A REVIEW OF RESEARCH AND LITERATURE ON MUSEUMS AND LIBRARIES

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ARTS COUNCIL ENGLAND

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Section 1

INTRODUCTION

From October 2011 the Arts Council takes on new responsibilities for museums and libraries. In preparation, we have undertaken a range of activities to understand the needs and priorities of the sectors. One is this review of the key research and literature for museums and libraries.

The purpose of the review is to help the Arts Council understand the museum and library landscape, by:

- providing a brief overview of key opportunities and challenges facing museums and libraries in England (and the UK) today
- identifying specific opportunities and challenges relating to the Arts Council's long-term goals and four-year priorities
- assessing the relative effectiveness of the Museums, Libraries and Archives Council's activities in developing the museum and library sectors
- exploring future research and evidence needs relating to museums and libraries

The Arts Council takes on its new responsibilities following the closure of the Museums, Libraries and Archives Council (MLA). One goal of this review was to capture the research and evidence knowledge held by the MLA and to enable the Arts Council to become familiar with the MLA's research and evaluation activities. The review was carried out in collaboration with the research team at the MLA and draws heavily on its expertise and on research resources held by the MLA.

The review took place between April and June 2011. In order to identify key documents, recommendations were sought from research and policy experts in the museums and libraries fields. This included:

- research and policy staff from the MLA
- staff from key sector bodies (including the Museums Association MA, the Association of Independent Museums AIM, Archives Libraries and Museums Alliance UK (ALMA-UK), the National Museum Directors' Conference (NMDC), Chartered institute of Library and Information Professionals (CILIP), the Library and Information Science (LIS) coalition and the Research Information Network (RIN))
- academics specialising in museums and libraries
- people from key stakeholder bodies including the Local Government Group and the Heritage Lottery Fund

This resulted in a long-list of over 200 documents, around 50 of which were then prioritised for detailed analysis. Initially, documents were prioritised if they were mentioned by multiple expert advisers, or if the MLA research database showed they had been widely used (judged by the number of downloads from the database website). Then documents were chosen from the long-list to fill gaps in the topics covered.

The material analysed covered a range of different types of literature including research studies and evaluations; consultations among practitioners, organisations, audiences and other stakeholders; published policies or strategies of organisations including central and local government; and authoritative or influential think pieces. Documents were assessed in terms of their purpose, methodology, rigour and data quality, key findings and insights, and insights or learning points related to developing future strategy. One aspect of the analysis was to consider what the literature said in relation to the themes of the Arts Council's strategic framework for the arts sector – excellence, engagement, sustainability, leadership and workforce, and children and young people. This was found to work well as a framework for analysing the literature and so the resulting report follows these same broad themes.

In order to ensure currency, studies considered tended to be from 2004 onward. In terms of content, the review focused on the infrastructure and forms of support required for museums and libraries to flourish. There is a great deal of research conducted by both sectors that looks at museum and library practice itself; for example, many museums are very active in collections research. This literature was largely considered outside the scope of this review. Similarly, the evidence base includes a large number of reports that aim to account for the impact and value of the museum and library sectors. This review is not focused on giving an account of the evidence for the impact and value of the sectors, but it is interesting to note what the nature and scale of this literature tells us about the challenges and opportunities in the library and museum sectors. This is further discussed in section 8.

This review is a supporting document to *Culture, knowledge and understanding: great museums and libraries for everyone*, the Arts Council's first framework for its work with museums and libraries. As with that document, this review is a starting point for further exploration, capturing our initial understanding of the research and literature for museums and libraries. We welcome your views on it. You can get in touch by emailing: museums.libraries@artscouncil.org.uk.

Section 2

THE SHAPE OF THE MUSEUM AND LIBRARY SECTORS

Both the museum and library sectors are diverse in terms of organisation size, governance, and funding sources. There is no single up-to-date source of figures on the shape of these sectors. However, a picture can be pieced together using a range of sources from over the past decade; this gives a good approximation of the current situation as museums and libraries are more likely to be formally constituted as long-term ventures and so are less changeable in their makeup relative to other cultural sectors such as the arts (Stanziola, 2011).

There are around 1,600 museums in England, of which 1,400 are accredited by the MLA (MLA, 2011). Around half of museums are independent charities or other types of third-sector organisations. A third are run by local authorities. Around 8 per cent are private, commercial entities, and 5 per cent are attached to academic institutions. Finally, there are a handful of museums funded directly by the Department for Culture, Media and Sport (DCMS), (13 'nationals' and seven 'non-nationals') and a few museums funded directly by other central government departments, notably the Ministry of Defence; together these account for about 3 per cent of museums. (LISU, 2006).

The museum sector as a whole uses a range of funding sources. Local authority-run museums tend to rely on public grants for the majority of their income. Among other types of museums, public grants are a substantial funding source and other funding sources are quite diverse, including open market activities and philanthropic funding. It has been commented that, compared to the situation in many other countries, our museums have a relatively wide mix of funding sources. (FreshMinds, 2008).

Figures for the scale and range of public funding sources in England are available for 2006/07 (Renaissance Review Advisory Group, 2009; DCMS et al, 2010) when:

- DCMS was the largest funder at £350 million (most goes to its directly funded museums; £32 million to the Renaissance programme)
- Local authorities accounted for £251 million plus £75 million capital investment
- Heritage Lottery Fund distributed £66 million through grant funding programmes
- Smaller funding sources included
  - Ministry of Defence, £16 million
  - Arts and Humanities Research Council, £10 million
  - Arts Council England, £6 million.

Providing a public library service is a statutory obligation for local authorities and they are required to consider how library services meet local needs (Charteris, 2009). Public library services are generally arranged separately by each local authority area, with around 151 public library authorities in England which run around 3,500 libraries between them (MLA, 2010). Other figures for libraries in England are more dated. In 2004/05, there were some 700 academic libraries attached to universities, and around 500 in further education colleges (LISU, 2006; note the further education figure is for the UK). Recent research suggests that around 80 per cent of primary schools have a designated library space, and almost all secondary schools do (Douglas and Wilkinson, 2010). There is one English national library, the British Library, which has three service points; and 5 other UK libraries are also Legal Deposit libraries. There are also some private libraries, but this review did not come across any figures for these.

There is good budget information available for public libraries from Local Government Finance Statistics, which shows non-capital investment by local authorities in England of £1.04 billion in 2008/9, and a further £117 million in capital investment (DCMS et al, 2010). This review did not come across any financial data for other types of libraries.

Section 3

EXCELLENCE IN MUSEUMS AND LIBRARIES

The activities of the MLA have largely focused on a strong development agenda – providing practical support, highlighting good and best practice, and running programmes, all to help drive improvement in museum and library practice. This section aims to understand and assess these activities, learn lessons and think about future needs.

To think clearly about this requires an understanding of what excellent museum and library practice looks like. Trying to answer this is not straightforward, because there are ongoing debates about the role of museums, and even more so for libraries. This section considers these debates, the key components of excellence, and the drivers of improving quality.

3.1 Museums

3.1.1 The role of museums
Museums' understanding of their role has shifted over the years: the traditional notion of a museum was as a centre of scholarship and curatorial expertise but over time this has moved towards a more explicitly public-oriented role, helping people to learn about society, culture, history and science, and providing entertainment (Travers, 2006). The MLA's definition of excellence in museums reflects a strong orientation towards a social role: it describes excellence as being about the quality of the experience and the public benefits gained from engagement (both cultural and social), as well being about institutions being innovative, risk-taking and international in outlook (MLA, 2009).

Collections and the active use of collections are a key element of this, although the argument is again framed around the social role of museums: it is argued that it is through collections and how they are used to deliver cultural experiences that museums give benefit to the public (MLA, 2009; Wilkinson, 2005).

Evidence on user and general public views of the role of museums also shows a focus on social or public benefit. Research using focus groups to explore what the public values about museums suggests that they value museums for supporting learning, especially informal, family and life-long learning; as a social and recreational space; and for shaping a sense of self and society through preserving cultural heritage and building understanding of other cultures (Usherwood et al, 2005). It found that people attribute an 'existence value' to museums, believing that it is important that these functions exist even if they do not themselves make use of them. However, we cannot be certain whether these focus groups reflect the full range of public views, because there have not been any surveys measuring general public attitudes more comprehensively. Research with actual users of museums, namely the Renaissance regional hub museums, does show that the highest rated and most important attribute of the museum experience for these users is as 'a place where you can learn', which brings opportunities for developing personal knowledge and understanding (BDRC Continental, 2010).

