

## **York Museums Trust Scrutiny Review – Interim Report**

### **Summary**

1. This report provides an update on the ongoing scrutiny review of York Museums Trust, and asks the Committee to agree a method for progressing the review and a timeframe for its completion.

### **Background to the Formation of York Museums Trust**

2. In 2002 City of York Council 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 need to turnaround the business performance of the museums which had been losing an average of 37,000 visits every year over the previous ten years and were costing an extra £120k each year.
3. In July 2002, the Executive agreed to transfer operation of the museum service to the York Museums and Gallery Trust (YMT). By that date, YMT had already been formed, by a group of York citizens, as a company limited by guarantee with charitable status, governed by a board of trustees comprising a chair and ten to twelve members including two Councillors, a nominee of the Yorkshire Philosophical Society (YPS), and an individual nominated by the unions in consultation with the staff. YMT also has a trading company which covenants all profits back to the parent charity.
4. The key principles of the transfer were:
  - YMT would manage the Art Gallery, Castle Museum, St Mary's Church, and the Yorkshire Museum and Gardens.
  - The Council would retain ownership of the buildings and collections. It would loan these to YMT through formal agreements. In the case of those assets that are subject to existing trust deeds the Council would be the custodian trustee and YMT the managing trustee.
  - TUPE would apply to the transfer of staff.

- YMT would continue to provide the residents of York with free entry to the main collections.
  - Agreements between the Council and YMT would ensure that the Council's expectations and outcomes would be met.
5. The key agreements that govern the legal relationship between YMT and the Council are as follows:
  6. **The Memorandum of Association** describes the Trust, its reasons for existing and its charitable objects. It is based on a standard model and is intentionally broad in order to give the Trust all necessary powers to be able to function as an independent organisation.
  7. **The Articles of Association** prescribes how YMT operates as an organisation. With regard to the appointment of trustees, they state that in every notice for an annual general meeting, the Board shall set out its requirements for the skills, qualities and experience which it needs from its members. The notice shall state the extent to which those requirements are met by those Trustees continuing in office and those retiring and intending to re-offer themselves for election.
  8. In exercising their powers to nominate, appoint, reappoint, elect, re-elect, approve and dismiss Trustees, both the members and trustees shall seek to ensure that the Board of Trustees is representative of the local community and users of the services and facilities offered by the Company, and also comprises persons with a broad range of skills who are likely to contribute to the Company's success. The specific way that YMT would carry out its business was also covered in a Partnership Delivery Plan (PDP). In 2005 the PDP was updated. The current PDP (shown at Annex A) sets out what YMT and the Council have agreed will be delivered, the targets YMT will reach and the reporting arrangements.
  9. **The Funding Agreement** sets out how the Council funds the Trust.
  10. **The Transfer Agreement** formally transferred to YMT the activity of providing museum and gallery services together with the staff and the assets.
  11. **The Leases**- Separate leases were agreed in respect of the Art Gallery, the Castle Museum, St Mary's Castlegate Church, the Fulford Cross store and the Birch Park store. The term was originally for 25 years from 1 August, 2002 and the rent was a peppercorn. However, when the YMT applied for Heritage Lottery Funding the HLF insisted on a longer term of lease so members agreed 35 year leases. A licence was granted for the Darnborough Street store which was subsequently surrendered by YMT. YMT subsequently entered into a lease in its own right for the James Street store.

