

## Beacon Policies for Museum Accreditation

**EXECUTIVE MEMBER:** Councillor Hugh Branney  
**LEAD OFFICER:** Julie Betteridge, Head of Regeneration & Community  
**REPORT AUTHOR:** Sue Palmer, Beacon & Tourism Services Manager

### WHAT BENEFITS WILL THESE PROPOSALS BRING TO COPELAND RESIDENTS?

- Approval of policies which ensure that Copeland's museum is operating in an appropriate, professional and ethical manner
- Maintain Accredited Museum status, demonstrating high service standards and protecting all external grant investment received where Accredited (or Registered) status has been a condition of funding
- The services provided by The Beacon assist the Council to deliver its Objectives, especially providing people with opportunities to build aspirations and to support their personal development; promoting opportunities for raising local skill levels; providing high performing services that are accessible and respond to customer needs. The Beacon uses external funds as well as Council revenue funding to be able to achieve these tasks. These funds would not be available without Accredited Status.

### WHY HAS THIS REPORT COME TO THE EXECUTIVE?

(eg Key Decision, Policy recommendation for Full Council, at request of Council,etc.)

To ensure that The Beacon retains its status as an Accredited Museum, it is essential that key policies are reviewed at least every five years.

The Beacon's policies and plans have been created or reviewed and updated in accordance with guidelines produced by Arts Council England.

### RECOMMENDATIONS:

That the Executive

A. Approve the Museum Policies to maintain Accredited Museum status

Or

B. Delegate authority to the Head of Service for Regeneration & Community and the Portfolio Holder to approve these policies following any required amends.

## 1. INTRODUCTION

- 1.1 Arts Council England operates an accredited quality standard scheme for museums, known as Accreditation.
- 1.2 The Beacon has been a Registered/Accredited Museum since 1998 (RD 145).
- 1.3 Arts Council England has invited the Beacon to apply for Accredited Status by 29 July 2012 and it essential that these policies are in place and have been approved by Copeland Borough Council.

## 2. PROPOSALS

- 2.1 As well as ensuring that The Beacon operates to the required Museum standards, Accreditation is a pre-requisite to obtaining grant funds from bodies such as Heritage Lottery or Arts Council England.
- 2.2 Loss of Accredited status would mean lack of future grants and possible “clawback” of funds previously awarded. This would include 2007 Beacon Redevelopment Funding from the Heritage Lottery Fund.
- 2.3 To ensure effective operation of the Beacon it is essential that key policies are reviewed every three to five years. The following policies have been reviewed and updated in accordance with current guidelines produced Arts Council England. Only the policies marked in bold require Council approval for Accreditation purposes and are being supplied with the Exec report.

- **Collections Development Policy 2012 - 2017**
- **Collections Documentation Policy & Plan 2012 – 2017**
- **Collections Care & Conservation Policy 2012 – 2017**
- **Collections Care & Conservation Plan 2012 - 2017**
- **Museum Forward Plan 2012/13** (based on Service Plan)
- Exhibitions & Events Policy 2012 - 2015
- Learning & Access Policy 2012 - 2015
- Documentation Procedural Manual 2012 edition
- Emergency Policy 2012 - 2015
- Emergency Plan 2012 edition

All other policies and plans are available from The Beacon should members wish to see them ([spalmer@copelandbc.gov.uk](mailto:spalmer@copelandbc.gov.uk)).

- 2.4 The Accreditation application is completed online with policy and other documents submitted as hard copy and/or retained at The Beacon for inspection.
- 2.5 A clear Council minute appropriately signed and dated must be submitted to demonstrate approval of policies as part of the Accreditation application.
- 2.6 The **Collections Development Policy** was previously known as the Acquisition & Disposal Policy.

Revised in accordance with Arts Council England's current template and required wording.

New additions include the "rationalisation" of collections. This involves the review of the collections to ensure that they comply with the acquisition rules and that they are relevant to Copeland. Where any artefacts are found which don't comply, recommendations will be made via the Curator for transfer of these items to an alternative repository (such as another museum or archive). This transfer is conducted by closely following SPECTRUM procedures (sector specific processes and rules).

- 2.7 The **Documentation Policy and Plan 2012 – 2017** and **Collections Care & Conservation Policy and Plan 2012 – 2017** are new requirements for Exec approval, and are based on a previous Documentation and Conservation Policies.
- 2.9 The **Museum Forward Plan 2012 / 13** is based on The Beacon's Service Plan 2012 / 13 but requires additional information such as an introductory section to provide greater context, expanded aims and objectives, and brief details of customer consultation activities. In the past approved by Head of Service, approval of this Plan at Executive level is now required.

### **3. ALTERNATIVE OPTIONS TO BE CONSIDERED**

- 3.1 If Copeland fails to apply for Accreditation or fails to meet the required standards, Accreditation status will be lost and the Council is at risk of grant clawbacks.
- 3.2 If policy approval is delayed beyond 29 July 2012 but the application is otherwise complete, PROVISIONAL Accredited status may be given with a further deadline for submitting policy approval evidence. This would restrict any new or on-going external grants or artefact loans from other Accredited museums during the interim period.

#### **4. CONCLUSIONS**

- 4.1 The Beacon is an Accredited Museum which meets or exceeds the requirements for Accreditation. This status is under review.
- 4.2 Good practice requires the regular review of the museum's policies to ensure that they meet the Arts Council England and Council's objectives.
- 4.3 Following review, specific policies require approval by Copeland Borough Council to enable the online Accreditation application with Arts Council England to proceed.

#### **5. STATUTORY OFFICER COMMENTS**

5.1 The Monitoring Officer's comments are: The report offers appropriate options for approval of policies or their delegation to an officer in consultation with the Portfolio Holder.

5.2 The Section 151 Officer's comments are:

The author of the report has provided assurance in 6.5 that the policies and plans are contained within the current council revenue funding or already secured external grants, and therefore no requests for additional funds arise from this report.

The collections development policy sets out criteria for disposal and acquisition primarily from a curatorial basis. In addition any disposal or acquisition would need to comply with the councils financial regulations and contract procedures rules which have been updated and agreed by council in June 2012. Financial regulations now include specific elements relating to approval in advance of future bids for grants and applications for external funding.

5.3 EIA Comments: A draft EIA is undergoing Beacon team consultation at present. The policies featured within this report are unlikely to have any negative impact on different sections of the community. Alternative formats will be made available on request. Access to policy documents via The Beacon's or Copeland's websites mean that BrowseAloud or similar software is immediately available.

5.4 Other consultee comments, if any: None

**6. HOW WILL THE PROPOSALS BE PROJECT MANAGED AND HOW ARE THE RISKS GOING TO BE MANAGED?**

- 6.1 The Beacon & Tourism Services Manager is completing the online application and providing all required evidence to the Arts Council England.
- 6.2 Any signed Statement of Declaration on behalf of Copeland for the application will be provided by the Head of Regeneration & Community.
- 6.3 The policies have been reviewed following team and stakeholder consultations.
- 6.4 Loss of Registered or Accredited status would have a serious impact on the public's perception of the museum service offered and would put future external inward investment at risk. Any funds obtained whilst being Registered/Accredited, for instance for redevelopment in 2007, would also be at risk of reclaim.
- 6.5 Any funds or estimated costs referred to in the Policies and Plans relate to staff time, are achievable within current revenue funding or are externally funded projects (subject to successful applications). Copeland is not being asked for additional funding as these policies relate to tasks which are already core functions of the museum service.

**7. WHAT MEASURABLE OUTCOMES OR OUTPUTS WILL ARISE FROM THIS REPORT?**

- 7.1 Completion of online Accreditation application by deadline 29 July 2012.
- 7.2 If application is successful, receipt of Accreditation certificate and report in due course.

**List of Appendices**

- Appendix A – Collections Development Policy 2012 – 2017
- Appendix B – Collections Documentation Policy & Plan 2012 – 2017 (combined)
- Appendix C – Collections Care & Conservation Policy 2012 – 2017
- Appendix D – Collections Care & Conservation Plan 2012 – 2017
  - Appendix D1 Housekeeping Checklist
- Appendix E – Beacon Museum Forward Plan 2012/13
  - Appendix E1 The Beacon Budget Book 2012/2013

**List of Background Documents:**

Available as required from [spalmer@copelandbc.gov.uk](mailto:spalmer@copelandbc.gov.uk) -

Exhibitions & Events Policy 2012 - 2015

Learning & Access Policy 2012 - 2015

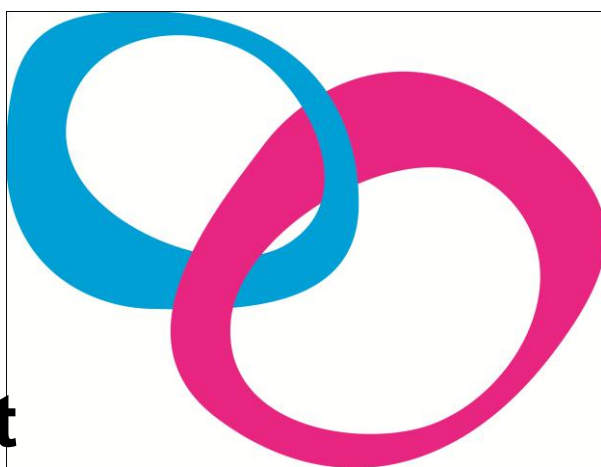
Documentation Procedural Manual 2012 edition

Emergency Policy 2012 - 2015

Emergency Plan 2012 edition

# Copeland Borough Council – The Beacon Museum

## Collections Development Policy



**2012 – 2017**

Version 2:9/5/2012



*Proud of our past. Energised for our future.*

**Name of museum:** The Beacon Museum, Whitehaven

**Name of governing body:** Copeland Borough Council

**Date on which this policy was approved by governing body:** to be added

**Date at which this policy is due for review:** July 2017

## **1. Museum's statement of purpose**

### ***The Beacon's Mission is***

***"To enable everyone to explore Copeland's rich and diverse history by collecting, preserving, interpreting, and displaying artefacts for inspiration, learning and enjoyment."***

## **2. An overview of current collections**

**2.1 Copeland** – With the exception of a small number of towns, much of Copeland is rural landscape or developments along the coast. This rural nature is part of Copeland's charm but also adds to its isolation, being about an hours drive away from the nearest motorway. The sea and coast have been used since prehistoric times for fishing, and later for salt, shipping and shipbuilding industries. Evidence of agriculture dates from Neolithic times and Herdwick sheep farming from before the Viking settlements. Mining for coal and iron took place across the Borough for many centuries, coming to an end during the closing years of the 20<sup>th</sup> century. These have now been replaced by light industry, nuclear reprocessing, and tourism.

### **2.2 Origins of The Beacon's collections**

Originated by the Whitehaven Scientific Association, Copeland's early collections were begun in the mid 19<sup>th</sup> century, in the Association's Howgill Street premises, Whitehaven. These early collections comprised mostly items of fine and decorative art, natural history, prints and books. Finds of archaeology and social history ephemera, numismatics, photographs and maps formed later additions.

The nucleus of existing collections, they were later housed and exhibited in an early museum run by Whitehaven Town Council in the Public Library on Catherine Street. In 1974, Local Government Reorganisation resulted in the transfer of the collections to Copeland Borough Council. The museum collections were displayed in the Old Market Hall, Market Place, Whitehaven, in 1975. The museum was later relocated to the Civic Hall's Dunboyne Hall in 1987 where it remained until 1996 when the purpose-built Beacon was completed on the harbourside. The Beacon and its associated Resource Centre are now the permanent homes for Copeland's Museum Collection.

More recently The Beacon has undergone complete refurbishment (2007-08) and added further new galleries during 2011 and 2012. It has seen the establishment of new storage areas for its fine art collections, new thematic displays throughout, a refurbished Harbour Gallery for temporary and touring exhibitions and has seen many artefacts exhibited for the first time following a major programme of conservation work.



**The total collection now numbers over 30,000 items covering the following subject areas:-**

**2.2.1 Social History** – A broad range of artefacts relating to the communal, domestic, personal and working life of the people of Copeland since Medieval times. The collection includes items which relate to coal mining, iron mining, shipbuilding and maritime history, local industry and technological developments, agriculture and rural crafts, costumes, military history and archival materials and ephemera.

(11,624 items)

**Comment [b1]:** 11624 on modes social history file

**2.2.2 Fine Art** – A collection of paintings, water-colours, drawings and sculpture either by local artists or works that depict local views or local people. The collection includes an important group of maritime paintings featuring nationally and internationally renowned marine artists such as Joseph Heard who lived and worked in Whitehaven before moving to Liverpool in 1832 and Whitehaven-born Robert Salmon whose work was much influenced by Dutch marine painters of the period.

(1,179 items)

**2.2.3 Decorative Arts** –The decorative art collections include substantial amounts of 19<sup>th</sup> century Whitehaven-made pottery, silverware and ceramics commemorating the launch of local ships and an exemplary 18<sup>th</sup> century enamelled glass goblet by William Beilby. Beilby was the first person in England to fire enamels into glass so that the enamel almost became part of the glass itself. The Beacon's Beilby goblet commemorates the launch of the King George slave ship and commends "Success to the African Trade of Whitehaven". (709 items)

**2.2.4 Archaeology** – A varied collection of local archaeology including the St Bees Shroud c1300AD; the d'Irton tombstone; a 'series' of quernstones; a glass bottle from Hardknott Roman Fort; some bulk archaeology and three excavation archives. The St Bees Shroud and associated artefacts are well known locally and are displayed at St Bees Priory Church, the site of their excavation and as part of a Medieval lead coffin burial during the 1980s. (430 items)

**2.2.5 Natural Sciences** –Comprises a large geology collection; an herbarium; a small collection of stuffed birds, animals and birds' eggs. (2,044 specimens)

**2.2.6 Numismatics** – These include 131 local trade tokens used in 19<sup>th</sup> century and a number of coins found in the Borough. These range from early Roman examples to a 2007 issue, £2 coin to commemorate the 200<sup>th</sup> anniversary of the abolition of the slave trade.

**2.2.7 Photographs** – A strong local collection of photographic prints, postcards, glass plate negatives, magic lantern slides, 35mm slides and over 5000 black and white negatives relating to Copeland, especially its towns, harbours, shops and people. Frequent requests are made to view the photographic collection and plans are underway to digitise the entire collection and make it accessible via gallery information points and online via the Beacon's website. (10,107 photographs, 5000 plus B/W negatives)

**2.2.8 Prints** – A small collection of engravings, etchings and lithographs of local places or people. (110 items)

**2.2.9 Books** –A library of over two and a half thousand books on a variety of subjects, mainly relating to the existing collections and history of Copeland. They also include bound newspapers such as the 18<sup>th</sup> century Cumberland Pacquet and Cumberland Chronicle papers, and the Whitehaven News since 1907. Due to their fragility access to these items is restricted and researchers are supervised on a one to one basis. The Beacon is working in partnership with Cumbria County Record Office and Archivesto review its collecting policy relating to archives and

ephemera and with the aim of cataloguing its Library collections more effectively to improve it as a research facility and learning resource and thus increase its use. (2,663 books)

**2.2.10 Maps** – A combination of both originals and copies of maps and plans relating to Copeland. (1,689 items)

### **3. Themes and priorities for future collecting**

**3.1 Enhancing Existing Collections** Following the completion of a major cataloguing project up to 1997 and subsequent audits, the strengths and weaknesses of the collection are clear. Strengths include; maritime paintings, an extensive photographic collection, Victorian costume and 19<sup>th</sup> century Whitehaven-made ceramics whilst areas for re-consideration and concern include; the geology and stuffed animal and bird collections. This is due to a combination of lack of expertise and overall poor condition of the specimens. During the next five years the Beacon will continue to collect items which 'address the gaps' highlighted by this process. (e.g. Copeland since the 1940s; examples of gentlemen's clothing and World War 2 items) with the intention of deepening and enriching the existing collections.