3.1.2 The components of excellence in museums
The framing of the role of museums around public benefit is not uncontested. Some argue that this approach has been overly driven by political agendas around social inclusion and exclusion (see for example Tlili, 2008). Certainly it is clear that museums 'are complex organisations, run by committees of passionate and committed individuals, funded by donors and politicians with their own vastly divergent agendas, and supported by individual visitors and stakeholders who are as various as they are numerous', with the result that museums 'have long been an arena for competing philosophies and approaches' (Wilkinson, 2008 p 337).

However one frames the role of museums, it is clear that there has been increasing demand for accountability from public funders (Travers, 2006). An ongoing gap in the evidence base for the museums sector is the lack of an easily verified and reported set of measures of a museum's 'success', measures which connect with a museum's mission and core values as well as indicating the organisation's capacity to deliver on that mission (Babbidge et al, 2006). However, it is likely that demand for a simple set of measures is difficult to meet: the question of how cultural sector excellence should be judged is a thorny and long-running dilemma (Bunting, 2010). The MLA has required funded museums to collect some data to agreed formats; these measures cover visitor numbers (with detail on child and education institution visits), participation in on-site activity, and contacts through outreach such as touring exhibitions.

A component of excellence that is widely agreed on is the importance of museums' collections and their effective use (Wilkinson, 2005; Cross and Wilkinson, 2007; MLA, 2009). This requires sufficient specialist expertise to research collections, generate new knowledge, and pursue acquisitions; as well as to use existing collections more effectively to deliver high quality cultural experiences and create narratives that speak to the public (Cross and Wilkinson, 2007; Renaissance Review Advisory Group, 2009; MLA, 2009). The MLA has emphasised the value of subject-specific networks of scholarship and practice among museum professionals as a key element of encouraging excellence in working with collections (MLA, 2009).

It has been strongly argued that museums should do more to have their collections in active use, including through collaborating and sharing collections using loans and temporary exhibitions (Wilkinson, 2005). Practice in this area has improved in recent years, with a good level of provision of touring exhibitions, particularly in the area of contemporary visual art, although less so for other areas such as social history (Cross and Wilkinson, 2007). There are a range of relatively new approaches to making collections more publicly available and creating alternative access routes, for example through open stores, display in non-museum premises, and using digital presentation to show a wider volume of material than can be shown in the physical space (Wilkinson, 2005; MLA, 2009; Cross and Wilkinson, 2007). The relative effectiveness and cost-effectiveness of these approaches is not yet known.

The need to keep actively developing collections, including through ongoing acquisition and disposal as appropriate, is a recurrent theme (eg Wilkinson, 2005). In this respect, there are continuing concerns that museum professionals are perhaps overly cautious in disposal (Cross and Wilkinson, 2007; MLA, 2009). At the same time, there

is some anxiety that museums policy might move in the direction of concentrating collections in larger museums as 'centres of excellence', with concerns that this would adversely affect smaller museums (Cross and Wilkinson, 2007). There are several public grant funds to support acquisitions, including two funded by the MLA (the V&A fund and the Preservation of Industrial and Scientific Material (PRISM) fund), but there is a lack of evaluative literature on how effective these are. A recent Heritage Lottery Fund programme has experimented with supporting collections development on a more strategic rather than purchase-by-purchase basis, through multi-year funding for programmes which include purchases but also staff development and public involvement activities; early evaluation suggests this is a fruitful approach (Mirchandani and Norgrove, 2010).

Some in the museums sector argue that the public want to be not just consumers but also producers of the cultural experience, and that more debate is needed on the degree to which museums should share control of the meaning of objects with users (MLA, 2009). There is a body of knowledge in this area, as some museums have substantial histories of involving the public in shaping the interpretation of collections. Research suggests that people value museums as a source of neutral and authoritative knowledge (Usherwood et al, 2005); so perhaps the key question is how museums can lead interpretation in ways that are 'authoritative without being authoritarian' (Cross and Wilkinson, 2007, p 24).

An interest in supporting the public to be cultural producers is also reflected in the growing community engagement agenda, which has seen museums work to involve the public in actively shaping services. There is a strong body of developing good practice in this area, which suggests that many museums have been successful at increasing consultation with users and communities, although there are fewer examples of museums involving users and communities to a degree that they had a strong sense of control or ownership of the museum experience (ERS, 2010; Lynch, 2011).

3.1.3 The drivers of excellence in museums
This section considers the key programmes and interventions that the MLA has employed to increase excellence in museums: Renaissance and Accreditation.

The Renaissance programme was implemented in response to what has been described as a situation of growing crisis for regional museums in the early 2000s, when commentators argued that major regional museums and galleries were suffering a lack of capacity. A taskforce concluded that the quality of some regional museums was variable, with under-funding and unclear policy frameworks, a lack of collaboration or leadership across the sector, and ineffective use of the available collections and scholarship resources (Resource, 2001). Some argue that the issues highlighted by the taskforce have in fact been long-running difficulties in the regional museums sector, noted in government reports as early as 1928 (Babbidge, 2005).

Renaissance established sets of regional 'hub' museums: in each English region a cluster of four to five museums were designated 'hub museums'. The hubs received funding to carry out capacity building activities. The intention was for the hubs to share learnings with non-hub museums, including smaller local authority museums, and independent and voluntary museums. Non-hub museums also had support through a strand of work called Museum Development, with Museum Development officers giving professional support and guidance, and access to a small grants programme called the Museum Development fund (Renaissance Review Advisory Group, 2009).

Renaissance funding accounted for around 13 per cent of the revenue budgets of participating museums. This may sound small, but when one considers that up to 90 per cent of museum budgets go to fixed building and staff costs, the Renaissance funding 'in effect more than doubles the variable budget of these museums' (Renaissance Review Advisory Group, 2009, p 20).

In 2009, the Renaissance programme was subject to a substantial review. The review concluded that both the extra funding and the energy generated by the programme were successful at raising the quality of museum delivery. It was successful at increasing visitor numbers at hub museums and achieving visitor profiles that matched local ethnicity and disability patterns (with the exception of London, which still had more white visitors proportionate to the local profile). The museums had improved profile and status with stakeholders in their areas, there was better management and presentation of collections, the service was modernised, and there were improvements in public learning benefits. For non-hub museums, the Museum

Development Officer structure was considered to be achieving 'real change' (Renaissance Review Advisory Group, 2009, p 3).

It is difficult to pinpoint which elements of Renaissance led to these positive outcomes. The programme itself included a wide range of activities and delivery varied across regional hubs. A number of activities under the Renaissance programme have not been evaluated, or only partially (Renaissance Review Advisory Group, 2009).

Nonetheless, there are some key lessons from the Renaissance programme to date that can help to inform development.

The first is the importance of finding a balance between a strategic overall vision and the provision of detailed guidance for specific areas of activity. There is evidence that the sector feels the Renaissance programme was overly focused on annual time-limited projects and lacked a sense of a coherent programme for long-term change. Some argue that there was too much emphasis on bureaucracy and instances of micro-management. Evaluations of Renaissance have argued for a clearer narrative of what the programme intends to achieve, with tight focus on a small set of key outcomes, and clearer reporting on these. They have also suggested a stronger national overview of strategy for non-hub museums through establishing a national framework for the Museum Development Officer network (ERS, 2010; Renaissance Review Advisory Group, 2009).

The second lesson is that greater clarity is needed on the roles and responsibilities of funded organisations (Renaissance Review Advisory Group, 2009). In particular, partnership working across the museums sector could be improved by more explicit tasking of funded hub museums with responsibilities for building partnerships and sharing learning. This topic is discussed further in section 5.3.

A final finding of the review of Renaissance noted that, since the programme had been successful in improving the capacity of the museums sector, there was now a need for museums to shift their focus outwards, with the aim of continuing to improve their public offer and advocating for their role within communities:

'…in order to effect the comprehensive transformation that the Task Force visualized, museums needed to change from introspective institutions – preoccupied with their resource problems (genuine though these were) – to outward looking organisations: confident,

ambitious and articulate about the values they create for society.' (Renaissance Review Advisory Group, 2009, p 13).

The other key element of the MLA work to build excellence in the museums sector besides the Renaissance programme is the Accreditation scheme. The Accreditation scheme sets nationally agreed standards for museums in the UK, which museums must show they meet in order to be registered as accredited. Research has found this scheme to be successful at defining standards in the sector, leading museums to harmonise and formalise working procedures and policies (Jura Consultants, 2009). Accreditation has acted as a badge of an organisation's credibility, which in turn has enhanced the degree of partnership working and loaning of collections between museums, as well as assisting grant applications, particularly to the Heritage Lottery Fund. Local authority museums commented that it had improved their profile and status within the parent organisation. Most participating museums say that the benefits outweigh the costs of applying. By 2009, 1,800 museums across the UK had participated in the scheme.