12. **The Collections Loan Agreement** provides for a loan period of 25 years and sets out the Trust's obligations. Although the leases were changed to 35 years, the collections loan agreement remained at 25 years. In reality this only really affects the Art Gallery collection because the Yorkshire Museum collection is part of the Yorkshire Museum and Gardens Charity and the Castle Museum collection is part of the Kirk Deed. A collections management protocol forms a schedule of the Funding Agreement and sets out how the collections are to be managed. YMT collects only on behalf of the Council. In 2005, YMT drafted an Acquisition and Disposal policy for 2005-6 which was meant to be replaced in 2006 with a more considered policy. As yet, this work has not been undertaken and the temporary policy remains in place.
13. **The Scheme for the Yorkshire Museum and Gardens Charity:** The Yorkshire Museum and Gardens were originally owned and operated by the Yorkshire Philosophical Society (YPS). In 1960 the YPS formed a charity, the Yorkshire Museum and Gardens Charity, vesting the assets to York City Council as sole trustee. The scheme governing the charity provided for the Council to administer the assets but gave the YPS a significant oversight role within the management arrangements. Trusteeship subsequently passed to North Yorkshire County Council. When it returned to City of York Council (CYC) in 1996, the Council attempted to fulfil the terms of the scheme through its newly formed, unified museums service. This caused significant tension with the YPS. It was clear that a new scheme was needed.
14. Once YMT was up and running a new scheme for the Yorkshire Museum and Gardens Charity became imperative. Unfortunately it took 7 years to negotiate this new scheme with the YPS and the Charity Commission during which time YMT had to operate the assets under a licence from CYC.
15. Under the new scheme the Yorkshire Museum and Gardens Charity forms part of York Museums Trust for the purposes of registration and accounting. This means that YMT only have to file a single set of accounts rather than a separate set for YMT and the Yorkshire Museum and Gardens Charity respectively.
16. **The Kirk Deed:** The Charity Commission required this be updated and therefore a revised version has been in place since 9 October 2009.

### **Background to Review**

17. In November 2011, this Committee received a topic assessment report for a scrutiny topic proposed by Councillor Watson, together with the background information above on the formation of the Trust and its performance.

18. In January 2012, the Committee received a further briefing paper providing information on the Trust's relationship with the council and the structures in place, and the original Executive report from July 2002 setting out the purpose of the Trust.
19. Based on the information provided at both those meetings, Members agreed it would not be appropriate to scrutinise the work of the Trust and their internal processes as suggested in Cllr Watson's topic registration form. However, having taken into account all the information, Members agreed to proceed with a scrutiny review based on the following remit:
- 'To determine whether YMT have achieved appropriate collections management standards in line with the Collections Loan Agreement and Collections Management Protocol agreed in 2002'.*
20. In March 2012, the Committee received information and a presentation from the Commercial Director at York Museums Trust which identified that:
- CYC is a custodian trustee and YMT is a managing trustee for most but not all of the collections. In the case of the Art Gallery collections they simply belong to CYC and are loaned to YMT.
  - There are over 1.5 million objects in the hugely varied collections
  - The different collections require different types of care. Some collections will naturally decay over time e.g. the biological collection. These require specialist care to delay their decay. Other collection types will retain their current condition if stored and displayed in an appropriate manner.
  - YMT have set themselves a number of priorities:
    - a. To store the collections in an appropriate environment and manner
    - b. To document each collection
    - c. To develop each collection
21. As part of their review, the Committee agreed to look at YMT's progress in achieving the above priorities

### **Information Gathered**

#### **a) Storage**

22. The Committee agreed a Task Group of Cllr Watson, Cllr Fitzpatrick and Cllr Taylor to carry out a visit to view the storage facilities at the Castle Museum, Yorkshire Museum and Art Gallery, and at YMT's four external



sites, in order to assess the conditions in which the collections were being kept.

23. In 2002, the storage facilities required urgent attention due to the poor conditions many of the collections were being stored in on-site. Many have subsequently been re-homed in modern storage facilities at external sites around the city.
24. On 18 April 2012, the Task Group were given a tour of the storage facilities at the Castle Museum, Art Gallery and Yorkshire Museum by the Head of Collections Management who has been in post for the past seven years and has seen the improvements put in place by YMT during that time.
25. Castle Museum  
The Task Group was shown the numerous collections stored on-site:
  - Decorative Arts – stored in built-in locked wooden cupboards along a staff corridor (some tissue wrapped for additional protection), with larger pieces stored on high shelves above the cupboards covered in cloth.
  - Special Ceramics - stored in a locked room off a public corridor. Within the room, items are stored in locked modern storage cupboards with Perspex in the doors. These cupboards were fairly expensive but ideal for purpose as the contents can be easily identified without the need to unlock/open the cupboards. Other large and unusually shaped items e.g. decorative glass walking canes were laid on cloth covered table tops, and other smaller items were stored in coded boxes.
  - Military (Uniforms, Accessories & Weapons) – stored in number of adjoining rooms, accessed via a locked door off a public corridor. Room 1 containing swords and sabres stored on purpose built racks. Room 2 contained military uniforms hung from rails (Crimean war through to World War II). Room 3 was a box store for accessories (boxes coded to assist in identification of contents). Room 4, accessed via a locked metal door marked 'Explosives' behind which was a locked metal gate, contained handguns, muskets, machine guns, cannon balls etc. The handguns were laid in wooden drawer units and the larger firearms stored on racks.
  - Scientific instruments - the Task Group was shown where a mezzanine level above a staff corridor behind Kirkgate had previously existed, on which the collection had been stored. The only access to the storage space had been via a pull-down ladder which was far from ideal. However the collection had recently been moved to allow the