**3.2 Resource considerations** Collecting will take place providing that suitable accommodation (display and/or storage within appropriate environmental conditions) is available supported by staff time and skills for accessioning, cataloguing, research, cleaning, etc. Financial resources must also be available and in place for purchases or for preventative and remedial conservation.

**3.3 Contemporary Collecting** The Beacon will acquire items made by contemporary artists and makers where relevant to Copeland and will collect artefacts which represent Copeland's many communities since the 1940s.

#### **3.4 Period of time and / or geographical area to which collecting relates**

**3.4.1** The Beacon has a responsibility to preserve and display or make available for study, evidence of human and natural history of the Copeland area, the boundaries of which were designated under the Local Government reorganisation of 1974.

**3.4.2** In certain fields (including geology and geology based-industries, maritime history and photographic record work), these man-made boundaries are inconsistent with the proper understanding and presentation of the subject and some 'overlap' with adjacent areas is unavoidable. Where any possible conflict of interest might arise between museum collecting areas, this will be resolved by negotiation and mutual agreement. For specific organisations see section 6.

**3.4.3** As all periods of history are represented by The Beacon's collection, future collecting will not be restricted to specific periods of time.

#### **3.5 Subjects/ Themes for active collecting:-**

**3.5.1 Social History** All aspects, especially coal mining and maritime history as they form key elements in the historical development of the area. New areas for collecting include the history of climbing and mountaineering in the Copeland area.

**3.5.2 Costume** Examples of uniforms or work-wear from the 1920s to the present day will be collected in particular, plus examples of male costume, providing that they have been worn or made locally and are of display quality.

**3.5.3 Contemporary** material will be collected wherever possible in addition to 1950s memorabilia and 1980s clothes, games and music illustrating 20th Century life in Copeland. Archival material will only be collected where it relates directly to the specimens in the collection or assists in the

interpretation of the history of the area (potential donors will be advised to contact the Whitehaven Record Office and Local Studies Library as a possible, alternative repository).

**3.5.4 Fine Art** The Beacon will continue to add to the fine art collection when opportunities arise and resources are available providing that the item refers to a local subject/ theme or has been created by a local artist.

**3.5.5 Decorative Art** Some additions will be made to the collection of Whitehaven-made ceramics. It is also intended that the scope of this collection be widened to include contemporary Whitehaven ceramics and glassware where appropriate.

**3.5.6 Geological specimens** will continue to be collected, drawing expert guidance from subject specialist groups and volunteers.

**3.5.7 Photographs, postcards and prints** The Beacon will actively add to its photographic collection in the form of original prints and negatives, and also as copy negatives. This policy also applies to postcards and prints.

**3.5.8 Books** will be added to the collection only where the subject relates directly to Copeland and its history (potential donors will be advised to contact Whitehaven Record Office and Local Studies Library as a possible, alternative repository).

**3.5.9 Archaeology** Single finds will be accepted into the collection if there is a direct link to the area and the item is of historical and aesthetic value and suitable for display. We will not accept large quantities of bulk finds from excavations or unidentified material.

**3.6 The following list indicates those subjects where The Beacon does not intend to add to the existing collections -:**

**3.6.1 Archaeological excavated material** It is not possible for The Beacon to accept large archives (i.e. over 30 boxes) from archaeological excavations due to storage limitations. Currently Tullie House at Carlisle serves as the main repository for such collections. Storage difficulties at Tullie House require that this issue be regularly reviewed by their Keeper of Archaeology and the Curator at The Beacon and policies amended where necessary.

**3.6.2 Natural History** For the period of this Policy there will be no expansion to the collection of natural history specimens (excluding geology) due to storage restrictions and the lack of specialist expertise.

**3.6.3 Paper Archives** The Beacon will only add to its collection of paper archives with the agreement of Cumbria County Council Record Office and Archive Service, Whitehaven.

**3.6.4 Duplicates** of items already in the collection will not be accepted unless they are in better condition than the existing example.

#### **4. Themes and priorities for rationalisation and disposal**

Responsible, curatorially-motivated disposal takes place as part of the museum's long-term collections policy, in order to increase public benefit derived from museum collections<sup>1</sup>. Following a Collections Review during 2011/12 of the Social History, Natural History and Fine Art collections, a list of items has been prepared by the Beacon Curator for consideration for disposal by Copeland Borough Council's Executive Committee during 2012/13. These include artefact duplicates and items which do not relate to the Borough of Copeland. Should the Committee agree to the

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<sup>1</sup> See Museums Association 'Disposals Toolkit' pg 5.

Curator's rationalisation recommendations, disposal will be conducted according to this policy and in particular will refer to clauses 13 (e) and 13 (f).

Where possible, the artefacts will be transferred to other appropriate institutions.

## **5. Limitations on collecting**

The Beacon recognises its responsibility, in acquiring additions to its collections, to ensure that care of collections, documentation arrangements and use of collections will meet the requirements of the Accreditation Standard. It will take into account limitations on collecting imposed by such factors as inadequate staffing, storage and care of collection arrangements.

## **6. Collecting policies of other museums**

The museum will take account of the collecting policies of other museums and other organisations collecting in the same or related areas or subject fields. It will consult with these organisations where conflicts of interest may arise or to define areas of specialism, in order to avoid unnecessary duplication and waste of resources.

Specific reference is made to the following museum(s):

Haig Colliery Mining Museum  
Helena Thompson Museum  
Kendal Museum  
Keswick Museum  
Millom Folk Museum  
Senhouse Roman Museum  
Tullie House Museum Trust  
Whitehaven Record Office and Local Studies Library (Cumbria County Council)

## **7. Policy review procedure**

The acquisition and disposal policy will be published and reviewed from time to time, at least once every five years. The date when the policy is next due for review is noted above.

Arts Council England will be notified of any changes to the acquisition and disposal policy, and the implications of any such changes for the future of existing collections.

## **8. Acquisitions not covered by the policy**

Acquisitions outside the current stated policy will only be made in very exceptional circumstances, and then only after proper consideration by the governing body of the museum itself, having regard to the interests of other museums.

## **9. Acquisition procedures**

- a. The museum will exercise due diligence and make every effort not to acquire, whether by purchase, gift, bequest or exchange, any object or specimen unless the governing body or responsible officer is satisfied that the museum can acquire a valid title to the item in question.
- b. In particular, The Beacon will not acquire any object or specimen unless it is satisfied that the object or specimen has not been acquired in, or exported from, its country of origin (or any intermediate country in which it may have been legally owned) in violation

of that country's laws. (For the purposes of this paragraph 'country of origin' includes the United Kingdom).

- c. In accordance with the provisions of the UNESCO 1970 Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property, which the UK ratified with effect from November 1 2002, and the Dealing in Cultural Objects (Offences) Act 2003, the museum will reject any items that have been illicitly traded. The governing body will be guided by the national guidance on the responsible acquisition of cultural property issued by the Department for Culture, Media and Sport in 2005.
- d. So far as biological and geological material is concerned, The Beacon will not acquire by any direct or indirect means any specimen that has been collected, sold or otherwise transferred in contravention of any national or international wildlife protection or natural history conservation law or treaty of the United Kingdom or any other country, except with the express consent of an appropriate outside authority.
- e. The museum will not acquire archaeological antiquities (including excavated ceramics) in any case where the governing body or responsible officer has any suspicion that the circumstances of their recovery involved a failure to follow the appropriate legal procedures.

In England, Wales and Northern Ireland the procedures include reporting finds to the landowner or occupier of the land and to the proper authorities in the case of possible treasure as defined by the Treasure Act 1996.

- f. Any exceptions to the above clauses 8a, 8b, 8c, or 8e will only be because the museum is:
  - acting as an externally approved repository of last resort for material of local (UK) origin
  - acquiring an item of minor importance that lacks secure ownership history but in the best judgement of experts in the field concerned has not been illicitly traded
  - acting with the permission of authorities with the requisite jurisdiction in the country of origin
  - in possession of reliable documentary evidence that the item was exported from its country of origin before 1970

In these cases the museum will be open and transparent in the way it makes decisions and will act only with the express consent of an appropriate outside authority.

- g. As the museum holds or intends to acquire human remains from any period, it will follow the procedures in the 'Guidance for the care of human remains in museums' issued by DCMS in 2005.

## **10. Spoliation**

The museum will use the statement of principles 'Spoliation of Works of Art during the Nazi, Holocaust and World War II period', issued for non-national museums in 1999 by the Museums and Galleries Commission.

## **11. The Repatriation and Restitution of objects and human remains**

The museum's governing body, acting on the advice of the museum's professional staff, if any, may take a decision to return human remains (unless covered by the 'Guidance for the care of human remains in museums' issued by DCMS in 2005), objects or specimens to a country or people of origin. The museum will take such decisions on a case by case basis; within its legal position and taking into account all ethical implications and available guidance. This will mean that the procedures described in 13a-13d, 13g and 13o/s below will be followed but the remaining procedures are not appropriate.

The disposal of human remains from museums in England, Northern Ireland and Wales will follow the procedures in the 'Guidance for the care of human remains in museums'.

## **12. Management of archives**

As The Beacon holds archives, including photographs and printed ephemera, its governing body will be guided by the Code of Practice on Archives for Museums and Galleries in the United Kingdom (third edition, 2002).

## **13. Disposal procedures**

### ***Disposal preliminaries***

- a. The governing body will ensure that the disposal process is carried out openly and with transparency.
- b. By definition, the museum has a long-term purpose and holds collections in trust for society in relation to its stated objectives. The governing body therefore accepts the principle that sound curatorial reasons for disposal must be established before consideration is given to the disposal of any items in the museum's collection.
- c. The museum will confirm that it is legally free to dispose of an item and agreements on disposal made with donors will be taken into account.
- d. When disposal of a museum object is being considered, the museum will establish if it was acquired with the aid of an external funding organisation. In such cases, any conditions attached to the original grant will be followed. This may include repayment of the original grant and a proportion of the proceeds if the item is disposed of by sale.

### ***Motivation for disposal and method of disposal***

- e. When disposal is motivated by curatorial reasons the procedures outlined in paragraphs 13g-13s will be followed and the method of disposal may be by gift, sale or exchange.
- f. The museum will not undertake disposal motivated principally by financial reasons

### ***The disposal decision-making process***

- g. Whether the disposal is motivated either by curatorial or financial reasons, the decision to dispose of material from the collections will be taken by the governing body only after full consideration of the reasons for disposal. Other factors including the public benefit, the implications for the museum's collections and collections held by museums and other organisations collecting the same material or in related fields will be considered. External expert advice will be obtained and the views of stakeholders such as donors,

researchers, local and source communities and others served by the museum will also be sought.

#### ***Responsibility for disposal decision-making***

- h. A decision to dispose of a specimen or object, whether by gift, exchange, sale or destruction (in the case of an item too badly damaged or deteriorated to be of any use for the purposes of the collections or for reasons of health and safety), will be the responsibility of the governing body of the museum acting on the advice of professional curatorial staff, if any, and not of the curator of the collection acting alone.

#### ***Use of proceeds of sale***

- i. Any monies received by the museum governing body from the disposal of items will be applied for the benefit of the collections. This normally means the purchase of further acquisitions. In exceptional cases, improvements relating to the care of collections in order to meet or exceed Accreditation requirements relating to the risk of damage to and deterioration of the collections may be justifiable. Any monies received in compensation for the damage, loss or destruction of items will be applied in the same way. Advice on those cases where the monies are intended to be used for the care of collections will be sought from the Arts Council England.
- j. The proceeds of a sale will be ring-fenced so it can be demonstrated that they are spent in a manner compatible with the requirements of the Accreditation standard.

#### ***Disposal by gift or sale***

- k. Once a decision to dispose of material in the collection has been taken, priority will be given to retaining it within the public domain, unless it is to be destroyed. It will therefore be offered in the first instance, by gift or sale, directly to other Accredited Museums likely to be interested in its acquisition.
- l. If the material is not acquired by any Accredited Museums to which it was offered directly as a gift or for sale, then the museum community at large will be advised of the intention to dispose of the material, normally through an announcement in the Museums Association's Museums Journal, and in other specialist journals where appropriate.
- m. The announcement relating to gift or sale will indicate the number and nature of specimens or objects involved, and the basis on which the material will be transferred to another institution. Preference will be given to expressions of interest from other Accredited Museums. A period of at least two months will be allowed for an interest in acquiring the material to be expressed. At the end of this period, if no expressions of interest have been received, the museum may consider disposing of the material to other interested individuals and organisations giving priority to organisations in the public domain.

#### ***Disposal by exchange***

- n. The nature of disposal by exchange means that the museum will not necessarily be in a position to exchange the material with another Accredited museum. The governing body will therefore ensure that issues relating to accountability and impartiality are carefully considered to avoid undue influence on its decision-making process.
- o. In cases where the governing body wishes for sound curatorial reasons to exchange material directly with Accredited or unaccredited museums, with other organisations or

with individuals, the procedures in paragraphs 13a-13d and 13g-13h will be followed as will the procedures in paragraphs 13p-13s.

- p. If the exchange is proposed to be made with a specific Accredited museum, other Accredited museums which collect in the same or related areas will be directly notified of the proposal and their comments will be requested.
- q. If the exchange is proposed with a non-accredited museum, with another type of organisation or with an individual, the museum will make an announcement in the Museums Journal and in other specialist journals where appropriate.
- r. Both the notification and announcement must provide information on the number and nature of the specimens or objects involved both in the museum's collection and those intended to be acquired in exchange. A period of at least two months must be allowed for comments to be received. At the end of this period, the governing body must consider the comments before a final decision on the exchange is made.

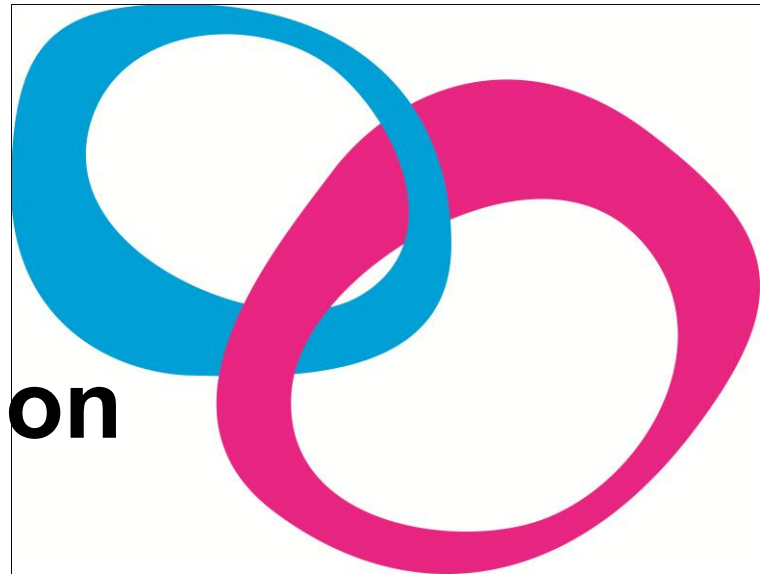
#### ***Documenting disposal***

- s. Full records will be kept of all decisions on disposals and the items involved and proper arrangements made for the preservation and/or transfer, as appropriate, of the documentation relating to the items concerned, including photographic records where practicable in accordance with SPECTRUM Procedure on deaccession and disposal.