While the evaluation of Accreditation pointed out some areas where the scheme needed adjustment (some elements were revised in 2009), in general it appears to have been a strong factor in improving excellence in museum practice. This raises questions of whether such a standard-setting scheme could benefit other parts of the cultural sector.

3.2 Libraries

3.2.1 The role of public libraries

There has been substantial recent discussion about the purpose and role of public libraries. The Department for Culture Media and Sport (DCMS) initiated a 'Modernisation Review' in 2008, followed by a consultation paper in 2009 and a policy statement in 2010. The discussions are shaped by a shift by public libraries to broaden their role beyond a traditional focus on books, reading and research, and by a downward trend in the number of public library visits and books issued (DCMS, 2009, DCMS, 2010b, Murray, 2010; Renaisi, 2011).

Libraries today are involved in a wide range of activities, including encouraging reading and providing books, supporting learning across all ages, brokering access to a wide range of types of information, acting as a community space, linking to other public and community

services, and supporting digital participation (DCMS, 2009). The DCMS consultation paper framed these within an overarching narrative of libraries as information and learning services that support equality of opportunity and help to create informed and empowered citizens (DCMS, 2009). This narrative chimes with research on how library staff see their role (CILIP, 2010), and echoes themes in the MLA's 2008 Action Plan.

The public appear to have a somewhat different view of the role of libraries. Recent research with a nationally representative sample of the public has found that books are still the main reason why most people use public libraries, and are seen as the core offer by library users and non-users alike. The public see libraries' core purpose as being about reading, learning (particularly for children), and finding information. Beyond this, awareness of the wider range of library activities is low. People who actually use public libraries themselves rate book stock and customer service standards (such as opening hours, knowledgeable staff and a pleasant environment) as the most important characteristics of library services. For some users, libraries are also valuable as a place to seek social contact (Woodhouse, 2010).

3.2.2 The components of excellence in libraries
There is no clear steer from the literature on how best to resolve the varying views of the core role of libraries. Some suggest raising public and stakeholder awareness of libraries' wider activities such as digital inclusion and health and wellbeing services (CFE, 2010; Hicks et al, 2010). The DCMS suggested specifying a 'core offer' for libraries, and listed the activities it believed to be core (DCMS, 2010b), namely:

- library membership from birth; and opportunity to be a member of all libraries in England
- opportunity for the public to help shape the service; and services that reach out to local people
- free access to a range and quality of book stock and online resources and information; 24-hour access through online catalogues and services; and access to the national book collection
- connecting a community of readers though reading groups, activities and recommendations
- free internet access for all and help to get online
- commitment to customer service and expert, helpful staff

- a safe local space that is accessible and convenient; and flexible opening hours to suit local need
- links to other public services and opportunities

Most respondents to the DCMS Modernisation Review consultation agreed with the idea of a national core offer, but it is not clear how much agreement was reached on what should be in that offer. For example, while most respondents to the consultation felt children's services should be part of the core offer (DCMS, 2010a), these were not included in the DCMS list of core activities.

Therefore, the question of the core role of libraries remains contested. One possible approach might be to further pursue the question of what the public value about libraries, for example through undertaking a public value enquiry. Alternatively, it may be that the notion of a 'core role' is not suited to a sector that is funded by local government, involved in such a wide range of activities and delivering against differing local needs and priorities.

One view that appears to be quite common in the literature on library services is that the value of public libraries does not lie in their collections per se, because on the whole these are not unique in the way that museum collections are (BOP, 2009). It may be that this view lies behind the limited emphasis in the literature on library book stock, and the stronger focus on service provision.

In some respects there is a lack of data about the actual activities of England's libraries. There is good management data collected by CIPFA which captures basic measures such as number of visits, book issues, and expenditure; but a lack of more in-depth information. For example, while we know how many visits libraries have, it is not known how many of these are from children and young people, let alone the activities done by children and young people while at the library besides borrowing books (BOP, 2009). The MLA has begun to fill such knowledge gaps in some areas, documenting library digital access activities (CFE, 2010), and health and wellbeing services (Hicks et al, 2010). Further work is needed to help libraries document the nature and scale of their activities, and it has been suggested that a library 'census' day – where libraries recorded basic information about all visitors and activities – could offer a way of collecting such data without putting too much burden on libraries or on their users (BOP, 2009). Currently libraries can subscribe to a CIPFA service which supports surveying users.

Concern has been expressed about the variable quality of public library services across the country (DCMS, 2009). However, this evidence review has not found any literature empirically examining how much quality varies, in what respect it varies, or factors associated with variations. There is quite a lot of material available on best practice in library services, much of it created by the MLA, but it is difficult to draw out broad lessons on the factors crucial to ensuring a high quality service. No doubt the ongoing debate about the core role of libraries is partly responsible for this; if it is not clear what the central mission is, it is difficult to pick out the key factors needed to achieve it.

The growth in digital technology poses challenges and provides opportunities for library services. The internet has built expectations of rapid access to information, and some argue this has led library users to demand higher convenience and accessibility of library services (DCMS, 2009). Many public libraries now offer online catalogues and online renewals (DCMS, 2010b). Currently, 8 per cent offer e-books and, in terms of future plans, by far the most common is to offer downloadable content (CFE, 2010). There has been some research to explore levels of public interest in particular online activities, which is suggestive of ways in which an online offer could be developed. Among those with an interest in libraries, three quarters would like to be able to learn more online about what activities are available at the library (eg exhibitions, literary events), one third were interested in the possibility of virtual tours (eg around the library), and there is clear demand for libraries to provide digital literature-based opportunities (MTM London, 2010).

Digital technologies change where and how information is recorded, and so raise questions around how much libraries should facilitate access to digital content, or perhaps even store such content. This is particularly an issue for academic libraries and libraries with special collections, and there is growing body of evidence on how the behaviour of researchers, including doctoral students, is changed by digital technology (Key Perspectives Ltd, 2007; Education for Change and The Research Partnership, 2011). From the public library perspective, librarians are coming to think of themselves as 'information literacy enablers', helping people to navigate online content (CILIP, 2010). It is therefore important that library services keep abreast of developments in digital technology (DCMS, 2010b).

One lesson on the components for excellent library services that can be drawn from the literature is that it is important for libraries to continue to provide a neutral, shared public space for users. The public have high levels of trust in libraries, which is partly rooted in the assumption that libraries provide a more impartial source of information than alternatives such as the media. They think libraries are especially important for groups such as children, older people and people on low incomes (Usherwood et al, 2005; Woodhouse, 2010). Other stakeholders from public and voluntary sector services value the fact that libraries offer a non-stigmatised space to access otherwise hard-to-reach individuals (Hicks et al, 2010; Renaisi, 2011).

As with museums, there is a growing community engagement agenda in public libraries. Libraries have a strong record in making services responsive to consumers and the wider community and there is increasing interest in involving local people more fully in shaping and delivering local library services (Local Government Group and MLA, 2011). Evaluation of some existing activities suggests that it would be helpful if funders and organisations developed a stronger vision of what community engagement means and what it can do; and if funders gave more clarity and guidance on expected outcomes and resource implications (Renaisi, 2011).

3.2.3 The drivers of excellence in libraries
Key programmes and interventions that have sought to drive improvements in service quality include the DCMS's 'Framework for the Future' development strategy of 2003, and two initiatives funded by the Big Lottery Fund – the People's Network which in the early 2000s gave libraries computer and internet facilities, and the Community Libraries programme which more recently invested in library refurbishment. Evaluation of the People's Network indicates that the area of digital technology is one where national-level activity can be powerful in driving service improvements (Sommerlad et al, 2004), and the MLA has continued to provide a range of digital services for the library sector at a national level. Evaluation of the Community Libraries programme has focused on its community engagement elements, discussed further in section 4.3. Evaluation of the first years of the Framework for the Future found it led to improvements, particularly through providing a vision that gave services direction and legitimacy, and increasing management capacity (Kelleher et al, 2007). More recent activities under the Framework, as outlined in the MLA action plan for 2008–2013 (MLA, 2008), have not been evaluated systematically to date.

Part of the MLA approach has been to provide support and guidance on best practice, including through website resources with good and best practice examples and case studies. These resources have been popular judging from the rising number of downloads over the past few years (Anton, 2011). This review has not uncovered any literature on how successful this approach to improving quality has been. There is some suggestion from the literature that improvement programmes should encourage a focus on strategic vision and purpose because, if this is absent, improvement guidance can feel overly bureaucratic (Renaisi, 2011).