mezzanine level to be removed and the staff corridor to be re-designed to become a new back alley display as part of the Kirkgate exhibition.

26. Members acknowledged the serious logistical exercise to move the collections in and out of storage based on the programme of planned exhibitions. They recognised the difficulties of carrying out that process, particularly before the introduction of purpose built external storage facilities when more had been stored at the museum in cramped conditions.

27. Art Gallery

As part of their tour of the Art Gallery's storage facilities, the Task Group received information on YMT's forthcoming reconfiguration of the Art Gallery which had been planned in order to address some of the building's limitations. For example:

- The picture store - the room contained over 1000 easel paintings stored in racks based on theme and size, with protective rubber sheeting between frames. The room also contained packing crates used to transport pieces borrowed by the Art Gallery or lent out. The Task Group learnt that pictures have continued to be stored in that room even though it is not ideal, due to the huge air handling units in situ. YMT acknowledged that although that provided a suitable environment in regard to temperature and humidity, it was not ideal due to the possibility of water damage to the art work should the machinery break. The Task Group was informed that the opportunity to improve the current situation would come as part of the planned re-configuration of the art gallery when the machinery is due to be repositioned on the roof of the building. The plan also includes the installation of a new racking system to allow better access to the easel paintings.
- Upstairs store room - containing 15,000+ works on paper stored in 252 boxes, together with a wall full of book shelves for reference books etc. A lot of the works on paper being stored are topographical by both local and nationally known artists. The contents of each box are stored based on subject e.g. Bootham Bar and the individual pieces are separated by tissue paper. Individual pieces are put on display to complement the exhibited themes on display in the Art Gallery.
- Studio Ceramics - the Task Group learnt that YMT holds the best collection of studio ceramics outside of the V&A, but they do not currently have enough space in the museums to display it all. As part of the Art Gallery re-configuration, the plan is to have a large room on the first floor where the whole Decorative Arts collection can be displayed together.

- Social History store - also due to be improved as part of the Art Gallery re-configuration.

## 28. Yorkshire Museum

The Task Group visited two store rooms in the basement accessed via a staff only area:

- Geology Room - containing racking for large pieces and wooden cabinets / drawer units containing small more fragile pieces, protected by foam surrounds.
- Archaeology Room – containing metal shelving units used to store mostly geology pieces now. Items stored in boxes and wooden drawer units.

29. Both rooms were monitored for temperature and humidity with a Curators work area between the two rooms which had previously also been used for storage before the transfer of some of the archaeological collection to the external storage facility at Birch Park.

30. The Task Group were also informed of a High Security Room where Bronze and Iron Age jewels and coins were stored.

31. The Task Group noted there was no sprinkler system fitted at the Art Gallery due to the damage water would cause to the art work on display and in storage. Instead there were fire extinguishers positioned around the building which if needed, would be used with extreme care in order to prevent/limit damage to the art work where ever possible.

32. Many of the items held by YMT are referenced in national research which helps build up their worth and the Museums' standing within the Museum world. The Task Group were informed that it is common practice within the museum world not to take out insurance for collections held by the owning museum, basically because most items would be considered priceless as they could not be replaced if damaged/ruined. However, it is common practice for Museums to insure pieces they are borrowing from others in case they are damaged whilst in their possession or in transit. There is also Government indemnity for borrowed items although national security standards must be met to receive that indemnity.