# Copeland Borough Council – The Beacon Museum

## Collections Documentation Policy



2012 – 2017

Version 2:28/5/2012



*Proud of our past. Energised for our future.*

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# Collections Documentation Policy

## 1.0 Statement of Purpose

### *The Beacon's Mission*

***“To enable everyone to explore Copeland's unique history by collecting, preserving, interpreting and displaying artefacts for inspiration, learning and enjoyment.”***

The purpose of this Policy is to set out the Beacon's specific aims and objectives, 2012 – 2017 in relation to the documentation of Copeland's collections. Accurate and up-to-date, documentation is a pre-requisite of making our collections available to everyone through permanent display, temporary exhibitions, loans, handling and learning activities and through the world-wide web. In this way this plan supports the Beacon's wider aims (Forward Plan 2012-2013) and vision above.

### **Aims**

- To ensure the collections are fully documented and kept up-to-date
- To maintain the highest possible standards in documentation procedures and collection information
- To provide the greatest level of access to Copeland's museum collections and associated information
- To strengthen the security of the collections

**Please read this document in conjunction with The Beacon's Forward Plan 2012 – 2013 (and subsequent years), Collections Development Policy, Collections Care & Conservation Policy & Plan and the Documentation Manual.**

## 2.0 Background

### 2.1 Pre-1994 & Now

From 1975 to 1989 collection documentation was based on an accession register system, with information transferred from a daily diary to the register on a regular basis. With the departure of the then Assistant Curator, all formal accessioning stopped and as an interim measure between 1989 and 1994, labels detailing the donor's names and addresses were left with objects for acquisition.

2.1.2 Great progress has been made since that time; between 1994 and 1997 a substantial documentation project was undertaken and subsequently all objects entering the collections have been recorded. As such, there is no backlog of objects needing to be accessioned and a computer-based catalogue of the entire collection to date, is complete.

2.1.3 Editing of records is only carried out by the Curator, the Beacon Manager or by specifically trained Visitor Host(s). The collection catalogue is available for use by staff to assist visitors and researchers with enquiries. The Accession Register is up-to-date,

and a security copy of the register on archival paper is created and maintained by the Curator and stored off-site at the Resource Centre.

## **2.2 Computerised Documentation**

2.2.1 During the mid 1990s information began to be recorded on computer using MODES software (later MODES Plus and Modes for Windows). This is about to be updated to the MODES Complete version.

2.2.2 The total collection numbers around 30,000 items and records for all of these are available on MODES. It is required that all new and current donations and associated computer cataloguing will be completed within three months of deposit.

## **2.3 On-line Access**

2.3.1 A project began in 2005 to digitise the collections for public use on a computer-based gallery interactive and via the Beacon's website (collections online hosted by MUA), making Copeland's collections available on the internet for the first time. The Fine Art, Decorative Arts and Archaeology collections are available online via [www.thebeacon-whitehaven.co.uk](http://www.thebeacon-whitehaven.co.uk).

## **2.4 Beacon re-development 2007- 08 and implications for documentation**

2.4.1 The Beacon underwent a programme of complete refurbishment in 2007-08 with new interpretation, upgraded galleries, new storage areas for its fine art collections and state of the art learning equipment. Importantly a major, first phase programme of conservation work was completed allowing more objects to be displayed, many for the first time.

2.4.1 As a result, a substantial amount of re-location and conservation information was added to the object records during 2008 following SPECTRUM Standards.

## **2.5 Digitisation projects 2010-11**

2.5.1 An externally-funded (Future Jobs Fund) Digitisation Assistant post during 2010-11 meant that a substantial amount of the museum's photographs, prints and paintings have now been digitised.

2.5.2 Involvement in the Public Catalogue Foundation's work to digitise all paintings in the museums in Cumbria took place during Summer 2011. The Curator is awaiting receipt of the digital images taken during this project to enhance existing records on MODES, online and available in the gallery.

## **2.6 Unidentified Items**

2.6.1 During a 2006/07 inventory of the fine art and photographic collections, some framed items had been located in the Painting Store without accession numbers or provenance. The retrospective documentation for these items was completed in December 2008.

## **3.0 Current Position**

### **3.1 Spectrum standards**

3.1.1 SPECTRUM is recognised internationally as the leading standard for collections management. It contains detailed procedures for managing the processes that an object goes through during its lifecycle in a museum.

3.1.2 In order to meet the documentation requirements for the Arts Council England's Accreditation Scheme, the museum must maintain SPECTRUM Minimum Standards for the following Primary Procedures –

- Object Entry
- Acquisitions
- Location & Movement Control
- Cataloguing
- Object Exit
- Loans In
- Loans Out
- Retrospective Documentation

3.1.3 The Beacon's Documentation Manual (version 4, 2012) contains full details of the current documentation processes, SPECTRUM minimum standards and workflow diagrams.

### **3.2 Object Entry**

3.2.1 Definition – “The management and documentation of the receipt of objects and associated information which are not currently part of the collections. Any object which does not currently have an object number assigned by the receiving institution must be dealt with within this procedure” (SPECTRUM).

3.2.2 The Beacon must take the same care of objects not belonging to the collection as it would of its own objects as a matter of good working practice as well as to avoiding any loss or damage. Entry records log every item which is left in the care of the museum at the time of its arrival. Entry documentation applies to all potential gifts or purchases, loans for exhibition, and items to be identified, even if they are only in the museum for a short time.

#### **3.2.2 Current procedure at The Beacon :**

- All objects entering the museum are recorded on MDA Entry Forms. Each form has a controlled Entry or “E” number to avoid duplication.
- The Entry Form can be completed by the Curator, Manager or another trained member of the team.
- As a minimum, the following information is recorded using black ink : depositor's name, address and phone number (and owner if different), number and description of the items deposited, reason for entry, return date (if applicable).

- After reading the “Conditions of Deposit” overleaf, the form is signed by the Depositor (twice if transfer of title applies) and by the museum representative.
- The white copy of this form is filed in running number order (Entry Forms File). The pink copy goes to the Depositor as a receipt. The blue copy stays with the object until it is returned (with “Return of Object” box completed) or accessioned (Collection History Files MUS/97).
- A label or temporary mark featuring the Entry number is applied to the object or its packaging.
- Curator completes a condition check and photographs the artefact(s).

**For action –**

Annual refresher training of Object Entry procedures for all staff

Target Deadline: 31 March 2013 and subsequent years

**3.3 Acquisitions**

3.3.1 Definition - “Documenting and managing the addition of objects and associated information to the collections of the organisation and their possible accession to the permanent collections” (SPECTRUM).

3.3.2 Accessioning is the formal acceptance of all permanent acquisitions (whether by gift, purchase or bequest) into the museum collection. It is achieved by legally transferring ownership of an object to the museum and then formally adding the object to the museum’s collection. Accessioning involves recording the acquisition in an Accessions Register and adding a label or mark to the object bearing its Accession Number.

**3.3.3 Current procedure at The Beacon :**

- The Curator and Manager have delegated authority from Copeland Borough Council to formally accept items into the museum collection, in accordance with the Collections Development Policy.
- Transfer of title is made upon signing the relevant section of the Entry Form. Any “Special Conditions” may be noted on the reverse of the Entry Form. The Entry Form/Transfer of Title may be supported by additional correspondence such as an extract from a will in the case of a bequest.
- The Beacon is using its fifth accession register. All are archival quality bound registers and black permanent ink is used to fill in artefact details.
- Securely kept in the Curator’s office, only the Curator, Manager or trained member of staff may complete the accession register.
- Accession numbers comprise the museum prefix code WHHMG:, followed by the year then running number (e.g. WHHMG:2012.6).
- The accession number is applied to the artefact using MDA guidance for labelling and marking objects.
- Copy of the “thank you” letter and blue copy of entry form, along with any other supporting documentation, are filed in Collection History files in Accession Number order.
- A security copy of the Accessions Register is maintained, checked by the Curator every six months, and stored off site at the Museum Resource Centre.

3.3.4 All objects have been entered into Accession Registers; no backlog of accessioning exists.

3.3.5 Where possible, objects are being catalogued onto the MODES computer database at the time of accessioning to avoid the build up of a digital backlog.

### **3.4 Location and Movement Control**

3.4.1 Definition - "The documentation and management of information concerning the current and past locations of all objects or groups of objects in the organisation's care to ensure the organisation can locate any objects at any time" (SPECTRUM).

#### **3.4.2 Current procedure at The Beacon :**

- The Beacon's Curator or Manager may authorise the relocation of an object; any member of the Beacon team who has experience in handling artefacts may be responsible for moving the object.
- MDA Object Movement tickets are used to record temporary or permanent changes of artefact location within the museum premises (for example from the Resource Centre to the Beacon). The 3 ticket copies are used to "flag" the original location, accompany the artefact as it is relocated and for the Curator to update the MODES location records within 5 working days.
- MDA Exit Forms (sometimes combined with a Loans Out form) record the movement of artefacts to other Council premises or external organisations (for instance, other Accredited Museums).
- The records for each object on MODES feature both temporary and permanent location details, always accompanied by a date when either the movement took place or when an inventory/condition check was conducted. Permanent location relates to where the object is normally displayed or stored. Temporary location records where the object is when it's not at its usual location. Additional fields are added for each location change so a picture can build up of how an object has been moved around the museum.
- Cataloguing information on MODES enables location enquiries to be made down to box number or display case level. Such searches may be based on object number, location name or a variety of indexes or keywords.

### **3.5 Cataloguing**

3.5.1 Definition - "The compilation and maintenance of key information, formally identifying and describing objects. It may include information concerning the provenance of objects and also collections management documentation e.g. details of acquisition, conservation, exhibition and loan history, and location history. It need not bring together in one location everything known about an object, but should provide cross-references to any other relevant information sources known to the organisation" (SPECTRUM).

#### **3.5.2 Current procedure at The Beacon :**

- New acquisitions are catalogued onto MODES within three months of receipt.

- The artefacts are catalogued with as much information as available – the database does not hold any minimal records.
- The Curator, Manager and specifically trained staff are able to use MODES. All understand the template options and terminology controls required from the system and are trained to provide sufficient detail in the catalogue record to be able to distinguish one artefact from another seemingly identical one.
- Access to the MODES system is not be permitted to untrained users or to people from outside the museum (such as researchers) without careful one to one supervision. In the case of the latter, the Curator may prepare computer “outputs” in advance which would not disclose any sensitive information.
- MODES enables convenient access to the collection information, permitting searches using either indexes or free text.

### **3.6 Object Exit**

3.6.1 Definition - “The management and documentation of objects leaving the organisation’s premises” (SPECTRUM).

#### **3.6.2 Current procedure at The Beacon :**

- Artefacts are not permitted to leave the museum’s custody without the correct paperwork and prior authorisation by the Curator or Manager.
- The Beacon uses standard Exit Forms from the MDA. Each form has a controlled “Exit” number to avoid duplication.
- Exit Forms are used to record temporary exit of the artefacts from the museum (such as a loan out for display or for conservation), but may also be used to record a permanent exit (such as a transfer of an artefact to another Accredited Museum following a rationalisation exercise and in accordance with the Collections Development Policy and SPECTRUM procedures for Disposal).
- When completed, the Exit Form includes the contact details and signatures of the Remover and Recipient, as well as an authorisation signature on behalf of the museum. The form records accession number, object description, condition comments, insurance valuation, reason for Exit, agreed return date, and has space to record the item back into the collection on its return (if applicable).
- If using a courier, he/she signs as Remover. The form is photocopied before accompanying the artefact to its destination. When signed by the Recipient, the original form must be returned to The Beacon.
- The Exit form is in three parts. The original copy (white) is filed in the Exit Forms file in Exit number order. The yellow copy accompanies the artefact and is the receipt for the Recipient. The blue copy is filed in the Loans Out file after being used by the Curator to update location records on MODES, within 5 working days.
- If an artefact is on loan to The Beacon and needs to be loaned or transferred elsewhere (for instance for specialist identification or for conservation), this may only be done after receiving written permission from the original lender.
- It is very likely that the Exit Form will be accompanied by a Loans Out Form which goes into more detail around the loan specifics and conditions.



### **3.7 Loans In**

3.6.1 Definition - "Managing and documenting the borrowing of objects for which the organisation is responsible for a specific period of time and for a specified purpose, normally exhibition/display but including research, conservation, education or photography/publication" (SPECTRUM).

#### **3.7.2 Current procedure at The Beacon :**

- All loans of artefacts into The Beacon are recorded on an Entry Form – this includes details of ownership, reason for loan, duration of loan, signatures of both the lender and museum, and are used to specify required insurance cover.
- Completed blue Entry Forms, along with any other associated paperwork such as loan agreements and conditions, are filed in the Loans In file. White copies of the Entry Form go into the Entry Forms file in Entry Number order. The pink copy is given to the object owner as a receipt and must be presented when they come to reclaim the artefacts at the end of the loan period.
- Items on loan are displayed / stored in exactly the same way as the museum collections. Loaned artefacts are regularly inspected and condition checked by the Curator at least once a year as well as on arrival.
- Environmental monitoring reports and security information is available to lenders in advance of any loan in being agreed.
- Loan artefacts are not marked or recorded in the Accession Register.
- Loans In for short periods, for instance for identification, are kept in the Curator's Office.
- Any conservation or photographic requests relating to the loaned artefacts may only be undertaken once written permission has been received from the owner.
- The maximum term for a loan into The Beacon is 5 years after which it will be reviewed. "Permanent loans" or loans for an indefinite period are not permitted.
- The paperwork for all loans in is reviewed by the Curator at least every 6 months and contact is made with owners for any loans coming up to their expiry dates.
- Loans for temporary exhibitions (up to 3 months) are reported by the Curator annually for insurance review purposes to Copeland Borough Council's finance department. Details are recorded on Insurance Forms which accompany Exhibition Agreements and an Entry Form on arrival at the museum.
- Any Loans In at the museum when the Valuation is conducted (every 3 years), will be included in the valuer's review, again for insurance purposes.

#### **For action –**

All objects on loan to the Beacon for longer than 3 months are to be added to MODES and saved under their Entry Number.

Target deadline: 31 August 2012

### **3.8 Loans Out**

3.8.1 Definition - "Documenting and managing the loan of objects to other organisations or individuals for a specific period of time and for a specific purpose,

normally exhibition/display, but including research, conservation, photography and education” (SPECTRUM).