The DCMS has argued that there is a need for voluntary accreditation and a peer review system to support improvements in the quality of library services (DCMS, 2010b). The MLA has supported peer review of library services in recent years, and research suggests it has helped to improve services (Kelleher et al, 2007). The library sector can apply for the Designation scheme, which identifies nationally important collections in England's non-national museums, libraries and archives; this scheme is seen as valuable, particularly in raising standards and improving practice (Firebird, 2009), but does not address libraries without unique collections. The MLA does offer a 'library benchmark' tool, but this does not set out standards.

3.2.4 Other types of libraries

The evidence reviewed here is heavily focused on public libraries, and judging by the literature suggested for this review it appears that national policy attention has also focused on these types of libraries. It should be noted that there are large numbers of other kinds of libraries and that challenges and opportunities are likely to vary by the type of library. For example, for academic libraries the growth in research outputs, particularly digital outputs, raises questions about the appropriate balance between different aspects of the librarian role such as information finding, subject specialism, and cataloguing (Key Perspectives Ltd, 2007). Some recent research has highlighted a range of issues for school libraries, including wide variations in how school libraries operate and in their quality, and clear opportunities to improve their contribution to the work of schools; it suggests that one approach to strengthening school libraries may be through building their links with the public library service (Douglas and Wilkinson, 2010).

3.3 The local context: who determines excellence?

Museums and libraries operate with a range of partners including local authorities, national government departments and bodies, other primary funders such as universities, and also private sector and community partners. This means they need to negotiate a range of agendas, and there is an ongoing challenge in finding the appropriate equilibrium between having nationally shared strategic vision, and being responsive to other agendas including local priorities.

In particular, local authorities are very important for museums and libraries. Around a third of museums are run by local authorities, and some independent museums are also given regular grants by them (LISU, 2006). Public library services are almost entirely run and funded by local authorities. These sectors are therefore strongly oriented to local authority priorities and the needs of local communities. This was clear from the spread of literature suggested for this review, with around a fifth of the suggested materials addressing aspects of how libraries and museums interact with and contribute to local communities.

Some literature suggests that the local authority context can present challenges for public libraries in particular, with inconsistent investment and support from local authorities due to 'local political judgments and multiple priorities for local government budgets' (MLA 2008, p 3). On the other hand, national partners can be similarly inconsistent – one of the critiques of the Renaissance programme has been that its investment per capita varied from region to region without making allowance for local or regional conditions, or the quality of museum performance (Renaissance Review Advisory Group, 2009).

The literature suggests that the best approach for the museums and library sectors is to seek to balance both a strong national strategic overview and vision, and flexibility and space for responding to local priorities. For example, the Renaissance review argued for a tighter set of centrally-determined outcomes focusing on the unique contribution of museums; but also argued that funded museums must be free to develop their own implementation plans based on local needs (Renaissance Review Advisory Group, 2009). A subsequent evaluation of the Renaissance provision for non-hub museums came to similar conclusions, arguing for both a national strategic framework for Museum Development Officers and for grant funding to target projects with 'quantifiable benefit to local strategic priorities' (Jura Consultants, 2009a).

It can be difficult to find the appropriate balance, and different stakeholders disagree on what this is. For example, the Renaissance review recommended replacing the Regional Renaissance Boards with a single National Board (Renaissance Review Advisory Group, 2009), while the MLA chose not to take up this recommendation. It may be that balancing national vision with local priorities becomes increasingly difficult as shrinking public funding means local agendas become more focused (Rowley, 2011). On the other hand, increasing political focus on the importance of local authorities and local communities offers opportunities for museums and libraries as local service providers. It will be important that the Arts Council builds strong relationships with local authorities, both in terms of high-level partnerships and in terms of local working, to support collaboration in the cultural sector. It is similarly important that the Arts Council works in partnership with other primary funders such as universities.

Section 4

PUBLIC ENGAGEMENT

Museums and libraries are strongly oriented to thinking about the people who engage with them, and ways to broaden and deepen that engagement. This was evident from the documents suggested for this review, around a fifth of which were about aspects of public engagement. This is a view shared in varying degrees across the DCMS sectors, and much research on engagement with the cultural sectors (arts, heritage, museums and libraries), has looked at these sectors in tandem, and has encouraged them to focus on their users (FreshMinds, 2007; Marsh et al, 2010). The evidence about public engagement in these sectors is quite substantial, with good data and research; this is particularly the case for museums, where the MLA has funded the collection of data on visitor numbers and experiences at Renaissance hub museums (BDRC Continental, 2010).

4.1 Current engagement

4.1.1 Museums
There have been increasing numbers of people visiting museums over the past few years, and now just under half of the adult population, 46.3 per cent, have visited a museum at least once in the past 12 months of 2010/11. Research shows that, holding all other factors constant, museum visiting is particularly likely among older people, people with higher education levels, and people with higher socioeconomic status. It used to be thought that people from minority ethnic backgrounds were less likely to attend, but it is now known that younger ethnic minority people are as likely to attend museums as their white counterparts – though older ethnic minority people are less likely to attend (Marsh et al, 2010). Of course many museums also have visitors who are tourists, who are not captured in these figures.

A great deal is known about visitors to Renaissance regional hub museums because the MLA has funded regular exit surveys, where randomly selected people are asked to participate in a short interview as they leave the museum. Most of these visitors are very satisfied with their visit (80 per cent) and satisfaction has improved over the past few years (up 15 points since 2004, possibly due to the Renaissance programme). As discussed in section 3.1.1, learning is a key motivation for visitors, and other common motivations are for 'fun, inspiration or sightseeing', 'convenience or time-filling' (20 per cent) and 'to bring children' (13 per cent) (BDRC Continental, 2010).

While there is excellent data on the visitors to hub museums, and good national data on engagement levels, data collection by individual museums across the country varies. This means there are ongoing difficulties in being able to, for example, give definitive figures on the numbers of visits to all museums (Davies, 2005).

4.1.2 Libraries
Public libraries saw a decrease in numbers visiting over the period of 2005/06 to 2008/09; this has since stabilised and 40 per cent of the adult population visited at least once in the 12 months of 2010/11 (DCMS, 2011a). The profile of library visitors is somewhat different to other cultural sectors such as museums, the arts, and heritage. Like other cultural sectors, holding all other factors constant, people who are older and with higher education levels are more likely to visit a library – though this pattern is less marked than for other forms of cultural engagement. Unlike other cultural sectors, differences in socioeconomic status do not affect the likelihood of people using a library. Similarly, illness or having a disability does not reduce the likelihood of engaging. People from minority ethnic backgrounds are generally more likely to visit than white people (with the exception of retirement-age people), and having a child also increases the likelihood of visiting a library (Marsh et al, 2010).

Less is known about the motivations and experiences of people who visit public libraries than is the case for museums. As discussed in section 3.2.1, access to books for pleasure and study is a key motivation, and other common motivations are to educate children, access knowledgeable staff, and have social contact (Woodhouse, 2010).

Data collection by public library services themselves is mixed. There is good information on numbers of visits and book issues through an

annual survey by CIPFA, but an ongoing need for better information on how people use library services – particularly what activities people do other than borrowing books, and what they think of their experience (DCMS, 2009; Renaisi, 2011).

4.2 Improving the visitor experience and attracting non-users

The museum and library sectors have both worked to improve the visitor experience, or as libraries tend to describe it, improve customer service. Exit surveys of visitors to the Renaissance hub museums find that visitor scores could be improved for the service being 'responsive to your needs', 'collections that are relevant to you', and 'good quality experience'. It is difficult to know how visitors interpreted these statements, or what would make them score these more highly; so perhaps further research is needed to explore the exact nature of the offer that most appeals to visitors (BDRC Continental, 2010). For libraries, there has been less work on the specific ways that the visitor experience could be improved, so again this may be an area for future research. The one suggestion that does arise regularly in the literature is for libraries to have more flexible opening hours (DCMS, 2010b).

In the museum sector, the discussion on how to attract non-users has centred on how to increase the number of visitors from specific priority groups (set by past DCMS targets) – people from minority ethnic backgrounds, people who have a disability, and people from lower socioeconomic groups (FreshMinds, 2007). These priority groups make up 28 per cent of all visitors to Renaissance hub museums; most of this percentage is people from lower socioeconomic groups, while ethnic minorities make up 5 per cent of all visitors and 4 per cent are disabled. The proportion of visitors from priority groups varies considerably between museums. There is no indication that the relative proportion of visitors from these groups has changed in recent years (BDRC Continental, 2010).