## 33. External Storage Facilities

On 24 April 2012, the Task Group toured the four external storage sites used by YMT. They were informed that all the items moved from the Museums out into external storage, had been documented first. They also noted that:

- a) The buildings at each of the external sites were alarmed and there was no signage to indicate their ownership and/or what they are being used to store.
- b) YMT employed a collections cleaner who regularly visited all of the external sites to carry out housekeeping to prevent/delay deterioration of the stored items (hoovering and dusting at both Birch Park and James Street and sweeping pathways clear at the other sites).
- c) YMT staff regularly checked for signs of infestation - special care was taken to identify wood worm etc so that it could be treated. Pest traps were set and the presence of beetles and moths was monitored. Also, YMT fumigated and/or froze items where appropriate, before putting them in storage.

34. James Street External Storage Site

Built in the late 1980s, James Street is the main repository of the Castle Museum, and considered by YMT to be a well performing store. It provided a nice environment (no damp and some heating) to store pieces from the social history collections previously stored at the Castle Museum. The main storage space contained a mezzanine level to make the most of the space within the unit. Items were organised and stored in social history categories e.g. personal life, work life etc. There was a hanging store for costumes and textiles and some were stored in large boxes stacked on shelves. There were also some bicycles and many pieces of furniture, some of which appeared to be in a state unsuitable for display e.g. a chaise longue with ripped upholstery.

35. Riccall Grange External Storage Site

There were 4 purpose built storage units occupied by YMT at Riccall Grange. The facilities were used by YMT as a deep storage facility for items unlikely to be put on display and for large items which had previously been stored elsewhere.

36. The units were big and the conditions good. The first two units had background heating to prevent frost, and was partly racked out with steel shelving. They were being used to store finer large pieces from the Castle Museum e.g.:

- A Butchers Wagon (Cross Purveyors) donated by Cross family who have the butchers shop in the Market.
- A steam fire engine and a number of fire tenders

- A number of marble fire surrounds
- A selection of hand tools
- An old motor vehicle
- A 1897 steam car
- The world famous traditional gypsy caravan which used to be on display in the 1960s gallery at the Castle Museum and has now been in storage for 3yrs



- A large printing press and pieces of old shop fittings and internal fittings from a bank, left over from fitting out Kirkgate, in the Castle Museum

37. Most of the items were covered to keep them as dust free as possible. They have an issue with cluster flies at the site due to its countryside location, but thankfully they don't eat into things, but it does result in a lot of dead flies.



38. The other two units had no heating and had been fitted out with 6m high racking. The units contained items from the Yorkshire Museum and the hutments (behind the Art Gallery) e.g.:



- A number of sarcophagi
- A roman oven
- Large pieces of stone from St Marys Abbey
- A gravestone for a local Major's horse



39. Some of the items weighed 1-2 tonnes and needed placing in situ by forklift.

40. The Task group noted there was room to store much more out at Riccall Grange, and were pleased to hear that YMT planned to move more items out there from Birch Park to enable better use of that more centrally located storage site.

41. Birch Park External Storage Site

Built in the late 1980s, Birch Park was being used to store items from the Yorkshire Museum's archaeological and natural science collections. The natural science pieces were stored in large walk-in wooden boxes. The individual items were either boxed or in small display cases, stored on roller racking e.g.:

- |                        |                              |
|------------------------|------------------------------|
| • Dinosaur bones       | • Stuffed animals            |
| • Bird skeletons       | • Remains of extinct species |
| • Butterflies & shells |                              |

42. Above the wooden boxes on a mezzanine level, the Task Group were shown a large storage area with racking containing large pieces of stone. The weight of the stone was an issue and so YMT had already shipped some of the larger pieces out to Riccall Grange. All of the stone except for around 200 North Yorkshire pieces had come from buildings / sites across the city e.g.:



- St Mary's Abbey
- A roman archway
- The Minster



43. The Task Group learnt that work was continuing to sort the items and to move some of the less impressive pieces out to Riccall Grange. YMT felt this would provide them with sufficient space to reconstruct some of the building parts e.g. the roman archway, so that they were available to view and more accessible to researchers etc.