### **3.8.2 Current procedure at The Beacon :**

- All requests for loans are received in writing and are considered and authorised by the Curator or Manager.
- Loans are only made to other Accredited Museum or to venues which can offer the correct environmental conditions, security arrangements and public access requirements (all pre-checked by the Curator).
- Loan agreements are finalised in advance, featuring dates of loan, security arrangements and environmental requirements, and are signed before the artefact(s) leave The Beacon, further covered on the objects departure by an Exit Form.
- Evidence of insurance cover is required in advance of an artefact loan being made from The Beacon – this evidence is kept on file for the duration of the loan.
- The Beacon does not permit the loan of artefacts on “permanent loan” or for indefinite periods. Maximum loan term would be 5 years and would then be reviewed if appropriate.
- All loans out are inspected and condition checked every year by The Curator.
- Exit Form, Outgoing Loan Agreements and any other associated paperwork are filed in the Loans Out file (“current” section).

#### **For action –**

Annually, Curator to ensure that all items out on loan to other organisations are checked, cleaned and audited and the MODES records and loan files updated accordingly. Check insurance details on file are current.

Target deadline: 31 August 2013 and subsequent years.

### **3.9 Retrospective Documentation**

3.9.1 Definition - “The improvement of the standard of information about objects and collections to meet SPECTRUM Minimum Standards by the documentation of new information for existing objects and collections” (SPECTRUM).

#### **3.9.2 Current procedure at The Beacon :**

- As a result of the documentation project from 1994 to 1997, a small number of artefacts were found without accession number or provenance. These were accessioned, catalogued onto MODES and recorded as “untraced finds” (donor unknown, date pre-1994).
- As new evidence comes to light (such as old diaries found in store or sale receipts), these artefacts of unknown provenance are gradually being resolved.

#### **For action –**

Curator to contact Cumbria Archives and search the archive at Copeland Borough Council for any new sources of acquisition information. Cross reference any new information sources with MODES records to reduce number of “untraced finds” Target

deadline : March 2014

### **3.10 Inventory Check & Condition Checking**

#### **3.10.1 Current procedure at The Beacon :**

- Every three years (in advance of a Copeland Borough Council Audit of the museum collection and its documentation systems), the Curator (plus a volunteer or another member of the team) conducts a complete inventory check of the collection, based on the physical presence of the objects, on a box by box, shelf by shelf, racking bay by bay etc. basis.
- MODES is used to generate inventory sheets for each location (down to box number level) in accession number order.
- The inventory/condition check is always completed by two people and both sign and date each inventory sheet. Of these two people, one is always either the Curator or Manager (also professional Curator).
- If an alert is raised due to artefact condition, the artefact is photographed, the box/artefact wrapping is clearly marked (fluorescent pink asterisk using marker pen) to indicate a problem, the artefact may be isolated from the rest of the collection if necessary and conservation guidance is sought. This information is recorded on MODES immediately.
- Following each inventory check, MODES records are updated within 1 month (audit, location or condition information).

### **3.11 Audit**

3.11.1 Definition - "The examination of objects or object information, in order to verify their location, accuracy and relationships" (SPECTRUM).

#### **3.11.2 Current procedure at The Beacon :**

- At the request of Copeland Borough Council's Audit Department and in advance of The Beacon's redevelopment in 2006-7, the Beacon's entire collection was audited.
- Every three years, a further audit of the most valuable items in the collection is conducted by Council Audit officers to test the efficiency and accuracy of the documentation systems. The last audit was completed 2010, with 100% success. This audit was based on the November 2009 collection valuation report plus MODES.

#### **For action –**

Curator to complete inventory check

Target deadline : 31 March 2013, 31 March 2016

Copeland Borough Council Audit check of collection/documentation systems

Target deadline : 31 March 2013, 31 March 2016

### **3.12 Valuation**

3.12.1 Definition - "The management of information relating to the financial valuations

placed on individual objects, or groups of objects, normally for insurance/indemnity purposes” (SPECTRUM).

### **3.12.2 Current procedure at The Beacon :**

- Copeland Borough Council Audit department require that a valuation of the high value/high risk parts of the collection is undertaken every three years. The next valuation is due Winter 2012.
- Access to the Valuation reports and their contents is strictly controlled to the Curator and Manager only, with a security copy kept at Copeland Borough Council’s finance department for insurance purposes.
- The museum team are not permitted to give valuations to members of the public (for instance, as part of an identification).

#### **For action -**

Curator to procure and supervise Valuer to conduct collection valuation based on 2009 valuation report plus any additional at risk or new objects.

Target deadline : November 2012, November 2015

### **3.13 Digitisation Enhancements**

3.13.1 Details of The Beacon’s Fine Art, Decorative Art and Archaeology catalogues are available on line via The Beacon Website (hosted by Modes User Association). Good quality digital images of Beacon paintings from the Public Catalogue Foundation will be made available for use during Summer 2012. These images will be added to the on-line catalogue.

#### **For action -**

Curator to add Fine Art images from PCF: Target deadline 31 March 2013

3.13.2 The Beacon aims to make a further 500 item records accessible on-line every year. These will feature mainly items from the Social History collection. Users are able to search under different indexed fields and view a digital image of each item.

#### **For action -**

Curator to add 500 further objects : Target deadline 31 March 2013 and subsequent years.

Curator to link existing image files to MODES : Target deadline: 31 March 2014

### **3.14 Copeland Collection (picture loan scheme)**

#### **3.14.1 Current procedure at The Beacon :**

- Some items from the Borough Council’s Copeland Collection (picture loan scheme) are out on loan for a 1 year renewable loan period, to Council offices.
- All loaned items are to be checked annually for condition and location, and loans renewed as appropriate by the Curator or Manager.
- All documentation to be updated within 1 month of condition/location check.

**For action -**

Curator to check location and condition for all 72 Copeland Collection items annually  
Target deadline : 31 August 2012 and subsequent years.

**3.15 Risk Management Procedure**

3.15.1 Definition – “The management and documentation of information relating to potential threats to an organisation’s collections and the objects for which it is temporarily responsible. It includes the provision of information enabling preventative measures to be taken as well as documentation supporting disaster planning” (SPECTRUM).

**3.15.2 Current procedure at The Beacon :**

- Further to assessment by Crime Prevention Officers in 2002, the Beacon’s security systems were re-assessed in February 2007 by the (then) MLA’s Security Adviser. Further crime prevention visits took place in 2007 and 2012. The Beacon meets national required standards for Government Indemnity Insurance and complies with requirements for the Arts Council England Accreditation Scheme.
- The Security Adviser’s recommendations for visitor’s using The Beacon’s reference library have been implemented. The Security Adviser will be invited to revisit The Beacon in February 2013 (required every 5 years).
- The Beacon’s Disaster Plan and Emergency Manual has been reviewed and updated (Version 3 2012). It includes a priority “grab list” for emergency evacuation. The Fire Service have a copy of the Disaster Plan.
- The disaster kit includes digital cameras and documentation forms for recording incidents, artefact triage/salvage, salvage box contents lists. Following an incident, MODES records must be updated immediately.
- The Beacon team are trained in the use of the disaster kit on an annual basis.
- The MODES database is held on a laptop master and backed up every month to the Curator’s pc. In the near future this procedure will change as MODES Complete will be held on a Council server.
- MODES – in various versions - has been used by the museum for the past 18 years. The Curator is aware of technological advances and available systems, and will recommend upgrades or alternatives where required.

**For action –**

Curator to invite Security Advisor to revisit The Beacon before February 2013.  
Target deadline: 20 February 2013.

Curator to discuss transfer to MODES Complete and backup requirements  
Target deadline : 31 August 2012

**3.16 Loss and Damage**

3.16.1 Definition – “Managing and documenting an efficient response to the discovery of loss of, or damage to, object(s) whilst in the care of the organisation” (SPECTRUM).

### **3.16.2 Current procedure at The Beacon :**

- Standard Operating Procedure BCN/SOP070 Reporting Loss details the process for reporting an incident and includes team response requirements and a form for documenting the incident.
- This form along with cctv footage, team observations, witness reports, scene photographs, artefact photographs, files and records would be made available to the police immediately and insurance company as required.

## **4.0 Monitoring & Review**

The Curator will monitor progress against the targets set out in this plan on a quarterly basis. Current status will be assessed annually and priorities will be included in the Service Plans for all years covered by this policy.

This Policy will be fully reviewed and updated accordingly in March 2017.

## **5.0 Action Plan 2012 - 2017**

*See 5.1 over page*

## 5.1 Action Plan 2012 – 2017

| Aims  | Objective   | Date   | Responsible Officer(s)      | Action   | Costs (Est)    | Access improvements  | Controls                                       |
|---|---|--|-----------------------------|--|----------------|--|--|
| Provide greatest level of access<br><br>Maintain highest standards in collection care | Loans IN Records on MODES                           | Aug 2012   | Curator                     | All objects on Loan IN for longer than 3 months to be added to MODES and saved under their Entry Number.   | £500           | Easy to locate; identify any issues and risks  | Sensitive information not available to public. |
| Provide greatest level of access<br><br>Maintain highest standards in collection care | Loans OUT Condition Check                           | Aug 2013<br>; Aug 2014<br>; Aug 2015<br>; Aug 2016               | Curator                     | All Loans OUT to be checked, cleaned and audited and the MODES records and loan files updated accordingly. Check insurance details on file are current.  | £1K each year  | Preservation of artefacts on loan and display; ensuring access to collections; current information | Sensitive information not available to public. |
| Provide greatest level of access<br><br>Maintain highest standards in collection care | Loans OUT Copeland Collection (picture loan scheme) | Aug 2012<br>; Aug 2013<br>; Aug 2014<br>; Aug 2015<br>; Aug 2016 | Curator + Beacon team       | Curator to check location and condition for all 72 Copeland Collection items   | £200 each year | Easy to locate; identify any issues and risks  | Sensitive information not available to public. |
| Provide greatest level of access<br><br>Maintain highest standards in collection care | Reduce Untraced Finds                               | Mar 2014   | Curator                     | Curator to contact Cumbria Archives and search the archive at Copeland Borough Council for any new sources of acquisition information. Cross reference any new information sources with MODES records to reduce number of "untraced finds" | £500           | Improved access and current information.   | Sensitive information not available to public. |
| Provide greatest level of access<br><br>Maintain highest standards in collection care | Undertake collection inventory                      | Mar 2013<br>; Mar 2016   | Curator + volunteers + team | Curator to complete inventory check, location, repacking, MODES update   | £10K each time | Easy to locate; identify any issues and risks  | Sensitive information not available to public. |

|   |                                   |  |                             |   |                 |  |   |
|---|-----------------------------------|--|-----------------------------|---|-----------------|--|---|
| Provide greatest level of access<br><br>Maintain highest standards in collection care | Undertake collection audit        | Mar 2013 ; Mar 2016                                  | Curator + Copeland BC Audit | Undertake Audit of collection / documentation systems                     | £1K each time   | Easy to locate; identify any issues and risks  | Sensitive information not available to public.                          |
| Ensure collections fully documented and kept up to date                               | Collection valuation              | Nov 2012 ; Nov 2015                                  | Manager + Curator           | Procure, audit, receive report, advise insurance & CBC                    | £2500 each time | Audit requirement  | Access to valuation information strictly limited; secure storage        |
| Ensure collections fully documented and kept up to date                               | Enhancing records (1)             | Mar 2013   | Curator                     | Curator to add Fine Art images from PCF to website                        | £2K             | Improved access and current information.   | Website access controls?  |
| Ensure collections fully documented and kept up to date                               | Enhancing records (2)             | Mar 2013 ; Mar 2014 ; Mar 2015 ; Mar 2016 ; Mar 2017 | Curator                     | Curator to annually add 500 further objects to website and gallery screen | £1.5K each time | Reduce handling of original artefacts; improve access to images and information, both real and virtual | Trained staff and volunteers only; public access to collections via web |
| Ensure collections fully documented and kept up to date                               | Enhancing records (3)             | Mar 2014   | Curator                     | Curator to link existing image files to MODES                             | £5K             | Improved access and current information.   | Website access controls?  |
| Provide greatest level of access<br><br>Maintain highest standards in collection care | Security Advisor Visit            | Feb 2013   | Curator                     | Curator to invite Security Advisor to revisit The Beacon                  | £100            | Accreditation requirement  | Access to valuation information strictly limited; secure storage        |
| Ensure collections fully documented and kept up to date                               | Transfer system to MODES Complete | Aug 2012   | Curator                     | Curator to discuss transfer to MODES Complete and backup requirements     | £2K             | Improved access and current information.   | Trained staff and volunteers only                                       |
|   |                                   |  |                             |   |                 |  |   |



# Copeland Borough Council – The Beacon Museum



## Collections Care & Conservation Policy

2012 – 2017

Version 2:30/5/2012



*Proud of our past. Energised for our future.*

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# Collections Care & Conservation Policy

## 1.0 Statement of Purpose

### 1.1 *The Beacon's Mission*

***“To enable everyone to explore Copeland’s unique history by collecting, preserving, interpreting and displaying artefacts for inspiration, learning and enjoyment.”***

This Collection Care & Conservation Management Policy supports the Beacon’s mission by providing the best possible collection care within the available resources. In line with the national standards required of a fully Accredited Museum, adoption of its aims, and delivery of its objectives will help the Beacon and the Borough Council achieve their ambitions for the transformation and prosperity of Copeland. This will be realised through increased access to collections for both leisure and lifelong learning and reflects the Borough’s cultural and regeneration priorities. This increased access will be enabled through the care and conservation of the museum collection.

Providing for the care of the collection is a fundamental duty for the museum and this requires a combination of preventative measures - providing the best possible environment for preserving the collection - as well as remedial conservation treatments where the damage has already been done.

### 1.2 *Aims*

- To achieve the highest possible standards in collection care
- To display, handle and store the collections in suitable conditions
- To ensure the collections are fully documented and kept up-to-date
- To minimise risk, damage, or deterioration to the collections
- To preserve the collections for future generations

**Please read this document in conjunction with The Beacon’s Forward Plan 2012 – 2013 (and subsequent years), Collections Development Policy, Collections Care & Conservation Plan, The Beacon Emergency Plan 2012 and the Documentation Manual.**

## 2.0 Background : The Collections

### 2.1 Collections Development

The Beacon’s collections were developed in the mid 19<sup>th</sup> century by the Whitehaven Scientific Association; they comprise objects and specimens relating to the social and natural history of the area, items of fine and decorative art, coins, textiles, photographs and prints. The collections were later transferred to Copeland Borough Council during local government re-organisation in 1974. Development continues today through the generosity of many donors and with enthusiastic support from The Friends of the Museum and a variety of strategic funding bodies who help The Beacon to purchase items of special interest and relevance. With depth and diversity, the collections enable service users to appreciate and understand how the Borough developed from its natural geology to contemporary collecting.

## 2.2 Significance

The Beacon's collections are of local, regional and national significance as they relate directly to the natural and human history of Copeland and Cumbria. They are frequently explored by families and researchers, students, children and tourists being an essential community resource for lifelong learning, reminiscence and enjoyment.

Items of specific merit include a rich collection of marine art, locally made ceramics and an 18<sup>th</sup> century enamelled glass goblet by William Beilby. Some artefacts celebrate local innovations, artists and associations; e.g. early mining safety equipment designed in the area and locally born artists such as Robert Salmon and Matthias Read.

The museum collections provide a direct link to Copeland's past, people, their trades and how they developed, their creativity, culture and environment. They inform our present and are the source material to inspire, our collective future.