There has been some analysis of the motivations of visitors from these specific priority groups, which shows that they are particularly likely to cite 'to bring children' as an important motivation; there is also evidence that these groups tend to be more dependent on a smaller set of local venues – they tend to live slightly closer to the museum than other visitor groups, and also make fewer visits to other museums and galleries (BDRC Continental, 2010). This suggests some

possible approaches to increasing visitor numbers for these groups, such as emphasising services for children, and using cross-marketing between sets of venues to encourage people to branch out to other museums. It has also been suggested that the use of collections to tell culturally relevant stories that reflect the authentic experiences of different groups in society may draw in a wider range of people (FreshMinds, 2007; MLA, 2009).

Since the libraries sector already has representative numbers of visitors from the DCMS target groups of people from minority ethnic backgrounds, people who have a disability, and those from lower socioeconomic groups, the literature focuses on the more general question of how to encourage more people to use libraries. The DCMS Modernisation Review argues that there is definite potential to turn non-users into users, citing the fact that a third of non-users have borrowed a book from a non-library source (for example from a friend) or wanted to borrow a book in the past year – so they are interested in activities that could have taken place in a public library (DCMS, 2010b). Others have expressed scepticism about the potential of attracting non-users, pointing out that they generally say that they do not visit libraries because they have 'no need to go', a 'lack of time', or think libraries are 'not for me'. Few cite 'get books from other sources' as their reason for not visiting libraries (Stanziola, 2008). Research on what the public want from libraries recommended that libraries should communicate more about their unique services, such as activities, genealogy software and support, and the fact that borrowing books allows people to 'take risks' on new authors and to get hold of expensive reference books; it also suggested libraries have a strong brand to build on, with high levels of public trust (Woodhouse, 2010).

There is some evidence that one way to draw in new library users is through initiatives that are oriented around the reading offer. Examples are the National Year of Reading in 2008, which encouraged 2.3 million people to join the library; and the Summer Reading Challenge, which targeted children and saw 725,000 participating with 47,000 becoming new library members (DCMS, 2010b). There was also the Bookstart Baby Packs scheme, which encouraged parents to enroll their children as library members; the evidence on its effectiveness was equivocal (BOP, 2009). There have not been initiatives around other aspects of the library offer, so it is not known whether it is the 'offer' approach that draws in new users or the 'reading offer' in particular.

4.3 Deeper community engagement

There have been increasing efforts in both museum and library sectors to involve people more deeply in the development, delivery and management of services, in order to make services more responsive to local communities. This builds on an existing history among some museums of involving the public in interpreting collections and shaping exhibitions. Community engagement work has included activities such as user advisory groups, encouraging community groups to organise activities at museums and libraries, designing projects to draw in community groups that are otherwise under-represented as service users, and increasing the use of volunteers. Evaluations of activity in Renaissance hub museums and in the Community Libraries programme suggest that projects can produce positive results for staff and participants alike, although there is also scope for further development. To date, the degree of engagement in evaluated projects has largely tended to be more at the 'informing and consulting' than the 'design and delivery' ends of the spectrum, with only occasional evidence that the communities were exercising control. There is also some concern that community engagement activities have not become embedded in organisations' core work but are seen as discrete projects. It is therefore unclear whether they would be sustained if specific funding initiatives supporting them ceased (Renaisi, 2011, ERS, 2010, Lynch, 2011).

A substantial element of many current community engagement activities is increasing the use of volunteers; this is seen as a way to make services more responsive to the local community by drawing on volunteers' knowledge and networks (Renaisi, 2011). Currently, around 1.4 per cent of the population volunteer in museums and galleries, and 0.8 per cent in libraries (DCMS, 2011). Some argue that volunteer programmes as currently constituted could be more effective at building community engagement if volunteers were more involved in decision-making and higher-level activities, and if the profile of volunteers better reflected those of local communities (Anton, 2010; ERS, 2010).

In terms of lessons for the future, there are certainly examples of good practice, and potential for these examples to be shared more widely (Lynch, 2011). There is evidence that community engagement activities are more successful if organisations have the opportunity to develop a clear vision of the work they are doing, its value and expected outcomes. This can be encouraged by an explicit planning process and dedicated resource, and by clear guidance from funders (Renaisi, 2011). On the other hand, there is also some suggestion that an unintended consequence of the provision of special funding streams that develop engagement but sit outside the core budget is that it can limit the embedding of this work (Lynch, 2011). All in all, this is an area where there is scope for continued improvement in skills and knowledge, and a potential need for further research and development.

4.4 Digital engagement and informal learning

The internet offers opportunities for broadening and deepening people's engagement with cultural content, making it possible to: access culture, learn more about cultural content, directly experience cultural content, share that content with others, and create their own content (MTM London, 2010).

Research shows around half of the online population used the internet to engage with the cultural sector in 2009/10, most commonly to look for information about exhibitions and events and to buy tickets, with a significant minority using the internet to consume, share and create cultural content. Evidence suggests that for the sector as a whole the main opportunity for digital technology is to enrich and deepen engagement, rather than to draw in people who are not currently engaged. However, for individual institutions there certainly is the opportunity to reach people who are engaging in culture in some ways but who have not accessed a particular institution before – for example, someone who visits museums in York but would only access a collection in London via the internet. Research suggests that over half of those with a general interest in museums would also be interested in a virtual tour, and over two thirds would be interested in learning more online about an exhibition or object.

Of course not all members of the public have the same interests and needs, and segmentation research has suggested three broad groups of people using the internet to engage with the cultural sector, which organisations can draw on to develop their digital strategies (MTM London, 2010).

Public libraries have been strongly involved in supporting digital participation, particularly for specific digitally excluded groups (such as older people); half of those who do not have private access to the internet but do access the internet in public spaces do so at public libraries (DCMS, 2010b). All public libraries provide internet access, mostly free, and time is spent helping people to get online by library staff and third-party providers such as community partners (CFE, 2010). Areas where there is potential for further research are the level of customer demand for the various digital services offered by public libraries; the nature of digital participation and extent and depth of support in a public library setting; and the potential capacity for expanding this work (CFE, 2010).

Libraries' digital participation work is one aspect of how this sector supports informal and life-long learning. As was discussed in section three, the public see supporting learning and the finding of information as central to the role of libraries; and similarly museum users believe the most important attribute of the museum experience is that it is a 'place where you can learn'. As such, it is not surprising to see that both libraries and museums were closely involved in the The Learning Revolution, a Labour government initiative that sought to support informal adult learning in community settings; the MLA operated a Learning Revolution Challenge fund which encouraged museums and liberies to open up their spaces and resources to self-organised learning groups (Local Government Association, 2010). While there are many case studies of the range of informal learning work of museums and libraries (Local Government Association, 2010; NIACE, 2009), one paper has looked in detail at the opportunities for older people and concluded that there was a need for more rigorous data to be gathered on both the services being offered and the outcomes of these services and interactions (NIACE, 2009).

Section 5

SUSTAINABILITY AND RESILIENCE

5.1 Financial sustainability and business models

It is widely commented in the literature that the museum and public library sectors could improve their financial sustainability, through routes such as diversifying funding sources and adjusting business models (FreshMinds, 2008; Wilkinson, 2005; Renaissance Review Advisory Group, 2009; MLA, 2009; DCMS, 2010b, Rowley, 2011). Reductions in public spending make this issue more pressing. There is evidence that the sectors are not confident about performing well in terms of financial sustainability, but are aware of the issues and receptive to making improvements (FreshMinds, 2008). The literature focuses on two main aspects of financial sustainability: the shape of an organisation's finances, including the diversity of funding sources; and its broader business model, particularly whether alternative delivery models or governance arrangements could improve effectiveness and efficiency (Stanziola, 2011).

There are some distinct patterns in current funding and business models in the museum and library sectors (Stanziola, 2011). Public libraries have very low levels of funding diversification and relatively high levels of alternative business models such as procurement partnerships across library authorities, which over 80 per cent of library authorities have, and co-location with other services, which over 60 per cent do (DCMS, 2009). They are unlikely to have tried more extreme changes to their business model, such as having commercial subsidiaries or independent trusts. Most museums fall into one of two broad types. The first group, often local authority run museums, are fairly heavily reliant on public funding. Whilst to some degree they try alternative business models such as co-location and partnerships for procurement, they are unlikely to have attempted more substantial changes.

The second group of museums tend to have charitable status. They show the highest level of funding diversity, and have prevalent use of business models such as commercial subsidiaries and independent trusts.