44. There was also shelving for Roman, Medieval and Saxon pottery e.g. bowls, jars, urns etc.



44. And drawer units containing Neolithic pieces e.g. hand axes, inlaid in to foam surrounds for their protection.



45. Elsewhere in the unit on the first floor, there was a large room containing the remaining pieces of the Gordon Baldwin collection (currently being exhibited at the Art Gallery), together with other large ceramic pieces.





46. There were also a significant number of boxes containing pieces waiting to be recorded.



47. On the ground floor, there were a number of smaller rooms containing pieces from the Decorative Arts Collection stored in metal cupboards with Perspex doors to enable easy viewing of the contents. The pieces had all been documented and the shelves were labelled.

48. Fulford Cross External Storage Site

The Council bought the site in the 1970s with the intention of extending the Castle Museum experience by shipping visitors down the river to the site to visit an outdoor venue where large pieces could be put on display. This idea never came to fruition, but the Council retained the site for use as an external store. The Task Group found the building to be run down. Made of asbestos-like material with a corrugated roof, the Task Group were informed that the roof and building were not waterproof, and that rain runs down the slope of the land leading to the building and under the door. For that reason stored items have tended to be sat on pallets to provide some protection from the water. To date, the building has never been affected by the river flooding.

49. Before their visit, the Task Group was informed that the store was only used to keep robust pieces such as agricultural equipment and other large/ industrial pieces.





50. However on inspection, the Task Group was surprised at some of the contents stored there. For example:

- Shop fittings
- A triumph car



- Wooden furniture
- 3-piece suite
- A wheelchair & Perambulator

- A Hearse
- Ornate railings & lampposts



- A collection of bicycles
- A number of handcarts & horse-drawn carts

51. Although there were two walk-in wooden boxes providing some protection from the elements for a minimal number of small items, the Task Group noted that most of the items in store at Fulford Cross were unprotected and nothing had been done to delay their further decay.



## b) Documentation

52. At the meeting in March 2012, the Commercial Director provided information on the Documentation Plan. The Committee noted that the plan contained an official estimate of the time required to carry out full documentation of the collections, of 170yrs. Also that YMT set annual targets to progress this work. *The Task Group have requested information on the specific targets set by YMT and the progress they have made against them.*
53. During their tours, the Task Group learnt that the fine art collection and most of the archaeology and science collections are now documented. Whereas, the Social History collection is so large and varied it remains a challenge. A revised plan on how long it will take to document the social history collection is being drawn up for the Arts Council re-accreditation process, with a deadline of 2013.
54. On their visit to the Castle Museum, the Task Group learnt that cataloguing is not necessarily done by collection - sometimes it is project based. In the case of the decorative arts collection, a record of the contents of each store cupboard is kept. As and when individual items are taken from the cupboards for use in specific displays e.g. wine glasses on a dining table setting in a Victorian room, YMT catalogue everything used in the display. Over time through this approach, the cataloguing of a collection grows. If items are missing from the cupboard the next time the contents are checked, they are marked down as not present on that specific date. Cataloguing is checked against previous



records and auditors make random checks. This method of cataloguing and recording is commonplace within the Museum world.

55. The Task Group were reassured to learn that in November 2011, Veritau (internal audit service) looked at the issues around documenting the collections and gave substantial assurance that the right controls and working methods etc were in place, and were good. *The Task Group have asked to see the Veritau report.*
56. Three quarters of the collections are now represented on the YMT database system. YMT's aim is to make all the existing data available to the public including, allowing digital access. Funding has been sourced to make this happen. The Task Group was informed that all the curators are involved in the documentation work and some of the collections assistants have previously been. Plans for the future include involving the volunteers (50/60 volunteers) in that work.
57. The Task group learnt that at Birch Park, YMT welcomed help from students and volunteers to record, number, photograph and repack collection pieces, and placements for 15/16 yr olds were being offered through schools.