**2.3 The total collection** now numbers over 30,000 items. Please refer to the Collections Development Policy 2012 – 2017 for a detailed breakdown of the collection subject areas.

## 2.4 Local and Regional Context

The Beacon is the main museum for Copeland and is one of the major museums in Cumbria. Due to its high standards of storage it is now the preferred repository for small to medium sized archaeological excavation archives from Copeland. As such, archaeological material specifically relating to Copeland is collected by The Beacon; Senhouse Roman Museum, Maryport collects just Roman material from West Cumbria; and Tullie House Museum & Art Gallery Trust historically covers the whole of Cumbria. In the event of a large scale archaeological excavation, discussions around the housing and management of the archive would be decided in discussion with Tullie House.

In terms of social history, The Beacon's strengths lie in providing an holistic picture of Copeland, unrestricted by theme or date. Collecting therefore covers all aspects of Copeland's social history. In reference to the independent museums in the Borough, Haig Colliery Mining Museum, Whitehaven only collects mining material; Ravenglass & Eskdale Railway Museum collects narrow gauge railway items, engines and associated social history items; and Millom Folk Museum's collections relate only to Millom and its immediate surroundings.

## 3.0 Collections Care & Conservation

### 3.1 Conservation Developments 2006 - 2012

Lancashire Conservation Studios carried out an extensive condition survey in January 2005 prior to the Beacon's redevelopment in 2006-7. Over 500 items of major importance and value were surveyed along with other items required for display or identified by Beacon staff to be in a poor condition. A conservation programme costing £150K was subsequently implemented to conserve over 300 items between 2006 and 2008. Key examples include costumes and a Sedan Chair now on display for the first time.

For the past two years, The Friends of The Museum have funded the conservation of artefacts for display, specifically an engraved glass goblet and an early wooden washing machine. The Friends are committed to continuing this support for future years and items for treatment will be selected by the Curator.

A full collection inventory takes place every 3 years (2006, 2009 and is being underway for 2012). In addition to checking location and repacking, each artefact is condition checked by the Curator. Artefacts needing conservation treatment are photographed, recorded and labelled for easy identification, condition details recorded on MODES and guidance is immediately sought from an ICON (Institute of Conservation) registered conservator.

### **3.2 Improving Collection Care**

Periodic reviews are made of the collection to evaluate conditions and summarise priorities for improvement. These reviews take place as follows:

1. At the annual review of the Benchmarks in Collection Care toolkit
2. At the conclusion of the collections inventory/audit, every 3 years
3. Annual review (January) of the housekeeping regime
4. Annual revision of the Beacon's Service Plan (in discussion with the Beacon Manager) where the Curator makes recommendations for action required and resources to implement facility, storage or display improvements.

### **3.3 Available Resources**

Supplies of conservation materials for housekeeping, collection care and basic artefact cleaning are available at the Resource Centre, where workspace is also available.

Conservation Assessments are submitted by the Curator to the Manager and/or Council's Executive Committee for decision depending on the level of financial investment required. The Curator has an annual budget of £2500 to use towards further supplies and/or remedial treatments via appropriately qualified contractors.

The Friends of the Museum also provide funds to conserve an item/collection each year, usually to a maximum value of £1000. Their decision to provide funds will be made by their committee acting on guidance from the Curator. For works above these values, the museum team fundraise for further conservation or collection care projects.

Both The Beacon and Resource Centre are suitably built or adapted buildings to act as appropriate environments to ensure the long term preservation of the collections. Systems for environmental monitoring, environmental control, housekeeping, suitable storage and displays and ways to limit pollutants and contaminants are in place and effective.

### **3.4 Setting Priorities for Conservation**

Given the restricted level of conservation funds available, it is essential to set priorities for remedial conservation.

Priorities for conservation will be based on the following –

1. The artefact(s) are needed for display or research
2. The artefact(s) have been identified as requiring urgent remedial attention resulting from the collection inventory and condition check.

These may be items that are already damaged, or are at risk of damage to themselves or other parts of the collection.

The Curator has responsibility for acting on an Assessment once the decision has been made to invest in the conservation of the artefact, depending on available funds.

### **3.5 In House Expertise & Training**

Copeland's museum collections are cared for by a team of staff led by two museum professionals, the Curator and the Museum & Tourism Services Manager.

A professional Curator cares for all the collections at the Beacon and the Museum Resource Centre. Professional standards and ethics are paramount, and the Curator has appropriate experience in preventative conservation and seeks advice from other organisations detailed at 3.6, when required. The Curator is required to hold a relevant degree, at least 4 years museum experience plus the Associateship of the Museums Association (AMA) – or a clear path to achieving the AMA.

The Curator has a BA in History and a MSc in Heritage and Museum Studies, is undergoing the AMA and has 8 years museum experience.

The Museum & Tourism Services Manager has a BA in Archaeology, MA in Museum Studies, AMA, AMA+ and 23 years museum experience.

These two posts are supported by administration, maintenance and front of house staff, many of whom are trained and experienced in collection care standards and museum work.

Both the Curator and Manager are supported by Copeland Borough Council's training programme and receive professional collection care training as part of their Continuing Professional Development. Both follow the Museum Association Code of Ethics.

The Curator and Manager receive external refresher training in collection care every other year (next due March 2013). In house training is provided by the Curator every year to the whole museum team. This training focuses on appropriate artefact handling and housekeeping, with a reminder of the limits to their activities.

The Curator and Manager also support independent museums within the Borough to aim for high standards of collection care and conservation through the Museum Mentor scheme.

### **3.6 Conservation and Collections Care Advice & Services**

Neither the Curator nor Manager undertake any remedial conservation beyond basic cleaning (as trained by Lancashire Conservation Studios) as this requires the input and skills of professional conservators. When procuring conservation treatments or guidance, The Beacon will use only conservators listed on the ICON Conservation Register.

Minor repairs may be carried out by Beacon curatorial staff but only after advice has been sought from a conservator or under their supervision.

In order to ensure that the Beacon continues to develop informed policies and procedures relating to the preventative and remedial conservation of its collections the Beacon will use external sources of advice including the following :

- Collections Link website (in house check)
- National Trust Manual of Housekeeping (in house check)
- Museum Practice (in house check)
- Benchmarks in Collections Care (in house review)
- Lancashire Conservation Studios and other ICON registered conservators
- Cumbria Archive Service Conservation Unit (external advice)

### **3.7 Documenting Conservation**

Any conservation treatments are photographed and details recorded in the Beacon's collections management system (MODES) following the SPECTRUM minimum standard for 'Conservation and Collections Care'.

Object Movement tickets are used to record the relocation of artefacts for conservation purposes and details will be recorded on MODES within 5 working days.

Conservation Assessments and related documentation are retained within files MUS/08 Conservation Reports and MUS/17 Conservation General.

Environmental Monitoring data is stored in the Curators Office and includes MEACO monitoring data as well as lux levels, UV levels and pest trap records.

### **3.8 Legal Requirements**

The Beacon team (and any conservation contractors) will comply with all legal requirements relevant to Collections Care & Conservation. Including –

- Health & Safety At Work Act 1974
- Control of Substances Hazardous to Health Regulations 2001
- Data Protection Act 1998

As a "Greener Museum", The Beacon will also look to providing conservation solutions which require lower/no energy (including microclimates), are responsibly sourced and environmentally friendly.

### **3.9 Emergency Plan & Practice**

A detailed Emergency Plan to allow for prompt and effective salvage of any collections at risk is provided for The Beacon (see MUS/66), and is reviewed and updated every 2 years. Copies are controlled and restricted, provided to Manager, Curator, Operations Officer, Head of Regeneration & Community, Fire Service.

Training is received on a bi-annual basis for the Manager, Curator and Operations Officer as they are part of an Emergency Response Network for NW. In-house Emergency Plan practice days are held for the whole team every year.

### **3.10 Policy Awareness**

To achieve maximum understanding and awareness, this document has been developed by The Beacon team and the approved version will be issued to all team members.

The Curator will attend the Executive Committee and any related preliminary meetings to tackle any queries raised by elected members relating to this policy.

In addition to hard copy versions being available at The Beacon, this document will also be available in alternative formats, languages and print sizes as well as downloadable from the museum's website [www.thebeacon-whitehaven.co.uk](http://www.thebeacon-whitehaven.co.uk).

## **4.0 Policy Review**

This Collections Care & Conservation Policy requires adoption by Copeland Borough Council via Executive Committee after formal review every 5 years.

This document will be reviewed and submitted to Copeland's Executive Committee by March 2017, or sooner as required.

## **5.0 Background Papers**

Collections Care & Conservation Plan 2012 - 2017  
Collections Development Policy 2012 - 2017  
Documentation Procedural Manual 2012 edition  
Documentation Policy 2012 - 2017  
Guidelines for Transfer of Archaeological items 2006  
Emergency Plan 2012 (secure document)



# Copeland Borough Council – The Beacon Museum



## Collections Care & Conservation Plan

2012 – 2017

Version 2:29/5/2012



*Proud of our past. Energised for our future.*

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# Collections Care & Conservation Plan

## 1.0 Statement of Purpose

This Plan is to ensure that The Beacon constantly strives to improve collections care and conservation in accordance with the Collections Care & Conservation Policy.

The Plan will support The Beacon -

- To achieve the highest possible standards in collection care
- To display, handle and store the collections in suitable conditions
- To ensure the collections are fully documented and kept up-to-date
- To minimise risk, damage, or deterioration to the collections
- To preserve the collections for future generations

**Please read this document in conjunction with The Beacon's Forward Plan 2012 – 2013 (and subsequent years), Collections Development Policy, Collections Care & Conservation Policy, The Beacon Emergency Plan 2012 and the Documentation Manual.**

## 2.0 Remedial Conservation

Sometimes an artefact needs treatment beyond basic cleaning. It may have been damaged – either deliberately or accidentally – and needs specialist repair (usually as an insurance claim). Some artefacts become damaged simply through age or as a result of the materials they are made from (such as bronze disease attacking a Roman coin or an oil painting on board splitting along with the wood).

### 2.1 Collections Care Inspections & Actions

To be fully aware of the conditions and needs of all items in the collection, The Beacon team make regular assessments of the collection to identify vulnerable items or artefacts in need of conservation and take appropriate action. In order to do this :

- Beacon staff make regular visual inspections of all display items. The Duty Manager and floorwalkers carry out general visual assessments on a daily basis. Any item(s) causing concern is reported to the Duty Manager and Curator. Closer inspections are made on a monthly basis by the Curator.
- All staff receive annual training from the Curator on recognising collection care issues, assessing condition, reporting evidence of pests, housekeeping routines and object handling.
- An audit of all high priority items in the collection is a requirement of Copeland Borough Council every two years so mandatory checks of these items are made. Full collections inventory checks (including condition) are carried out every 3 years. The last completed check was in 2009 (2012 project underway).
- Items found to be in need of treatment are isolated, packaged as appropriate for their protection, clearly labelled and a condition update is added to MODES.
- The Curator prioritises items for conservation and a small annual budget is available to spend on conservation work.
- Where an item requires specialist assessment, a professional, registered (ICON) conservator is employed.

### 3.0 Preventative Conservation

It is always easier and cheaper to prevent artefacts from becoming damaged in the first place by ensuring that they are displayed, stored and handled appropriately. Consideration must be given to temperature, humidity, light and lux levels, risk of pests, display and building maintenance, cleaning schedules and housekeeping.

The Benchmarks for Collections Care toolkit was completed in 2011 and has been used to guide improvements in collections care for the next five years.

#### 3.1 Environmental Monitoring

Variable environmental conditions can be very damaging to collections. Fluctuations of temperature, humidity and light levels (lux & UV) can be highly destructive along with levels that are too high or too low.

Accurate and regular monitoring which builds a picture of environmental conditions in the museum and stores alerts curatorial staff to any problems that need to be addressed.

The Beacon follows the following procedures to ensure good environmental monitoring:

- MEACO telemetry environmental monitoring was installed in 2008 to monitor all exhibition floors and the Fine Art stores electronically using calibrated sensors. This system is serviced and calibrated every August. System alarms and problems are emailed directly to the Curator's pc. The Curator checks the MEACO records on a weekly basis.
- Dial / digital hygrometers are used to monitor specific environments such as inside display cases. Spot check readings are noted as part of daily checks and evaluated by the Curator. The digital hygrometer can be calibrated in-house.
- The Resource Centre is monitored 24 hours a day using a recording thermo hygrograph. The Curator plans to replace this with digital data loggers during 2012/13.
- A lux monitor is used to measure light levels at the time of exhibition installation. Light levels should also be measured on a monthly basis and the levels recorded and filed. The lux monitor is also used to measure light levels inside display cases at the time of dressing/cleaning or accessing a case.
- The Beacon checks UV levels twice a year.
- Completed environmental monitoring sheets are filed in the Curator's office.

#### 3.2 Environmental Controls

Environmental controls are implemented at the Beacon where necessary to prevent risk of damage to items.

i) *Environment*

The Beacon aims to maintain the following environmental conditions:

|                      | Relative humidity | Temperature (degrees C) |
|----------------------|-------------------|-------------------------|
| Fine Art Stores      | 45-50%            | 16-18                   |
| Haig Resource Centre | 45-55%            | 15-18                   |
| Beacon Museum        | 45-55%            | 16-20                   |

ii) *Light levels*

The Beacon aims to maintain the following light levels (lux)

|                                       |            |
|---------------------------------------|------------|
| Works on paper, textiles, photographs | Max 50 lux |
| Oil paintings                         | Max 200lux |

All windows in the Beacon display areas on the 2<sup>nd</sup> and 3<sup>rd</sup> floors are boarded over to prevent the ingress of natural light. Artefacts not subject to damage from light are carefully chosen for display on the 4<sup>th</sup> floor Viewing Gallery. At the Resource Centre, small windows are at roof level and face only into the large objects store. Direct sunlight does not enter this area. All vulnerable items are in the main store which has no windows.

Specific cases (e.g. archaeology) have been provided with internal drawers to hold Artsorb or similar dessicant to further control the internal environment. All cases have close fitting seals.

Specific cases (e.g. costume) have been fitted with dimmable lighting or fibreoptic lights.

### **3.3 Storage & Display**

Where possible all collections are stored in a suitable environment according to best practice (using Collections Link guidance & Benchmarks in Collections Care.) This includes Acid-free boxes of appropriate size, acid free tissue paper or other paper enclosures, map tubes or plan chests for larger 2D items, silversafe paper or melinex sleeves for photographs. Any fine art works to be framed will require conservation standard mount board and glazing. Large works of art are hung on vertical sliding racking in the environmentally controlled Fine Art Store. Boxes of photographs and drawings are also in this storage facility. All other reserve collections (archaeology, geology, social history, textiles, numismatics) are stored in acid free boxes or are on open display at the Resource Centre.

All items in the permanent displays are displayed in GSK display cases made by Britannia Storage and constructed in 2007. These meet museum industry standards for materials and manufacture.

### **3.4 Pollutants & Contaminants**

All air conditioning units in the Beacon have dust filters. No items are on open display directly underneath an air conditioning vent. There are no external doors, other than fire doors, which are kept closed at all times. Where visitors enter the main doors to the museum, there is a large mat area to capture dirt from shoes. There are no opening windows within the exhibition galleries. Flowers or animals (apart from Assistance Dogs) are prohibited in the museum along with food and drink (exceptions apply to Beacon Café, and the 4<sup>th</sup> floor and Harbour Gallery during special events).