Recent developments in the public library sector have focused on business models and governance, as part of the wider local government improvement and development agenda (Rowley, 2011). The Future Libraries programme, a project of the Local Government Group and the MLA, is supporting groups of library authorities to develop options for changing business models to improve efficiency and effectiveness. The participating libraries are not yet at the state of implementing the options that have been scoped, so further research is needed to track implementation and outcomes. The emerging change models include: sharing services across council boundaries; reviewing the locations of service points, including exploring digital services and co-location with other local services; using library services to deliver other service outcomes and priorities; using external providers; and transferring library assets to community or third sector ownership and management (Local Government Group and MLA, 2011). There are a small number of libraries which have already been supported and run by community groups during the last ten years; analysis of 29 such libraries highlights that the greatest opportunities for benefits to the public and to the local authority arise where community managed libraries work in symbiotic partnership with the public library service (Woolley, 2011).

Among museums, there has been work on both funding diversification and changing business models. Attention has focused especially on increasing private fundraising, with growing evidence that success is more strongly linked to internal organisational factors than to external factors such as the location or cultural form (Stanziola, 2011; Sood and Pharoah, forthcoming). Commentators argue that museums could also do more to diversify funding through providing services commissioned by others such as health services (Stanziola, 2011; Renaissance Review Advisory Group, 2009, Rowley, 2011); and by making appropriate use of alternative financial instruments, such as capitalisation and building reserves (FreshMinds, 2008; Stanziola, 2011). There is also scope for further exploration of how museums could use alternative business models such as commercial subsidiaries or independent trusts (Stanziola, 2011).

There have been instances of local authority museums moving to devolved museum trusts, with evidence that devolved museums experience advantages including increased partnerships, 'quicker' governance structures, the opportunity to benefit from fiscal advantages of charitable status and greater attractiveness to charitable donors. However, substantial financial savings were unlikely, and devolved museums were still often heavily reliant on public funding (Babbidge et al, 2006).

Commentators suggest that funders should support activities to improve the financial sustainability of museums and libraries (FreshMinds, 2008; BOP, 2011a). Interventions must be targeted to explicit organisational development outcomes which are then reported on (Renaissance Review Advisory Group, 2009). They need to increase staff knowledge and skills, but also make more concrete changes to equipment, roles or procedures (BOP, 2011a). Evaluation of the work of Renaissance hub museums in relation to sustainability shows improvements in staff skills and projected cost savings or increased income, but it was often too early to track the longer-term effects or how embedded activities were (BOP, 2011). Analysis from the first phase of the Future Libraries programme found that external support for libraries considering changing services is helpful (particularly technical advice and peer-based support and challenge); and that political or managerial leadership is a crucial factor in making change happen (Local Government Group and MLA, 2011).

5.2 Environmental sustainability

There was relatively little information on the topic of the environmental impact of museum and library services in the evidence reviewed. Some Renaissance hub museums have engaged in activities to improve the environmental sustainability of their activities, with emerging evidence of positive effects, though not always cost savings (BOP, 2011a). There have been efforts made by some in the museums sector to raise the profile of environmental issues (notably Museums Association 2008, 2009). Among libraries there is a lack of evidence, on either libraries' current environmental sustainability or possible improvements to this (BOP, 2009). This appears to be an area where there is great potential for rapid and substantial gains to be made (BOP, 2011a).

5.3 The role of partnerships

5.3.1 Partnerships within the sectors
There is a lot of interest in the idea of partnerships and collaborations in both the museum and library sectors. Among museums, increased partnership and collaboration was one of the goals of the Renaissance programme (Renaissance Review Advisory Group, 2009). Among libraries there has also been a growing culture of partnership, evident, for example, in high levels of shared procurement (BOP, 2011a; Key Perspectives Ltd, 2007).

Partnership working can help spread knowledge about best practice and new approaches between different organisations (MLA, 2009; ERS, 2010). It can also directly improve sustainability, for example through giving economies of scale (cost savings), and through pooling efforts to stimulate audience demand more effectively (BOP, 2011a). Commentators argue that there is a need to keep increasing levels of partnership working, particularly among museums (Renaissance Review Advisory Group, 2009; ERS, 2010). It has been suggested that the best approach to this by central funders would be to allow organisations to choose their own partnerships, but to make partnership working an explicit condition of funding with clear responsibilities for sharing skills, resources and learning (Renaissance Review Advisory Group, 2009).

In the museums sector, an underlying theme in the discussion of partnership working is the need to achieve an appropriate balance between the 'main' regional museums and other museums. An associated issue is the role of the national museums in relation to other museums. Some suggest that Renaissance has been overly focused on hub museums, which gave varied levels of support to the wider museum sector. It is felt that there is a need for 'greater recognition' of the wider museum sector, and that clearer requirements around partnership and knowledge sharing would help to rebalance the relationship (Renaissance Review Advisory Group, 2009 p15).

5.3.2 Partnerships outside the sector
Museums and libraries do a great deal of their work in partnership with community, third sector and public sector groups; for example, most of the health and wellbeing services delivered through libraries involve third sector partners delivering services within library settings (Hicks et al, 2010). The strength of these partnerships is considered further in section 5.4.1.

This review came across little literature on the partnerships of museums and libraries with stakeholders in the creative or wider economy. While the cultural industries are generally seen as part of the creative economy, most discussion is on the role of the arts (The Work Foundation and the National Endowment for Science, Technology and the Arts, 2007). The role of libraries is particularly unclear – they are not part of the creative industries according to the DCMS definition (DCMS, 2010), and there is a lack of evidence on their effects on local economies (BOP, 2009). It could be argued that libraries are integral to the knowledge economy, but this has not been much explored in the literature covered by this review.

It has been argued that museums could do more to engage with the creative economy and commercial sector (MLA, 2009), and that partnerships with organisations in these sectors would be particularly valuable for both museums and libraries that are already quite advanced in their thinking on financial sustainability (BOP, 2011a). There is some interesting recent work which piloted knowledge exchange programmes where museums and libraries worked with businesses and entrepreneurs, which showed clear scope for building entrepreneurship in the museum and library sectors, and was suggestive of ways in which culture organisations can help businesses and entrepreneurs to develop ideas, innovate and get inspired (Knowledge Transfer Programme/ Sparknow, 2010).

One area where the museum sector clearly contributes to the wider economy is in their role in the tourist economy. Some museums already number among the most popular visitor attractions in England, and the sector has been urged to continue to strengthen links to key stakeholders in the tourism economy such as regional tourism bodies (DCResearch, 2009a; BDRC Continental, 2010a). It is acknowledged that such work must sit in balance with provision for local and community need: local people are the majority of visitors to Renaissance hub museums even in areas with high tourist volumes, and a museum's role as a visitor attractions can benefit local communities in terms of generating revenue for the area (BDRC Continental, 2010; Roger Tym and Partners, 2008).

5.4 A social asset approach

5.4.1 Building social capital
An alternative way to think about issues of sustainability in the museum and library sectors is through the lens of a social asset approach. From this perspective, museums and libraries are assets that build social capital in a community, strengthening bonds within a community. It is this notion which underpinned the fact that engagement with libraries and museums was one of the measures available to local authorities in the National Indicators performance management framework used by the previous government, and there is certainly evidence that levels of cultural engagement are linked with levels of wider community engagement (BOP, 2009). Others point out that museum and library engagement can improve other social and wellbeing outcomes (Rowley, 2011).

If museums and libraries are social assets, a key sustainability question becomes how productive those assets are, and whether their social productivity can be improved. Work commissioned by the Local Government Association argues that the sectors could make stronger contributions to social capital through more explicitly building local partnerships (Rowley, 2011). This chimes with the community engagement agenda discussed in section 4.3; one of the ways organisations have built community engagement is to work in partnership with other community services (Renaisi, 2011). It has also been suggested that museums and libraries could build stronger local partnerships by acting as commissioned service providers for local authorities and other local services such as health services, which would require strengthening skills in responding to commissioning systems (Rowley, 2011; DCMS, 2010b). A balance will need to be struck between being responsive to the priorities of local partners and maintaining a sense of core mission independent of variations of local priorities – the latter is an important element in building organisational sustainability (FreshMinds, 2008).

5.4.2 The role of volunteers

The literature discusses volunteering in the museum and library sectors in relation to a range of themes covered in this review. This includes volunteering in relation to its capacity to build social capital; to increase community engagement; and in terms of its potential to create social, learning and wellbeing outcomes for volunteers themselves (Anton, 2010; Rowley, 2011). As one might expect, given the increasing activities in the sectors in relation to these issues, there is evidence of a commensurate increase in the number of volunteers in libraries (Murray, 2010).