### **c) Development of the Collections**

58. Throughout their tours, the Task Group learnt how the various collections have continued to grow through donations and YMT purchases. Also, that each collection has a specific collecting policy. For example:
  - The firearms collection has been added to through gun amnesties. Police advise Museums of the weapons handed in, and Museums can then request specific pieces to add to their collection.
  - Bequests from local families - In some cases a particularly fine piece of furniture will be bequeathed by a family to the Museum together with a number of other pieces. In the past, it has been common practice for YMT to accept a bequest in total, in order to attain the fine piece but this has left them with the problem of storing the rest. Over time, this has contributed to the storage problems outlined in paragraphs 34 & 49 above, and paragraphs 59-62 below.
  - When an old (traditionally fitted out) shop has closed down, the museum has taken the opportunity where appropriate to acquire stock and the shop fittings for future use within the Kirkgate display at the Castle Museum. The shoe shop display in Kirkgate was created in this way. However, the storage of such items prior to them being brought

back into use remains an issue, as detailed in the analysis section below.

- Excavations in and around the city also add to the collections. For example, the Hungate excavation is expected to provide a number of items which if suitable, may be added to the archaeological collections.

#### 59. Education

During their tours, the Task Group received information on the educational provision provided by YMT at Birch Park and of their plans to provide more opportunities for visitors to access Birch Park. Currently researchers can visit the store and YMT are involved in a joint piece of work with English Heritage and DAT. However, YMT would like to increase their offer to schools and local history groups so that they can visit the store to view and learn about the collections. This would become easier to facilitate once more items have been documented and moved. YMT made no charge for the viewing of items in storage for educational purposes

### **Analysis**

60. Having visited all of the storage sites, the Task Group identified a number of issues for further investigation.

#### 61. Limited Free Storage Space

The Task Group recognised there was little available storage space at the Museums, Art Gallery, Birch Park, James Street and Fulford Cross. They therefore queried whether there had previously been other storage sites used by YMT which had since been disposed of either by themselves or the Council, and the reasons for their disposal.

62. They learnt that there were several other stores that had come to YMT when it was formed, which had subsequently been deemed unsuitable for use. These were:

- An old maltings building on Darnbrough Street - used to store material very much like that at Fulford. It had only ever been a temporary store (taken on originally by the Castle Museum) and was let to YMT on a short-term licence. The building was in a very poor and unsecure state with birds getting in, and so YMT decided to clear it. Some of the objects at Fulford came from Darnbrough Street at that time. The Council covered YMT's removal costs when it was vacated during 2006/7 because the then Housing Department required its return.

- A couple of storage containers – They were cleared at the same time as Darnbrough Street with the collections moving to James Street. Those units were expensive to rent and impractical as YMT had to pay a fee each time they wanted to access to the contents. *The Task Group have asked where the containers were located and how long they were rented for.*
- Marygate Annexe - This was cleared of archaeology objects at the end of 2011. The building was in a very poor state (repeated acts of vandalism and unauthorised access) and the collections and staff that looked after them were both deemed at risk.
- St Marys lodge – Used to store the biology boxes now stored at Birch Park. The basement rooms where the boxes had been stored were very damp and the conditions were unsuitable for the type of material, especially over winter. Access for staff and researchers was also very limited.

63. Fulford Cross is therefore the last of the inherited poor stores for YMT to tackle.

64. Poor Condition of Some Stored Items

The Task group noted there were many items stored at the external storage sites that were unlikely to ever go out on display due to their poor condition. For example, at James Street there were many pieces of furniture which were in a dilapidated state and not fit for display e.g. a chaise longue with ripped upholstery. YMT confirmed they would not choose to repair such items as the use of the materials available today, would de-value the items and make them unsuitable for display. The Task Group recognised that at some point YMT would need to decide whether those items should remain in storage or should be disposed of.

65. Based on what they saw at Fulford Cross, the Task Group agreed that the items stored there would definitely have decayed less quickly had they been stored elsewhere. Or, if the same care had been applied as they had witnessed at the other storage sites e.g. bubble wrapping, protection from the weather, temperature controlled etc. For example, they learnt that some internal wooden shop fittings recently placed in storage at Fulford Cross had been brought back out and reconfigured for use in the new chemist shop within the extended Kirkgate exhibition. The Task Group recognised that this would not have been possible had those fittings been in storage at Fulford Cross for any length of time, due to the adverse effects of the poor conditions.