At the Resource Centre, there is no air conditioning or opening windows. Doors remain closed other than to gain access. Seals around doors are regular checked and insect traps laid.

Most objects on display at the Beacon are housed in cases which prevent build-up of dust. An annual cleaning schedule for these case interiors has been implemented. Items on open display are largely protected from human touch by Perspex screens. These items are to be dusted regularly by trained floor walking staff or the Curator.

## 4.0 Provision of Suitable Buildings

### 4.1 The Beacon

The Beacon is a purpose-built museum constructed in 1994-95. A £2.2M redevelopment of the building and galleries in 2007 saw the addition of a new two-storey Fine Art store along with high quality display cases and fittings, environmental monitoring throughout, £150K remedial conservation works and new visitor facilities including a new activity room and restaurant.

As such, the Beacon is a modern building with no obvious construction problems that affect the collections and all new structures comply with current building regulations. The new Fine Art store was built with conservation standards in mind and features; double sealed doors, mobile picture racking, modern heating and humidification systems, environmental monitoring sensors, is fully insulated and has 24 hour security alarms.

### 4.2 Museum Resource Centre

The Museum Resource Centre at Haig Enterprise Park is inspected regularly, at least once a week, to check conditions and for potential risks, damage or deterioration. A large one storey, brick-built double-unit on an industrial estate, the Resource Centre was converted to a museum-standard storage facility in the mid 1990s.

It contains gas fire-extinguishing systems, fire detection systems, enhanced building insulation, mobile and static storage, “visible storage” display cases and is permanently alarmed when not staffed. The industrial estate has its own staff including 24 hour patrolling security officers.

### 4.3 Building Maintenance

The Beacon and the Museum Resource Centre have regular visits from Fire Safety Officers, Health & Safety Officers for Copeland Borough Council, alarm services, lift engineers and other service engineers. Every five years the Beacon is assessed by the National Security Adviser (due February 2013).

As part of Copeland Borough Council, maintenance of the property is covered by the Property Section. This includes the ongoing maintenance (programme or emergency) of building fabric, electrics, water supply and quality testing, PAT testing, and the annual servicing of emergency generator, fire/intruder alarms, cctv equipment, heating/air conditioning systems.

Weekly checks are carried out by the Operations Officer to ensure that The Beacon is well maintained and that drains and gutters, for example, do not overflow. Building check records are filed in the Main Office.

For further information see the Beacon’s Standard Operating Procedures. These documents are issued to all staff and can be found at the Beacon Reception desk.

## 5.0 Housekeeping

Following training by conservators from Lancashire Conservation Studios in 2007, a housekeeping regime was drawn up and followed since 2008 (*see Appendix A*).

Housekeeping generally consists of dry sweeping of floors, vacuuming of floors, cleaning display cases, and dry dusting large un-cased objects (such as clocks) with conservation standard

brushes. Any wet cleaning is limited to water (or specialist steam cleaning). No chemical cleaners are used in storage areas or on the interior of display cases.

The housekeeping programme includes regular checks for dust, mould & pests. It also outlines an annual cleaning programme for displays and storage areas.

Insect traps are laid in all storage areas and checked on a monthly basis. Any insects found are reported to the Curator for identification, recording and action.

Any incoming items into the museum or storage areas (including loans) are condition checked following Spectrum guidelines. (SPECTRUM procedure 'Object condition Checking and Technical Assessment'). Any items found to have infestation are isolated from the rest of the collection, sealed in plastic, clearly labelled, and advice sought from ICON registered conservators.

## **6.0 Collections Care Risks & Opportunities**

The following SWOT analysis was completed in 2011 to support the Benchmarks in Collection Care assessment.

### **6.1 Threats**

- Theft & Vandalism
  - Physical Force (e.g. ram-raiding)
  - Rising tides due to Climate Change
  - Fire
  - Flood
  - Pests
  - Pollutants/Contaminants
  - Radiation (e.g. Light & UV)
  - Incorrect, fluctuating temperature
  - Incorrect relative humidity
  - Custodial neglect

### **6.2 Strengths**

#### **6.2.1 The Beacon**

- Risks Assessments completed for all risks
- Fully Accredited Museum
- Modern, purpose-built building with good building security (ADT fire and intruder Alarm system linked to Fire Service/central monitoring system, Chubb alert)
- Benchmarks in Collection Care toolkit
- Regular inspections from Fire Officer and all Watches
- Ram-raiding bars in place
- Flood alert sensors in Fine Art Stores
- Sealock Gates (2005) effective against high tides
- MEACO - computerised environmental monitoring system
- Digital hygrometers for specific environments (e.g. display cases)
- Managerial and curatorial expertise on site
- Condition Survey of 500 items of major importance 2005
- Borough Council commitment: audits of high priority items for conservation required every two years.
- Full collections audit carried out every three years
- Dedicated annual budget for conservation (approx £2500)
- Access to conservation specialists (Lancashire Conservation Studios)
- Lux monitor to measure light levels

- Access to a UV monitor
- Dust trap matting at entrance
- Insect traps in storage and display areas
- Annual cleaning schedule
- 'Good Housekeeping' annual in house refresher training provided by Curator
- Housekeeping Regime

### **6.2.2 Resource Centre**

- Risk Assessments completed for all risks
- 24hr. environmental monitoring
- Good building security (ADT fire and intruder Alarm system linked to Fire Service/central monitoring system, Chubb alert)
- 24hr. Site patrols
- Dust trap matting at entrance
- Insect traps in storage and display areas
- Annual cleaning schedule

### **6.3 Weaknesses**

- Staff not permanently on site at the Resource Centre
- Lack of expertise in some subject areas e.g. archives, natural history specimens
- Limited funding for conservation

### **6.4 Opportunities**

- Full condition surveys for all collections when audits carried out
- More items available for display and loan
- Funding for re-investment to conserve oil paintings via appropriate grant streams (e.g. Art Purchase Fund, The Friends of the Museum, V&A (MLA) Purchase Fund, Heritage Lottery Fund)
- Recruit volunteers who may be able to cover new areas of expertise, such as Natural History collections

## **7.0 Monitoring & Review**

The Curator will monitor progress against the targets set out in this plan on a quarterly basis. Current status will be assessed annually and priorities will be included in the Service Plans for all years covered by this plan.

This Plan will be fully reviewed and updated alongside the Collections Care & Conservation Policy in March 2017.

## **8.0 Collections Care & Conservation Action Plan 2012 - 2017**

See page 9.

## **Appendices**

Appendix A Beacon & Resource Centre Housekeeping Checklist (2012)



## 8.0 Collections Care & Conservation Action Plan 2012 - 2017

| Aims  | Objectives                                      | Date  | Responsible Officer(s)                | Action  | Costs (Est)           | Access improvements  | Controls  |
|---|---|---|---------------------------------------|---|-----------------------|--|---|
| Provide greatest level of access<br><br>Minimise risk, damage or deterioration to the collections | Digitise photo/print collections                | Mar 2014  | Curator + Volunteers + In Focus Group | Digitise, store, display, interpret - by catalogue, website and online, gallery information access              | £15,000               | Reduce handling of original artefacts; improve access to images and information, both real and virtual | Trained staff and volunteers only; no direct public access  |
| Maintain highest standards in collection care   | Refresher training for Curator                  | Mar 2013;<br>March 2015   | Curator + Manager                     | Buy in conservation training specialists  | £600                  | Cleaning new artefacts or items for display  | Specialist conservators required for training   |
| Maintain highest standards in collection care   | Annual refresher training in house              | Mar 2012;<br>Mar 2013;<br>Mar 2014;<br>Mar 2015;<br>Mar 2016;<br>Mar 2017 | Curator + Beacon team                 | Training in object handling and packing, pest identification, housekeeping routines                             | £100 per session      | Preservation of artefacts on display and in store, ensuring long term access to collections            | Include all staff ; handouts as reminders; practical experience and confidence  |
| Maintain highest standards in collection care   | MEACO service visit + calibration               | Aug 2012;<br>Aug 2013;<br>Aug 2014;<br>Aug 2015;<br>Aug 2016              | Curator                               | Book MEACO system service; calibrate digital hygrometer and use to check dial hygrometers                       | £650                  | Check collection management systems  | Cross check accuracy of measuring equipment   |
| Ensure collections fully documented and kept up to date   | Collection audit – condition and location check | Mar 2013;<br>Mar 2016   | Curator + Beacon team                 | Audit locations and conditions for all items listed in Valuation Report   | £10000 each inventory | Check collection management systems, MODES, fulfil audit needs "know what you have and where it is"    | No public access to sensitive information   |
| Ensure collections fully documented and kept up to date   | Collection valuation                            | Nov 2012;<br>Nov 2015   | Manager + Curator                     | Procure, audit, receive report, advise insurance & CBC  | £2500                 | Audit requirement  | Access to valuation information strictly limited; secure storage  |
| Ensure collections fully documented and kept up to date   | Labelling & marking training                    | Nov 2012;<br>Nov 2016   | Curator                               | Provide basic training to team and Cumbrian museums   | £500                  | Effective marking to identify artefacts  | Effective identification of artefacts for internal and public access purposes   |
| Preserve collection for future generations  | Disaster planning / Salvage formal training     | Mar 2013;<br>Mar 2016   | Manager + Curator + Ops Officer       | Collection care under difficult circumstances; supports creation of new regional disaster kit and staff support | £5000                 | Effective collection care and salvage  | Management of collections and public during emergency situations; limit risk to all                                     |
| Preserve collection for future generations  | Disaster planning / Salvage IN HOUSE training   | Mar 2013;<br>Mar 2014;<br>Mar 2015;<br>Mar 2016;<br>Mar 2017              | Curator + Beacon Team                 | Collection care under difficult circumstances; staff support  | £100 per session      | Effective collection care and salvage  | Management of collections and public during emergency situations; limit risk to all                                     |
| Display, handle and store the collections in suitable conditions                                  | Formal collection Audit                         | Mar 2013;<br>Mar 2016   | Curator + Audit + Beacon team         | Audit, MODES check or update and labelling for all paintings and high value or at risk items                    | £1000                 | Easy access and identification of artefacts in store   | No public access to art stores; access to selected staff & information to find paintings quickly for research elsewhere |

## HOUSEKEEPING CHECKLIST FOR THE BEACON (B)/HAIG RESOURCE CENTRE (HRC)

|                 | JAN   | FEB                                 | MAR   |                              | APRIL                                | MAY                           | JUNE                                | JULY  | AUG | SEPT                                    | OCT                                 | NOV   | DEC  |
|-----------------|---|-------------------------------------|---|------------------------------|--------------------------------------|-------------------------------|-------------------------------------|---|-----|---|-------------------------------------|---|--|
| <b>DAILY</b>    | check for fingerprints on cases (B)               | check open displays (B)             | check no objects have fallen in display cases (B) | <b>END OF FINANCIAL YEAR</b> | check temp/RH levels (B)             |                               |                                     |   |     |   |                                     |   |  |
| <b>WEEKLY</b>   | clean glass and dust tops/base panels of case (B) |                                     | Record temp/RH at HRC                             |                              |                                      |                               |                                     |   |     |   |                                     |   |  |
| <b>MONTHLY</b>  | check insect traps (B & HRC)                      | sweep floors at HRC                 | print monthly temp/RH report from Meaco           |                              | Check silica gel levels in cases (B) |                               | sweep floors of painting store      |   |     |   |                                     |   |  |
| <b>SEASONAL</b> | Clean/dust interiors of all display cases (B)     | dust all objects on open display(B) | Lay new insect traps (B & HRC) &                  |                              | Check for wood-worm                  | Order new supplies/mat erials | Dust all objects on open display(B) | Beware flying ants outbreak from front door at HRC. |     | Lay new insct traps (if full) (B & HRC) | dust all objects on open display(B) | dust or vacuum picture frames in painting store | Full clean of store & dust all items on open display (HRC) |

\* REPLACE ACID FREE TISSUE IN STORAGE BOXES EVERY FIVE YEARS \*



## **Beacon, Arts & Tourism Services**

### **Forward Plan 2012-2013**

*VERSION: 4 (30/5/2012)*

[www.Copeland.gov.uk](http://www.Copeland.gov.uk)

| <b>Current Document Status</b>           |   |  |   |                                      |
|--|---|--|---|--------------------------------------|
| <b>Version</b>                           | 3   | <b>Head of Service authorisation</b>           | <b>Date of authorisation</b>                |                                      |
| Date                                     | 30/5/2012   | Julie Betteridge                               | <Insert date>                               |                                      |
| <b>Responsible officer</b>               | <b>Sue Palmer<br/>Beacon, Arts &amp; Tourism<br/>Services Manager</b> | <b>Review date</b>                             | <b>Insert date review must be completed</b> |                                      |
| <b>Location</b>                          | S(Beacon):Business Plan_Service Plan 2012 2013                        |  |   |                                      |
| VERSION HISTORY                          |   |  |   |                                      |
| <b>Date</b>                              | <b>Version</b>  | <b>Author/Editor</b>                           | <b>Comments</b>                             |                                      |
| 9/3/2012                                 | 1   | Sue Palmer                                     | Amends included                             |                                      |
| 30/5/2012                                | 3   | Sue Palmer                                     | Adapted to Forward Plan version             |                                      |
| <b>Equality Impact Assessment Record</b> |   |  |   |                                      |
| <b>Date</b>                              | <b>Type of assessment conducted</b>                                   | <b>Summary of actions taken decisions made</b> | <b>Completed by</b>                         | <b>Impact Assessment review date</b> |
| 17/3/2012                                | Initial   | Not aware of an adverse impact                 | Sue Palmer                                  | <Insert date>                        |
| <b>Review date</b>                       | <Insert date review must be completed>                                |  |   |                                      |

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## 1. Beacon Forward Plan 2012/13

This Plan provides detailed information and guidance for Copeland Borough Council Officers and Members, Beacon staff, volunteers, stakeholders and potential funders.

This Forward Plan has been developed for Accreditation purposes from the Copeland Borough Council Executive Committee approved Beacon & Tourism Service Plan 2012/13.

**Please read this document in conjunction with the Beacon & Tourism Service Plan 2012-13, Collections Development Policy, Collections Care & Conservation Policy, Collections Care & Conservation Plan, Documentation Policy, Documentation Manual, Learning & Access Policy, Exhibitions & Events Policy, Emergency and Business Continuity Plans.**

It has been 5 years since a £2.2M redevelopment and The Beacon has achieved all its required targets in spite of the economic downturn. The financial year 2011/12 saw visitor and income figures at their highest in the Beacon's 16 year history. With the expiry of the 5 year funder-approved Business Plan in March 2012, and an external Service Review conducted in December 2011, Copeland is preparing a new Business Plan (due October 2012) giving a clear sense of direction of where it's priorities lie in terms of achieving Council and business objectives and a positive, new outlook for the future.

Core museum aims continue to be collection care, improving educational achievement, attracting new audiences, increasing visitor spend and enhancing public profile. An exciting exhibitions programme, interactive exhibits and greater access to Copeland's collections through regular gallery changes ensure the museum stays up-to-date and constantly evolves.

