
Tel No. 01904 552063

Chief Officer Responsible for the report:

Andrew Docherty
Head of Civic, Democratic & Legal Services

Scoping Report Approved



Date

17 Nov 2011

Specialist Implications Officer(s)

Wards Affected:

All



For further information please contact the author of the report

Background Papers:

York Museums Trust Partnership Delivery Plan – 2010/11 End of Year
Performance Update Report - September 2011

Annexes:

Annex A – Topic Assessment Form

Annex B – Partnership Delivery Plan 2008-13