66. The Task Group questioned the decision making process for deciding which items should be stored at Fulford Cross and therefore left

unprotected. Having expressed their concern about this, the Task Group agreed that in their view, a majority of the items at Fulford Cross were now unfit for future display e.g. the vehicles, carts, bicycles, pieces of wooden furniture, a 3-piece suite etc. They therefore agreed that consideration should be given to disposing of many of the items at Fulford Cross and some of those at James Street, because they were now unfit for display (technically referred to as 'de-accessioning'). This would free up space to allow the remaining items to be better protected and stored at Fulford Cross, and make the process of cataloguing the collections easier.

67. De-accessioning Collection Items

The Task group learnt of the national guidelines for de-accessioning which YMT follow i.e. a Curator suggests a suitable item for de-accessioning which is considered by the full team of curators. If they agree, they make a proposal to the YMT Directors, who in turn if they agree, propose items for de-accessioning to the Trustees. To facilitate this process YMT use a disposal request form which the curator with the specific knowledge of the collection completes for each suggested disposal, and which form the basis of discussion at the team meetings. These are used as the formal record of the reasons for disposal and are signed off at the meeting and form the record of the decision to pass the disposal forward. When a decision is taken to dispose of an item, YMT always photograph and record the item first.

68. The Task group noted that as Managing Trustee, YMT does not have to ask permission to de-accession items and all record keeping concerning the collections and the disposal of specific items is their responsibility. However, they do notify the council of disposals as part of their general performance reporting. The council does not keep a separate record of disposed items, although the Assistant Director for Communities, Culture and Public Realm has confirmed that there have been very few notifications received.

69. The Task Group therefore requested details on any items that have been through the de-accessioning process outlined in paragraph 67 above, and were informed of 279 items disposed of since 2003 – see detailed information shown at Annex C. *The Task Group have asked for clarification on whether the items listed in Annex C were sold or given away, and for information on any items that have not made it through the full de-accessioning process.*

70. The Task Group also noted that the current Acquisition and Disposal policy drafted by YMT in 2005 was only created for use on a temporary basis until such time as a more considered policy could be produced (as referred to in paragraph 12 above). In acknowledging that this piece of

work is long overdue, YMT have indicated they will not be able to resource undertaking this policy review work until autumn 2012.

71. Responding to the Remit for the Review

Finally, in order to start to determine whether YMT have achieved appropriate collections management standards in line with the Collections Loan Agreement and Collections Management Protocol agreed in 2002 (in line with the remit for the review), and bearing in mind that it has been 10 years since the Agreement and Protocol was agreed, the Task Group felt it would be useful to know whether YMT believed there have been any other factors during that time which may have contributed to limiting their progress made on achieving the collections management standards detailed in the Agreement and Protocol, and/or achieving their priorities listed at paragraph 20 above.

72. In response, YMT confirmed:

- Storage:
  - They had made two applications to the Heritage Lottery Fund between 2005-2007 for large scale storage projects which would have enabled the building of another unit on the land around Birch Park, thereby doubling their storage allowing the collections stores at the museum sites to be cleared and their other off site stores to be rationalised. Unfortunately, both bids were unsuccessful. YMT acknowledge it is usually difficult or near impossible to get grant aid for storage projects so they have had to take the approach of funding solutions themselves, which has meant they have had to phase developments and make them on a scale they can afford to finance, rather than going for one big fix.
  - As part of the forthcoming 1914-1918 project at the Castle Museum, YMT will be seeking alternative off site storage for the other collections to open up the top floor and this is likely to be another rented unit.
  - Improvements to the storage of the Fine and Decorative Arts collections at the Art Gallery will be achieved as part of the planned redevelopment of the site in 2013-2015. YMT have included a rationalisation plan for assessing and reducing the amount of bulk archaeology in store in their forward plan for 2013-2018 which will relieve pressure on Birch Park and create space to allow them to take in material currently with YAT.
- Retrospective Documentation:
  - Their first five year plan for 2005-2010 saw the Art Gallery almost completed and the software improved and updated. They

now have a couple of years of project focussed work with the developments at the Art Gallery and Castle Museum. YMT intend to submit another 5 year plan when they re-apply for Accreditation in spring 2014. Accreditation is a national scheme now administered by the Arts Council which looks at the way museums and galleries are run and the standard of the activities they do (how they look after their collections, the learning provision and the services they offer visitors). *The Task Group have asked for more detailed information on the standards required to achieve the national accreditation referred to above.*