There is not much discussion in the literature covered by this review of volunteering as a workforce issue, other than consideration of how volunteer management can continue to be improved (Anton, 2010). Museums have a long history of volunteer work, including entirely volunteer-run museums, and appear to be comfortable with the role of volunteers and in their own ability to continue developing good volunteer management practices (Baird and Greenaway, 2009). In the public library sector there are some concerns about the risk of volunteers being used to replace paid staff due to budget pressures; this is evident for example in responses to the MLA's consultation on community engagement (Ngyou, 2009). It may be that growing levels of government interest in new business models such as 'asset transfer' (where cultural assets are transferred from local authority to community ownership and stewardship) add to this concern: although community managed services need not imply a greater use of volunteers, it is also the case that most existing community managed libraries do largely rely on volunteers (Woolley, 2011).

LEADERSHIP AND WORKFORCE

Improvement and development initiatives in libraries and museums have often used workforce development activity as a tool for improving the quality of the offer. The MLA has invested in workforce development in a range of ways – through a national programme (Learning for Change); through activities in the Renaissance programme and in the *Framework for the Future* action plan, and through funding two sector skills councils (Creative and Cultural Skills, and Lifelong Learning UK). This review has not come across any evidence that assesses the success of this specific element of the MLA approach to improving the overall offer. The most recent MLA workforce development statement discussed trying a new approach: reducing direct investment in workforce development programmes, and instead funding the sector to manage its own continuing professional and skills development activities (MLA, 2009a).

It should be noted that any initiatives around the workforce of the museum and library sectors will require partnership working with the relevant sector skill councils and education institutions. These are issues that will require the Arts Council to work with a range of partners.

6.1 Leadership

There is increasing discussion of the need to consider the skills of people in leadership positions in the sectors. There is a need to improve the skills of leaders in entrepreneurship, creating and communicating vision and strategic direction, and 'outwardly' focused leadership – including the ability to influence, negotiate, and advocate (DCMS, 2009;

Renaissance Review Advisory Group, 2009; MLA, 2009a; Babbidge et al, 2006; Renaisi, 2011). While some programmes have aimed to improve skills in these areas, there is a need for robust evaluation of leadership training to identify the most effective approaches (MLA, 2009). An evaluation of one course the MLA supported, Take the Lead, concluded that, though participants spoke positively of it, it was too modest an intervention to foster wider sectoral change. The evaluators commented that wider cultural change was needed in organisations to support a more entrepreneurial and outwardly-focused approach (sam and Oakley, 2010).

6.2 Specialised skills

There is some debate in the museum and library sectors around the need for staff with specialist skills. In museums there is a general acceptance of the need for staff with specialist, subject-specific skills, and in maintaining existing subject-specific networks, as a way of continuing to encourage excellence in working with collections (MLA, 2009a). This is situated within an understanding that the role of museum staff is shifting, from being 'keepers', controlling access, to being 'sharers', supporting public access and interpretation (MLA, 2009a). Among libraries there are more substantial challenges, with an active debate on the required skills of staff in public libraries. It is widely suggested that the skill requirements have moved from traditional librarian skills (such as cataloguing and indexing), towards increased use of information technologies, and business and communication skills (CILIP, 2010; DCMS, 2009). There is low confidence among librarians of the recognition of their professional skill set: 55 per cent assert there is no standard skill set any longer; and 75 per cent believe their skill set is overlooked by society (CILIP, 2010). These issues are seen by librarians to be partly due to the ongoing financial constraints of libraries, which have changed the ways that libraries are managed (CILIP, 2010). There is also evidence of debate among academic libraries on what is core to the practice of academic librarianship (Key Perspectives, 2007).

6.3 Diversity

Some of the literature suggested for this review considered the issue of diversity in the museum sector, particularly ethnic diversity. Museums have an under-representation of ethnic diversity in their workforce: around 7 per cent are from minority ethnic backgrounds (including Asian, Black, Chinese, mixed and other non-white minority ethnic backgrounds), compared to 12 per cent of the general population; and among those working directly with collections the proportion from minority ethnic backgrounds is lower (Davies and Shaw, 2010). There have been some efforts to improve these figures, including a positive action traineeship and bursary scheme called Diversify!. This showed positive effects for participating individuals and host institutions, although there is no indication of wider effects beyond the participating institutions, which is perhaps not surprising given the relatively small scale of the scheme – 34 completed traineeships or bursaries 2002–2008, (Davies and Shaw, 2010; Porter, 2004). The MLA has suggested there is a need to collect current figures for the ethnic makeup of the museums sector, and for further work to develop greater diversity in the staffing of the museum sector (MLA 2009; MLA 2009a). The Museums Association has suggested there is a need to widen entry routes to include more (paid) traineeships and apprenticeships, allowing people to progress to paid employment in the sector without requiring volunteering experience (Davies, 2008).

There was no literature suggested for this review that considered diversity in the library workforce. However, case studies collected by the MLA suggest that individual library services have been active in this area (see for example a case study on the Leicestershire library service, MLA, 2011a), and CILIP (a professional body for librarians) also operates a positive action trainee scheme.

Section 7

CHILDREN AND YOUNG PEOPLE

Children and young people are a strong focus for museums and libraries; they are a core part of the audience for both sectors. 65 per cent of children have visited a museum at least once in the past 12 months, and 76 per cent have visited a library in the past 12 months (DCMS, 2011a). Museums are often used as family venues, with 'somewhere to take the children' as a motivation to visit for 23 per cent of visitors (BDRC Continental, 2010). The public believe that one of the core purposes of libraries is to support children's education and learning (Woodhouse, 2010). The sectors have been encouraged to focus on the engagement of children by research which shows that visiting libraries and museums as a child makes a person are more likely to visit as an adult (Stanziola, 2007); a focus on child engagement is an investment in future audiences. Another factor in encouraging a focus on children and young people is that local authority stakeholders are interested in museums and libraries working with children and young people because they see this as important to children and young people's attainment, health and self-esteem (Rowley, 2011).

7.1 Museums

Museums have focused on building children's use of museums for cultural or creative learning, particularly through increasing numbers of school visits and encouraging the use of museums as part of teaching and learning, as well as through out-of-school and holiday activities. Research in this area has provided case studies of good practice, though it can be difficult to pick out which elements of broad programmes of activity were most important to producing good outcomes. There is clear evidence that these activities have led to increased numbers of visits to museums by school-aged children,

including those from relatively high-deprivation areas (Hooper-Greenhill et al, 2006, Ecorys, 2011). Renaissance hub museums have been successful at increasing the numbers of children visiting museums because of wanting to return after a school trip; while such visits are a small number of all museum visits (3 per cent of the total in 2009/10), they are relatively more common among priority target groups (BDRC Continental, 2010).

Work in this area has often used a workforce skills development approach, supporting teacher training and developing the skills of museums staff, to build understanding of how museums can be a teaching resource. Workforce skills development has been used both as a stand-alone approach, and as part of wider programmes. There is good evidence that this approach has positive effects on teachers' perceptions of the value of museums for teaching, particularly if it shows how activities can be directly linked to the curriculum. This approach also builds reciprocal links between schools and museums (Hooper-Greenhill et al, 2006; BOP, 2011).

Quite a lot of the literature on the use of museums for children and young people seeks to demonstrate effects on learning outcomes. This literature is strongly shaped by the Inspiring Learning framework developed by the MLA, a self-assessment framework that helps organisations review their processes and measure their outcomes in relation to sets of indicators around learning and social outcomes. The evidence so far is insufficient for drawing a clear conclusion, partly because studies tend to look at the perceptions of teachers and pupils (eg whether teachers thought the visit would result in learning outcomes, rather than whether it actually did). There is promising evidence that museum visits with supplementary learning activities may improve 'soft skills' such as attitudes to school, self-confidence, social skills; and one study shows a museum's education programme improving students' writing test results (Ecorys, 2011; Newman et al, 2010, Stanley, 2008).

This review did not find literature on the quality of general museum services for children outside of the context of specific programmes. Programmes have tended to need substantial teacher and museum staff time, and financial resources; an unexplored question is how much schools and museums would continue their relationship without targeted funding to do so. There may be future challenges for this type of work due to government plans to strip back the curriculum

to core subjects and classroom-based teaching. There has been some exploration of the barriers teachers can face in visiting museums, such as administration, transport costs, and limited museum facilities for schools (Hooper-Greenhill et al, 2006); perhaps one way forward would be to explore ways of bringing museums to schools, through digital platforms or mobile collections.