With award winning visitor and learning facilities the Beacon provides both a rich community resource and unique tourist attraction. The Beacon is helping to transform the fortunes and perceptions of the area and is playing a pivotal role in Copeland's regeneration and prosperity.

## 2. Planning Context and Service Description

**Copeland Borough Council's vision is:**

***“Working to improve lives, communities and the prosperity of Copeland”***

The Beacon will support this vision through its mission:

***“To enable everyone to explore Copeland's rich and diverse history by collecting, preserving, interpreting and displaying artefacts for inspiration, learning and enjoyment.”***

### **Purpose of the service**

Beacon & Tourism Services sits within the Regeneration & Community Section of the People & Places Directorate. The purpose of the service is the -

- Safe building operation of The Beacon, Copeland TIC Whitehaven, Museum Resource Centre and Moresby Store Management and care of Copeland's museum collection and provision of curatorial advisors to independent museums within the Borough
- Venue and provider of services for lifelong learning, visual arts, events, activities and cultural enrichment
- Income generation through admissions, room hire, reference library, research facilities, retail outlet, café, tourism services
- Promotion of Copeland as a visitor destination via Copeland TIC Whitehaven

Copeland's Partnership Plan – the Sustainable Communities Strategy – sets a 10 year shared vision for maintaining and building sustainable communities throughout Copeland. The Strategy feeds into Copeland's annual Improvement Plan which in turn guides the development of The Beacon & Tourism Service Plan.

### **3. Aims**

#### **At the Beacon we will :**

- Secure, preserve, document, interpret and develop the museum collections.
- Tell the story of Copeland, its people, origins, trades and landscape.
- Develop, sustain and increase a diverse range of audiences.
- Enhance The Beacon's local, regional and national profile.

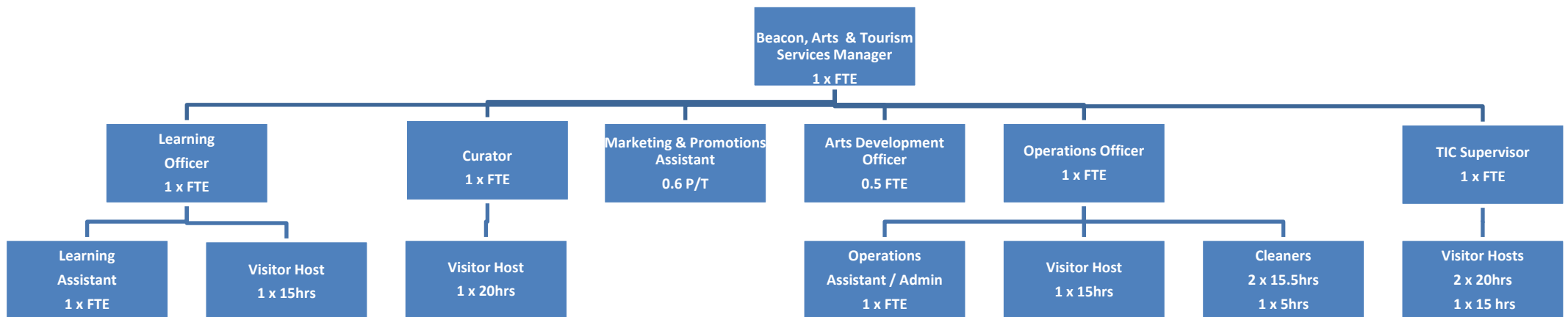
#### **We will achieve our aims by:**

- By promoting and facilitating access to collections and information to all potential users.
- By applying controlled collections management and effective collections care.
- Regularly refreshing permanent displays by changing 6 showcases per year and using the Sinking Fund to change an entire story zone each year.
- By hosting/curating up to 6 temporary exhibitions and 3 key special events per year.
- By reviewing and enhancing lifelong learning provision and facilities.
- By marketing the Beacon as a unique attraction within its harbour-side setting.
- By applying for relevant awards and by maintaining existing and achieving new quality standards.
- By expanding access opportunities and targeting new audiences from under-represented groups.
- By developing staff skills and potential through relevant training.
- By responding to customer feedback and the latest statutory guidance or sectoral best practice guidelines.
- By developing partnerships and linking to other museums, libraries and archives via local, regional and national networks (e.g. Cumbria Coast Learning Network, North West Museum Federation)
- By accessing resources and maximising income.



## 4. Resources

- Beacon & Tourism Service Staff Structure



For budget information for 2012/13, please see **Appendix 1** Beacon & Tourism Services Budget Book Extract, Copeland Borough Council, 2012/13.

## 5. Customer Profile of the service

Our customers are:

- Internal - Colleagues and members within Copeland Borough Council, especially within Regeneration & Community Section
- External –
  - Copeland residents
    - Adults
    - Children
    - Shop users
    - Café users
    - Workshops / activities
  - Cumbria residents
  - Domestic holiday makers in commercial accommodation – especially those making a day trip from a holiday base elsewhere (i.e. Lake District National Park)
    - Sub groups – coach tour operators
    - Cruise ship passengers
    - Age and types of visitors (e.g. SKI brogues or terraced families)
    - “Off the beaten track” type walkers
    - Marina users / sailors
  - Visitors staying with friends and relatives within a twenty-five mile catchment area
  - People coming back after moving away
  - Repeat visitors
  - Visitors from abroad with historical interest
  - Domestic short breakers
    - C2C riders, Coast to Coast
  - Schools
  - Other education / special interest / affinity groups (these cross-over in the products they use)
  - History interest, researchers
  - Businesses, religious groups, public service organisations (especially corporate hire, room hire, photographic collection use)

## The postcode analysis for visitors to The Beacon is as follows –

|                           | <b>Copeland</b> | <b>Other Cumbria</b> | <b>Other UK</b> | <b>Overseas</b> |
|---------------------------|-----------------|----------------------|-----------------|-----------------|
| <b>2007/08</b>            | 58              | 20                   | 16              | 6               |
| <b>2008/09</b>            | 19              | 15                   | 58              | 8               |
| <b>2009/10</b>            | 37              | 20                   | 38              | 5               |
| <b>2010/11</b>            | 50              | 17                   | 28              | 5               |
| <b>2011/12 projection</b> | 24              | 25                   | 46              | 5               |

## Customer Consultation

Thousands of feedback messages have been received during 2011/12 using comments via email and letters, visitor comments books, exhibition comments, Standpoint touchscreen, Copeland Disability Forum focus group and the “Message in a Bottle” interactive. Comments for action in this and future years include :

- Requests for improved lighting in certain areas, “too atmospheric”.
- Ideas for future summer blockbuster exhibitions.
- Suggestions for temporary exhibitions.

## 6. 2011/12 Service Plan Performance Summary

| <b>Objective / Key Project</b>   | <b>2011/12 Results</b>  |
|--|---|
| Attract 54640 visitors to The Beacon.  | 82614 visitors for 2011/12. This year The Beacon's visitors will have contributed approx £2.4M spend in the local community.  |
| Offer opportunities for lifelong learning, including direct teaching to nurseries, school pupils (target 4650), clubs, and adult groups or individuals (target 1100).    | During 2011/12, The Beacon will have taught 4835 school pupils. Learning opportunities were provided to at least 1725 adults. 4 new activity sessions or talks were created.  |
| Create a new Beacon gallery using Sinking Fund finances.   | The "New Horizons" Medieval Gallery opened to the public during February half term, on time and under budget. The gallery has been funded from The Beacon's sinking fund and the layout and designs were tested by Copeland Disability Forum. The gallery attracted over 2700 visitors during February half term alone.   |
| Work with Localities Officers to target learning services and health messages to areas of most need through activity sessions.   | Learning services have been delivered to targeted areas of deprivation during 2011/12.  |
| Provide a venue to engage local community groups, individuals and volunteers.  | Exceeded target of 415 room bookings at The Beacon (425 actual). Team worked with 6 volunteers / work placements.   |
| Provide access for all to services and facilities. Also providing opportunities for free access to museum services, especially for children and value admission tickets. | 847 VIP annual Beacon tickets were sold during 2011/12. Excluding the Dinosaur exhibition and school pupils, at least 5050 accompanied children under 15 have been admitted to The Beacon free.   |
| Provide a varied temporary exhibitions programme to encourage repeat visits to The Beacon and Borough.   | The Harbour Gallery featured 8 exhibitions during 2011/12 including the colossal BBC Walking with Dinosaurs exhibition which attracted an additional 13000 visitors to The Beacon compared to last year. Thanks to grant funding, artefacts were loaned from the Victoria & Albert Museum London for the "Oliver Messel" exhibition. The 2 <sup>nd</sup> floor Beacon Gallery displayed 3 exhibitions featuring artworks from the stored museum collection. |
| Support minimum 3 independent museums in Copeland.   | Curatorial Advisor support has been provided to Haig Colliery Mining Museum, Ravenglass & Eskdale Railway Museum and Millom Folk Museum.  |
| Deliver Arts Development projects to attract new audiences and increase participation in the arts.   | Projects this year have included the continuation of Pathways to Art and the West Cumbria Arts Engagement Project as well as supporting local arts venues through grants and the Joint Venues Group. Festivals including Lakes Alive and the Whitehaven Festival have been supported by this team.  |
| Support the tourism infrastructure across the Borough.   | 58183 visitors and residents have used Copeland's Tourist Information Centre at Whitehaven during this year. Tourist Info Point boards were installed at locations around the Borough by Easter 2011. Local communities are being encouraged to take on these boards for themselves for future updating.  |

## 7. Service Objectives

| No | Routine Tasks  | Description of Performance Indicator and/or milestone to be used to demonstrate performance in this area   | Links to Council Plan Theme | Link to objectives in Council Plan   | Responsible Officer                                    |
|----|--|--|-----------------------------|--|--|
| 1  | Provide a minimum programme of 6 temporary exhibitions at The Beacon by March 2013                                     | Exhibition Programming - establish programme for 2013 in September 2012; issue leaflet detailing programme December 2012   | PROSPERITY                  | 2.3 Establish a vibrant, diverse and sustainable local economy                           | Museum Curator   |
| 2  | Safely operate, staff and maintain service and facilities at 4 sites – The Beacon, TIC, Resource Centre, Moresby Store | Forced closure of Beacon or TIC to be limited to maximum 4 days per year   | PROSPERITY                  | 2.3 Establish a vibrant, diverse and sustainable local economy                           | Beacon & Tourism Services Manager + Operations Officer |
| 3  | Collection Management  | Activities as described in Collections Development Policy, Care & Conservation Policy and Plan, Documentation Policy   | PERFORMANCE                 | 4.1 Provide high performing services that are accessible and respond to customers' needs | Curator  |
| 4  | Collection Valuation   | Procure Valuer by end September 2012; update 2009 valuation list with additional artefact inspections as required by Museum Curator by end of November 2012; advise Finance of results and update MODES by end December 2012 | PERFORMANCE                 | 4.1 Provide high performing services that are accessible and respond to customers' needs | Beacon & Tourism Services Manager + Curator            |
| 5  | Collection Audit   | Complete social history, fine art and decorative arts (location and condition checks plus repackaging/display) by end of March 2013; Copeland Audit officer to test documentation systems                                    | PERFORMANCE                 | 4.1 Provide high performing services that are accessible and respond to customers' needs | Curator  |

## 8. Key Projects

Activities which are above daily operation. These might be improvement activities; corporate projects or new schemes and activities

| No | Key Projects (please provide a title and short description)                   | Description of Performance Indicator and/or milestone to be used to demonstrate performance in this area  | Links to Council Plan theme | Link to objectives in the Council Plan   | Responsible Officer               |
|----|---|---|-----------------------------|--|-----------------------------------|
| 1  | Educate 4800 children through curriculum linked activities                    | Pupil figures (formerly BV170C); Review existing learning service by April 2012; refresh minimum 3 activity sessions and minimum 4 loan artefact packs by March 2013  | PEOPLE                      | 1.4 Provide people with opportunities to build aspirations and to support their personal development | Learning Officer                  |
| 2  | Meet new quality standards for museum collection care including Accreditation | Museum Accreditation – finalise policy documents and pass through Exec by end June 2012; submit Accreditation application by end July 2012  | PERFORMANCE                 | 4.1 Provide high performing services that are accessible and respond to customers' needs             | Beacon & Tourism Services Manager |
| 3  | New Beacon Gallery to be created using sinking funds by February 2013         | New Gallery - open to public on time and within budget; Exec approval to access Sinking Fund by August 2012; procure exhibition suppliers by December 2012; dismantle current display and create new Gallery Jan-Feb 2013; open to public February 2013 half term | PROSPERITY                  | 2.3 Establish a vibrant, diverse and sustainable local economy                                       | Beacon & Tourism Services Manager |
| 4  | Service Review Recommendations  | Service Review Requirements from CLT – investigate and/or implement; Details once received  | PERFORMANCE                 | 4.1 Provide high performing services that are accessible and respond to customers' needs             | Beacon & Tourism Services Manager |
| 5  | New 5 Year Business Plans for Beacon and Tourist Information Centre           | Business Plan 2011 approval delayed due to Service Review; 2 new plans to be approved by October 2012   | PERFORMANCE                 | 4.1 Provide high performing services that are accessible and respond to customers' needs             | Beacon & Tourism Services Manager |

## 9. Performance Indicators

| PI no  | Description of Performance Indicator and/or milestone to be used                                       |   |  | How often can the PI be reported? | Source  |
|--------|--|---|--|-----------------------------------|---|
|        |  | Target 12/13  | Basis for target                                     |                                   |   |
| BEA1   | Beacon Visitors  | 69,000 visitors                                       | Beacon Business Plan                                 | Monthly                           | Haven Computer system via Beacon Arts & Tourism Services Manager                  |
| BEA2   | TIC Users  | 60,000 users  | Previous year figures; Cumbria Tourism plan          | Monthly                           | Cumbria Tourism monthly statistics via TIC Supervisor                             |
| BV170a | Visits to and use of Museums & Galleries per 1000 population   | 1303.41<br>(69000 + 22630 usage from 2010/11 = 91630) | 2010/11 results and Beacon Business Plan             | Monthly                           | Monthly visitor figure table  |
| BV170b | Visits in person to Museums & Galleries per 1000 population  | 981.51  | 2010/11 results and Beacon Business Plan             | Monthly                           | Monthly visitor figures with added usage by web, video conferencing and enquiries |
| BV170C | Pupil Figures -<br>'We will provide 4800 places for children on the Beacon Education programme' CIP PI | 4800 pupils   | Beacon Business Plan; improvement on current figures | Monthly                           | Haven Computer system via Beacon Arts & Tourism Services Manager                  |

## 10. Operational Risks

In this section the service should identify any risks to the achievement of the objectives or actions. These risks should be reviewed quarterly and updated on covalent.

| Id | Description  | Impact score | Likelihood score | Target Impact score | Target Likelihood Score | Effect if risk occurs  | Controls in place to deal with risk  | Is risk controlled? | Owner                  |
|----|--|--------------|------------------|---------------------|-------------------------|--|--|---------------------|------------------------|
| 1  | Beacon / TIC service disruption due to insufficient staffing due to redundancies, illness or emergencies | 3            | 2                | 1                   | 2                       | Beacon and/or Tourist Information Centre closures  | Emergency plan and procedures, staff contact details; officers covering front of house on daily basis          | N                   | Sue Palmer             |
| 2  | Unable to deliver key projects or routine duties as officers covering front of house duties              | 2            | 3                | 1                   | 2                       | Projects not delivered – front of house is priority; may affect audit requirements                                 | Flexible team but being pushed to far; review of Duty Manager role; back office able to work at Reception desk | Y                   | Sue Palmer             |
| 3  | Reduced Curatorial Advisor guidance/support for independent museums in Copeland                          | 3            | 3                | 2                   | 2                       | Loss of Accredited Status (and funding) for those independent museums if another Curatorial Advisor can't be found | Manager can support Curator in covering this role where time allows  | N                   | Sue Palmer / Ben White |
| 4  | Loss of service or parts of service following Service Review results                                     |              |                  |                     |                         | Extent of changes as yet unknown   |  | N                   | Julie Betteridge/ CLT  |

### Scoring the Risk

| Impact |        | Likelihood |          |
|--------|--------|------------|----------|
| 1      | Low    | 1          | Unlikely |
| 2      | Medium | 2          | Possible |
| 3      | High   | 3          | Likely   |



## **11. Monitoring & Review**

This plan, its objectives and actions will be monitored by the Beacon & Tourism Services Manager on a monthly basis with data uploaded to the Covalent Performance management System.