- In terms of collections management, Accreditation means YMT have to have certain policies and procedures in place and their curators need to work to certain standards which are the same in all museums across the country. YMT have met those standards in the two reviews held since the Trust was formed, which is a considerable achievement, bearing in mind the Trust took over three very different institutions whose practises in collections management varied. At the time, none of the three were operating at the standard required for Accreditation and there was considerable work to be done during 2002-2005 to bring those standards and procedures into place before the first application for Accreditation was made in summer 2005. *The Task Group have asked for further information on the standards that curators have to work to (as referred to above), and the findings from the two reviews held since the Trust was formed.*

## **Review Conclusions To Date**

73. The Task Group have so far concluded that:

- Having identified the specific problems at Fulford Cross, the Task Group agreed that the disposal of unsuitable/damaged items was just as important as the retaining of items and the development of the collections.
- The knock on effect of not disposing of unwanted/ damaged items and the lack of available storage space is likely to have contributed to preventing the progression of work on the collections and to the implementation of YMT's plans for the future.
- The Acquisition and Disposal policy needs updating as a matter of urgency (see paragraph 69 above). Therefore at the end of this review, they plan to recommend that YMT undertake this work and provide a revised draft of the policy for this committee's



consideration in early 2013. In order to frame and support YMT's work on the revisions to the policy, the Task Group would suggest that YMT initially provide a presentation to the scrutiny committee on the key principles that the policy review will be based on.

### **Completing the Review**

74. The Task Group are seeking the committee's approval for them to conclude the work on the review. Task Group's are usually formed from the membership of the parent committee, but following Annual Council, Cllr Watson is no longer a member of the Learning & Culture Overview & Scrutiny Committee. In this instance however, as Cllr Watson is the member who original submitted the topic, it is suggested that the Task Group can be reformed with the same membership.
75. In regard to the documentation of the collections and YMT's plan to use volunteers to progress this work (see paragraph 56), the Task Group have already queried what training the volunteers will receive. They would like to meet with some of the volunteers to find out more about their contribution to progressing work on documenting the collections.
76. Once they have carried out this consultation, the Task Group would like to hold one further meeting to:
  - a) Consider some additional information requested from YMT on:
    - the specific targets set by YMT for documenting the collections, and the progress they have made against them (see paragraph 52).
    - the November 2011 Veritau report (se paragraph 55)
    - whether the items listed in Annex C were sold or given away
    - any items that have not made it through the full de-accessioning process (see paragraph 69)
    - the standards required to achieve national accreditation referred to in paragraph 72 above.
    - the standards that curators have to work to
    - the findings from the two reviews held since the Trust was formed
  - b) identify their final conclusions based on all of the information received, including whether or not YMT have achieved appropriate collections management standards in line with the Collections Loan Agreement and Collections Management Protocol agreed in 2002, in line with the remit for this review
  - c) identify appropriate recommendations

## Council Plan 2011-15

77. The success of the Yorkshire Museum Trust and its 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

78. The Committee recognised that had they not proceeded with the review, and the concerns of Cllr Watson about the collections had proven to be correct, there was a risk to the council that the cataloguing of the collections may not be completed in line with the Partnership Delivery Plan. The findings and any resulting recommendations arising from the review should mitigate that risk.

### Recommendations

79. At this interim stage, Members are recommended to:
- i. Note the review findings to date
  - ii. Agree to the Task Group being reformed with the same membership to complete the review on behalf of the Committee
  - iii. Identify and agree any further issues the review should focus on, and instruct the Task Group accordingly
  - iv. Agree a timeframe for the review's completion in the new municipal year, and revise the Committee's workplan to reflect this

Reason: To ensure compliance with scrutiny procedures and protocols.

### Contact Details

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**Report Approved**



**Date** 31 May 2012

**Wards Affected:**

**All**



For further information please contact the author of the report

**Background Papers:**

Topic Assessment Report dated 7 December 2011  
Executive Report July 2002

**Annexes:**

**Annex A** - Current Partnership Delivery Plan 2008-13

**Annex B** - Acquisition and Disposal Policy 2005

**Annex C** - Record of Disposals Made by YMT Since 2003