In taking on responsibility for museums the Arts Council may create opportunities for stronger links between the arts and museums. In this respect, it is interesting that several studies of museum education work note the use of theatre – with characters acting out people from history – as an effective way of engaging students emotionally, in turn facilitating learning outcomes (Hooper-Greenhill et al, 2006; CEI, 2005).

7.2 Libraries

Public libraries appear to be very proactive in delivering their services for children and young people, and it is an area where further efforts are being made to improve services and increase engagement (DCMS, 2009). There are positive signs, with children's book issues on the rise at the same time as general book issues have been falling (DCMS, 2010b); and evidence that libraries are developing good practice around increasing and deepening young people's engagement as part of the wider community engagement agenda (Renaisi, 2011).

There is good evidence about the positive effects library services can have on children's skills: improvements in the quality of school libraries improves academic attainment; and public libraries can help to raise reading attainment and skills, for example through reading clubs and initiatives such as the Summer Reading Challenge (BOP, 2009; Newman et al, 2010). There is suggestive evidence that libraries can have positive impacts on pre-school and early years development, though further work is needed to establish this clearly (BOP, 2009).

On the other hand, there is a lack of basic data on the day-to-day activities of England's libraries in relation to children and young people (BOP, 2009), which makes it difficult to judge the nature or quality of the current offer for children and young people. There is a need for better baseline data to be collected.

One recent exception to this is school libraries, where research has looked at how the services are used and perceived by children and young people, and how they are delivered and operated (Douglas and Wilkinson, 2010). This research showed services varied in quality, and suggested some approaches to improving the service, including: ensuring all school library staff are trained in working with children; bringing school libraries more strongly into school infrastructure and development plans; and building stronger links between school libraries and public libraries.

Section 8

MEASURING AND PROVING IMPACT

Material for this review was gathered using recommendations from research and policy experts in the museum and library fields. A substantial proportion of the recommended literature – around a fifth – proved to be studies that seek to demonstrate the impact and value of the museum and library sectors. While this review does not aim to provide a full account of the impacts and value of the sectors, it is interesting to note where this literature indicates some specific challenges and opportunities.

Much of this literature has been commissioned by the MLA, by key sector bodies such as the Association of Independent Museums (AIM), or by museums and libraries themselves. It is perhaps a sign of these sectors' sense of a need to prove their value to funders that there is so much material in this area. In particular, many studies focus on accounting for value in terms of the priorities set by local government.

There is wide variation between studies in the methods used to measure value, and also in the elements of the museum or library offer that are examined. This may reflect varying conceptions of the role of museums or libraries, discussed in section 3. Many impact studies focus on contribution to the local economy, with particular emphasis on the visitor economy (eg Roger Tym and Partners, 2008; DC Research, 2010), and there is evidence that local and regional stakeholders are particularly interested in these types of financial calculations (Jura Consultants, 2008).

The sectors themselves believe this approach is too limited to demonstrate the full value of their activities, and tend to prefer approaches that capture wider value in quantitative terms, such as contingent valuation approaches or a return on investment approach; this has been argued particularly strongly in the case of libraries, as they do not tend to attract tourists (BOP, 2009; ERS, 2011; Jura Consultants, 2008). In recent years the MLA has advocated a specific version of such approaches, called social return on investment (Jura Consultants, 2008).

It has been argued that the sectors are not in a position to make best use of any of these approaches, due to a lack of robust data based on common indicators. It is recommended that therefore the first step must be for central government funders to provide guidance on standard terminology and data collection methods. In addition, it is recommended that funders work to build understanding among stakeholders of the contingent valuation and social return on investment methods (Jura Consultants, 2008).

IMPROVING THE EVIDENCE BASE

This review has found a wide range of evidence for the museum and library sectors. It is clear that the MLA has been very active in supporting research in these sectors, with many of the sources cited here having been published by the MLA.

One area of strength in the evidence base for museums is the range and depth of information on museum visitors and the visitor experience, particularly from the DCMS-managed Taking Part survey and MLA-funded exit surveys of visitors to Renaissance hub museums, as well as research on efforts to increase visits by school-aged children. It seems likely that this rich information has helped to drive improvements in attendance and visitor satisfaction ratings at these museums. Another area of strength in the evidence base is the substantial review of the Renaissance programme which has generated some key lessons to inform future developments.

There is weaker evidence in the museums sector in terms of other aspects of funded museums' operations besides visitor numbers and experience, and a lack of data on museums not funded by Renaissance. There is opportunity to put in place shared measures for data collection, focusing on a small set of key indicators (Renaissance Review Advisory Group, 2009).

Among libraries, there is very good basic information on a range of aspects of library operation from annual surveys run by CIPFA, and on national levels of engagement with libraries from Taking Part. The sector has also been active in using data to plan service developments, presumably due to the statutory requirement for library services to consider how they meet local needs (Local Government Group and MLA, 2011).

However, among libraries there is a lack of basic data on core services – the activities that take place in a library day-to-day. This is a gap that the MLA began to fill, publishing research on the range of health and wellbeing services, and digital participation activities, that libraries are engaged in. One interesting suggestion from the literature is a library 'census day', to capture more local-level information on library users, their activities, and their experiences (BOP, 2009).

A lot of the research in these sectors, including that commissioned by the MLA, has focused on case studies and evaluations of specific initiatives. This work is frequently successful at telling the story of what was done in any particular initiative, and often captures key outputs and participants' views on what worked. Such work is valuable for the accountability of funding, and can help deliverers and funders to understand how a similar activity might be best carried out and supported in the future. A limitation of such work is that it tends to focus on evaluating one-off, time-limited and pilot schemes. It can be difficult to understand how the findings generalise to day-to-day practice.

While there are some examples of excellent evaluations in the evidence reviewed here, there was also a lot of work that is less strong from a research methods perspective. There are studies of initiatives that are conducted before the initiative is completed, and certainly well before any long-term effects could be captured. Many studies do not use before-and-after comparisons to determine what difference a particular initiative made to organisations or participants, and rely on self-reported accounts of the difference made, which makes the findings less reliable. Studies often do not consider the added value of an initiative, in comparison to what would have happened without it. Finally, it is often difficult for evaluations to determine whether initiatives were successful because the initiatives did not have clear outcomes in place for which they were aiming. All these limitations mean that the evidence on the impacts of public funding for the funded organisations and wider sector, and for the general public, is often weaker than it could be. It would be helpful for initiatives and programmes to have more explicit outcomes with accompanying robust monitoring and evaluation systems specified at the outset (Renaissance Review Advisory Group, 2009; Jura Consultants 2009a, ERS, 2010).

There are some examples in the literature of studies designed to help justify future spending decisions, and great deal of the research is quite explicit about being presented for such advocacy purposes (eg Hooper-Greenhill et al, 2006). This approach to research can be risky: it can be tempting when presenting research for advocacy purposes to gloss over elements that did not go as well as they could have done, which in turn can limit our ability to learn how to improve (Anton, 2009). As was found in a similar literature review conducted for the arts sector, it seems there is a need to continue to strengthen the cultural sectors' ability to understand and value robust evidence and use it to improve practice (Bunting, 2010).

The evidence reviewed here suggests there is great value in continuing to work to improve knowledge-sharing among organisations in the museum and library sectors. One way in which the MLA did this was through capturing and disseminating case studies and good practice guidance (Anton, 2009; Renaissance Review Advisory Group, 2009). It would be interesting to explore in more detail how this material was used by the sector.

The MLA and the Arts Council have often worked in partnership on research, including through the Culture and Sport Evidence (CASE) programme – the ongoing research collaboration between DCMS, the Arts Council, MLA, English Heritage, and Sport England – and through the Taking Part survey which is managed by DCMS and funded by the same set of culture and sports sector bodies. This initial review of literature and evidence in the museum and library sectors, also conducted in collaboration with MLA colleagues, has helped the Arts Council to develop an evidence-based understanding of key opportunities and challenges in these sectors.

We now begin to consider ways to take forward the substantial evidence base that exists, and this review identifies some possible areas for further work:

- develop a small set of key indicators to support the museums sector to consistently report on its activities
- conduct a library 'census' day to capture more local-level information on library users, their activities, and their experiences
- undertake further analysis of the public value of libraries
- create more detailed segmentations of museum and library visitors and non-visitors
- consolidate the developing body of knowledge on community engagement and consider how it can be further grown
- continue to track new approaches to building sustainability, both in terms of business models and finances and in environmental activities
- build on the MLA work on measuring the impact and value of the sectors, including by developing shared terminology and data collection methods

Section 10

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