The plan will be reviewed Autumn 2012 as part of the Council's Service Planning and Budget Setting process.

## **12. Equality Impact Assessment**

Equality Impact Assessment starts on page 19.

## **13. Appendices**

Appendix 1 The Beacon Budget Book 2012 2013, Copeland Borough Council

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## Copeland Borough Council Initial Equality Impact Assessment-Valid from 1 November 2011

|   |   |  |                  |  |  |
|---|---|--|------------------|--|--|
| <b>Directorate/Service Area</b>   | <b>Beacon Arts &amp; Tourism Services</b> | <b>Persons undertaking the assessment</b>  |                  | <b>Sue Palmer - Beacon Arts &amp; Tourism Services Manager</b> |  |
|   |   | <b>Person responsible for implementation of the policy/ function/ service or proposal</b>              |                  |  |  |
| <b>Name of policy/ function/ service or proposal to be assessed</b>   | <b>Service Plan</b>                       | <b>Date of assessment</b>  | <b>17/3/2012</b> | <b>New or Change to existing circumstances</b>                 |  |
| <p><b>Positive Equality Duties</b></p> <p>This initial EIA will also help you identify whether there are opportunities for promoting equality. Even if there are no adverse impacts, this part of the process is essential as it will ensure we meet our equality duties. These equality duties are set out in a number of pieces of <a href="#">legislation</a> and are summarised below for reference:</p> <p>If you require any assistance with the completion of this form please contact the Equalities Officer:<br/>Alison Walton (59 8358) Email: <a href="mailto:awalton@copeland.gov.uk">awalton@copeland.gov.uk</a></p> |   |  |                  |  |  |
| <p><b>1. Briefly describe the aims, objective or purpose of the policy/service/ function or proposal being assessed. If this EIA is assessing the impact of a proposed change please describe the proposed change.</b></p>  |   | <p><b>Service Plan will set routine tasks, key projects and Performance indicators for 2012/13</b></p> |                  |  |  |

|  |  |
|--|--|
| <p><b>2. What are the required outcomes from this policy/service/function or proposal?</b></p>   | <p><b>An achievable programme of activities to deliver or support Copeland’s objectives.</b></p>   |
| <p><b>3. Who will be affected by this policy/service/function or proposal?</b></p>   | <p><b>As frontline services, the Service Plan delivery may affect all residents and visitors to Copeland. As lifelong learning is a core function of The Beacon Museum, the Plan may affect users of any age.</b></p>                |
| <p><b>4. How do these outcomes align with the Councils priorities? (Council Plan)</b></p>  | <p><b>Supports Council Improvement Plan, especially 2.3 Establish a vibrant, diverse and sustainable local economy and 1.4 Provide people with opportunities to build aspirations and to support their personal development.</b></p> |
| <p><b>5. Are there any wider impacts associated with the policy/service/function or proposal that should be considered, e.g. the proposed impact on the effectiveness of other service areas of the Council or any assistance to implement that would be required.</b></p> | <p><b>Reduced capacity in Arts Development will result in reduced activity in this area for people within the Borough.</b></p>   |
| <p><b>6. What factors/risks could affect the intended outcome.</b></p>   | <p><b>Service Review results are not yet known and so there will be further changes to the services provided in order to meet CBC savings requirements.</b></p>  |

|   |   |
|---|---|
| <p>7. Who are the main stakeholders in relation to this policy/service/function or proposal (e.g. partners, community groups etc.)?</p>   | <p>All residents and visitors to Copeland. School groups are an especially important service user.</p>  |
| <p>8. What quantitative data have you used for this assessment (Statistics, demographics, indicators, and partner data)? Please note that data should relate to each equality group (race, disability, etc.).</p> <p>All evidence to be kept and recorded</p> | <p>Targets have been set based on the results from previous years (for The Beacon going back to 1996) and any regional or national trends. Data is collected each year on who the service users are. Quarterly exit surveys are conducted to guide improvements or projects for future years.</p> |
| <p>9. What qualitative data have you used for this assessment (Consultation, complaints and comments)? Please note that data should relate to each equality group (race, disability, etc.).</p> <p>All evidence to be kept and recorded</p>                   | <p>Focus groups for new gallery including Copeland Disability Forum. Comments and compliments via Visitors Book, Exhibition Comments, "Message in a Bottle", Standpoint computer interactive.</p>   |
| <p><b>Conclusion</b><br/>Are there concerns that the policy/procedure/function or proposal could have specific negative impact on people from the following groups?</p>   |   |

| Group                               | Will the implementation of this policy/procedure/function or proposal have any <b>negative</b> impact on people from any of these equality groups? |          | If yes, can the policy/procedure/function or proposal be amended or altered to help <b>mitigate the negative impact?</b> |   | If yes, have you considered any <b>alternative courses of action?</b><br>Within the initial EIA, this should relate to immediate alternatives. |   |
|-------------------------------------|--|----------|--|---|--|---|
|                                     | Y  | N        | Y  | N | Y  | N |
| Gender                              |  | <b>X</b> |  |   |  |   |
| Gender reassignment                 |  | <b>X</b> |  |   |  |   |
| Age                                 |  | <b>X</b> |  |   |  |   |
| Disability                          |  | <b>X</b> |  |   |  |   |
| Sexual Orientation                  |  | <b>X</b> |  |   |  |   |
| Religion or Belief (inc non-belief) |  | <b>X</b> |  |   |  |   |
| Race                                |  | <b>X</b> |  |   |  |   |
| Pregnancy and maternity             |  | <b>X</b> |  |   |  |   |
| Marriage and civil partnership      |  | <b>X</b> |  |   |  |   |

|  |  |
|--|--|
| <p><b>If you have recorded a possible alternative course of action, please provide a short description. If you have indicated a mitigating action, please provide a short description.</b></p> |  |
|--|--|

**Conclusion**

**Could the implementation of this policy/service/function or proposal disproportionately affect any particular neighbourhoods i.e. Localities/Parishes?**

|   |                  |
|---|------------------|
| <p>If yes, please describe.</p> <p>Indicate what alternatives have been considered or mitigating actions are planned.</p> | <p><b>No</b></p> |
|---|------------------|

**Will the implementation of this policy/procedure/ function or proposal have any positive impact on people from any of these equality groups?**

| Gender                              | Yes | No | Please describe   |
|-------------------------------------|-----|----|---|
| Gender reassignment                 |     |    | <b>Not specifically – intended improved service for all users</b> |
| Age                                 |     |    |   |
| Disability                          |     |    |   |
| Sexual orientation                  |     |    |   |
| Religion or Belief (inc non-belief) |     |    |   |
| Race                                |     |    |   |
| Pregnancy and maternity             |     |    |   |
| Marriage and civil partnership      |     |    |   |



|  |                          |  |  |
|--|--------------------------|--|--|
| <p><b>Are you satisfied the implementation of this policy/service/function or proposal could not be challenged for unlawful discrimination or failure to meet statutory equality duties.</b></p> |                          |  |  |
| <p><b>Should the policy etc. proceed to a full impact assessment? (if at this stage of the process there is evidence of adverse impact on any equality groups then you must answer yes).</b></p> |                          |  |  |
|  |                          |  |  |
| <p><b>Completing Officer (Name)</b></p>  | <p><b>Sue Palmer</b></p> |  |  |
| <p><b>Completing Officer (Signature)</b></p>   |                          |  |  |
| <p><b>Authorising Manager (Name)</b></p>   |                          |  |  |
| <p><b>Authorising Manager (Signature)</b></p>  |                          |  |  |



|                            | Budget 2011/2012                     | Current Approved<br>Budget 2012/13 |         |
|----------------------------|--------------------------------------|------------------------------------|---------|
|                            | £                                    | £                                  |         |
| <b>Revenue</b>             |                                      |                                    |         |
| Regeneration and Community |                                      |                                    |         |
| Arts, Beacon & Tourism     |                                      |                                    |         |
| 32201                      | Beacon                               |                                    |         |
| <u>Controllable Cost</u>   |                                      |                                    |         |
| Expenditure                |                                      |                                    |         |
| Employee Expenses          |                                      |                                    |         |
| 0001                       | Salaries                             | 200,449                            | 206,420 |
| 0005                       | National Insurance                   | 16,379                             | 14,710  |
| 0006                       | Superannuation                       | 38,844                             | 37,359  |
|                            |                                      | =====                              | =====   |
|                            | Total For Employee Expenses          | 255,672                            | 258,489 |
| Premises Related Expenses  |                                      |                                    |         |
| 0153                       | Future Funding Developments          | 0                                  | 75,948  |
| 0302                       | Electricity                          | 21,817                             | 22,908  |
| 0306                       | Other Energy Costs                   | 715                                | 715     |
| 0351                       | Ground Rents & Wayleaves             | 18,998                             | 18,998  |
| 0360                       | Rates                                | 52,094                             | 75,946  |
| 0370                       | Water Charges (Metered)              | 2,504                              | 2,504   |
| 0420                       | Contract Cleaning                    | 2,585                              | 2,585   |
| 0424                       | Refuse Collection Charges            | 206                                | 206     |
|                            |                                      | =====                              | =====   |
|                            | Total For Premises Related Expenses  | 98,919                             | 199,810 |
| Transport Related Expenses |                                      |                                    |         |
| 0580                       | Hire of Transport                    | 428                                | 428     |
| 0610                       | Car Allowances - Employees           | 1,000                              | 840     |
|                            |                                      | =====                              | =====   |
|                            | Total For Transport Related Expenses | 1,428                              | 1,268   |
| Supplies & Services        |                                      |                                    |         |
| 0706                       | Equipment for Resale                 | 20,200                             | 20,200  |
| 0707                       | First Aid Equipment                  | 50                                 | 50      |
| 0709                       | Photographic Equipment               | 50                                 | 50      |
| 0710                       | Operational Equipment                | 486                                | 486     |
| 0711                       | Furniture                            | 486                                | 486     |
| 0714                       | Exhibit Mtce. / Conservation         | 2,136                              | 2,136   |
| 0750                       | Catering Provisions                  | 389                                | 389     |
| 0771                       | Uniforms                             | 925                                | 925     |
| 0780                       | Central Printing                     | 1,636                              | 5,451   |
| 0781                       | Other Printing                       | 1,260                              | 1,260   |
| 0782                       | Books & Publications                 | 100                                | 100     |

|   | Budget 2011/2012 | Current Approved<br>Budget 2012/13 |
|---|------------------|------------------------------------|
|   | £                | £                                  |
| 0783 Stationery                             | 649              | 649                                |
| 0787 Education                              | 11,027           | 11,027                             |
| 0802 Security Services                      | 769              | 769                                |
| 0804 Bank Charges                           | 486              | 486                                |
| 0812 Training                               | 291              | 291                                |
| 0850 Postages                               | 1,000            | 1,000                              |
| 0851 Telephones                             | 10,260           | 10,260                             |
| 0901 Subscriptions                          | 705              | 705                                |
| 0945 Projects & Activities                  | 8,796            | 8,796                              |
| 0947 Hospitality                            | 240              | 240                                |
| 0962 Promotions                             | 33,974           | 33,974                             |
| 0991 Exhibit Purchase Fund                  | 960              | 960                                |
|   | =====            | =====                              |
| Total For Supplies & Services               | 96,875           | 100,690                            |
|   | =====            | =====                              |
| Total For Expenditure                       | 452,894          | 560,257                            |
| <br>Income                                  |                  |                                    |
| Income                                      |                  |                                    |
| 2026 Other Income                           | (534)            | (8,050)                            |
| 2100 Sales                                  | (19,192)         | (19,192)                           |
| 2101 Fees & Charges                         | (7,516)          | 0                                  |
| 2136 Room Hire                              | (3,500)          | (3,500)                            |
| 2145 Admissions                             | (46,698)         | (47,220)                           |
| 2149 Beacon User Group Membership           | (2,500)          | (2,500)                            |
| 2150 Beacon Business Income                 | (2,060)          | (2,060)                            |
|   | =====            | =====                              |
| Total For Income                            | (82,000)         | (82,522)                           |
|   | =====            | =====                              |
| Total For Income                            | (82,000)         | (82,522)                           |
|   | =====            | =====                              |
| Total For Controllable Cost                 | 370,894          | 477,735                            |
| <br><u>Non-Controllable Cost</u>            |                  |                                    |
| Expenditure                                 |                  |                                    |
| Support Services                            |                  |                                    |
| 0491 Public Buildings Fund                  | 41,726           | 43,934                             |
| 0940 Miscellaneous Insurances               | 9,993            | 10,379                             |
| 1258 Corporate Health & Safety SLA          | 3,380            | 3,471                              |
| 1259 Procurement SLA                        | 750              | 820                                |
| 1261 Human Resources SLA's                  | 17,377           | 19,279                             |
| 1267 Legal Services SLA's                   | 1,027            | 730                                |
| 1268 Management Information Systems SLA's   | 5,419            | 5,094                              |
| 1276 Accountancy SLA's                      | 13,081           | 13,605                             |
| 1289 Head of Regeneration & Communities SLA | 11,814           | 12,246                             |

|                                 | Budget 2011/2012 | Current Approved<br>Budget 2012/13 |
|---------------------------------|------------------|------------------------------------|
|                                 | £                | £                                  |
| 1299 Audit SLA's                | 993              | 985                                |
| 1300 Training SLA's             | 4,787            | 3,805                              |
| 1303 Payroll SLA                | 2,548            | 3,257                              |
| 1316 Communications SLA         | 1,765            | 1,948                              |
|                                 | =====            | =====                              |
| Total For Support Services      | 114,662          | 119,555                            |
| <br>Capital Charges             |                  |                                    |
| 1406 Depreciation               | 0                | 202,009                            |
|                                 | =====            | =====                              |
| Total For Capital Charges       | 0                | 202,009                            |
|                                 | =====            | =====                              |
| Total For Expenditure           | 114,662          | 321,564                            |
|                                 | =====            | =====                              |
| Total For Non-Controllable Cost | 114,662          | 321,564                            |
|                                 | =====            | =====                              |
| Total For Beacon                | 485,556          | 799,299                            |