NSCG Newsletter

seum tries to identify hazards before an object is accepted for acquisition or loan, asking the owner or lender to remove the problematic component. In addition to looking for hazardous materials, we use a Geiger counter to identify objects that may have radioactive components, and check for insect pests on arrival.

Providing access to collections that are not normally on public display has considerable resource implications. It is not just opening the doors to the stores and letting everyone in. There is still a need for interpretation; security and the human factor to ensure the visitors get the most out of the experience. Access should be seen as an opportunity to show the public other aspects of the work of museums in the preservation of the heritage.

The WWW

Re:source

The Council for Museums, Archives and Libraries is a new UK strategic organisation replacing MGC.

http://www.resource.gov.uk/

Journal Abbreviations and Full Titles (BIOSIS Format)
For those of us involved with cataloguing collections, this WWW is very helpful, with a searchable database of abbreviations of journal titles.

http://csssrvr.entnem.ufl.edu/~pmc/journals/j_titles.htm

The "Deutsches Entomologisches Institut" Bibiography of World Entomologists
A useful list of obituaries of entomologists

http://www.dei-eberswalde.de/

Best Value

A One Day Seminar
The Potteries Museum and Art Gallery, Stoke on Trent
28th September 2000

Best Value for Collections Care

Jo Sage, Technical and Specialist Services Officer, McManus Galleries, Albert Square, Dundee, DD1 4DY

Introduction

In 1996, Dundee's Art Galleries and Museums joined with a range of arts-based services to form the Arts and Heritage Department. This process brought together an assortment of 10 technical staff to form Technical and Specialist Services, a distinct group providing support services across the Department.

During 1998/99, the Technical and Specialist Services team (TASS) underwent a Best Value Review, which sought to determine the most cost-effective *way* of delivering technical services for the ensuing five years.

This paper attempts to explain, simply, what Best Value is and how to prepare for it. The information presented draws heavily on personal experience as well as published information.

As with any new concept or management tool, *Best Value* comes complete with its own set of jargon and "newspeak". Whilst some of this may appear self-explanatory, much of it requires some definition.

What is Best Value?

Best Value is the Labour Government's strategy to ensure Council services:

- reflect the needs of local communities
- are accountable to those communities
- are the best available in terms of efficiency, effectiveness and economy

There is no set formula or pattern for Best Value; *"what is best is what works"*.

Best Value is not simply a replacement for the rigid Compulsory Competitive Tendering regime imposed on Council Direct Service Organisations by the Conservative Government in the 1980's. Instead, it is an all-embracing concept affecting every local authority service.

Since April 2000 there has been a legal requirement for all Councils in England and Wales to review all services over a 5 year cycle, with the aim of reviewing about 20% a year.

In Scotland, Wales and some Pilot Authorities in England, Best Value has been on the go since 1998 and approaches to the process vary. For example, some Councils are reviewing part of each service each year, as in Dundee, whilst others are reviewing whole Departments at once. Currently Dundee is undertaking its' third round of reviews.

Since Performance Monitoring is a key feature, Best Value has been described (somewhat cynically) as Continuously Review All Performance.

Principal Best Value Methodologies

Based on our experiences in Scotland so far, there are three main models for Best Value Reviews: -

1. **Market Testing** - which involves a process of other people tendering for *your* work and, of course, *you* tendering for *your* own work.
2. **Benchmarking** - which involves comparing how well *you* do things against a recognised set of criteria (these *may* be national Performance Indicators or agreed between a "Benchmarking Club" of similar organisations, e.g. Museums.
3. **Pilot Study** - this covers a wide range of novel approaches to improving a service's relationship with its' customers (= "Stakeholders") and its delivery methods.

Other models *may* be developed in the future as the process evolves.

Best Value; basic principles

There are a number of "guiding principles" relating to Best Value. These aim to ensure a degree of cohesion within the whole review framework without prescribing the details of the review process itself. Again, "what is best is what works".

Whilst the notion of "quicker, better, cheaper" *may* have some relevance in the manufacturing sector, it is of limited application to the provision of public sector (i.e. non-profit) services. Instead, a lexicon of snappy phrases has appeared (borrowed, no doubt, from a succession of tried and failed management fads)

The 4 C's - **Challenge, Compare, Consult, Compete** - form a basis for *any* Best Value review insofar as *they* require *you* to assume:

- that the *status quo may* not necessarily be the best *way* of doing things: Challenge.
- that other organisations *may* operate more effectively: Compare
- that *your* service is not considered worthwhile *by your* users: Consult.
- that whatever services are delivered *may* be more cost *effectively* provided *by* someone who *may* not be *you* - Compete.

The 5 E's - **Efficiency, Effectiveness, Economy, Equity, Environment -**

Preparing for Best Value

As the saying goes, "knowledge is power". With Best Value, when *your* professional existence is under *scrutiny*, insider intelligence is crucial.

To "be prepared" *you* should:

- assess the political climate of *your* Authority: what stance do elected members take on Best Value, direct versus indirect service provision, and security of employment for staff? What is your Authority's track record on CCT (Compulsory Competitive Tendering)?

- Determine the views of your Senior Management: do your Senior Managers have any preconceived ideas of what they want the outcome of Best Value to be? Are they, for instance, loudly proclaiming the virtues of Trust status or quietly hoping to get the whole thing over with as soon as possible?
- Find out how Best Value Reviews are being organised in your Department: "whole service / part service; market testing / benchmarking etc.
- check the remit for the Review that affects you: do you have the opportunity to influence the terms of reference.

If your museum is MGC Registered, you should check your Business Plan for:
- what commitment your organisation gives to Conservation,
- what Performance Indicators relate to Collections Care.

Performance Indicators (PI's), both national and local, are playing an increasingly important part in our working lives. There is a danger that the fundamental tenet of Best Value - meeting local needs - will be overwhelmed by the need, real or perceived, to attain targets set by central government.

National Performance Indicators fall into two "classes. Best Value Performance Indicators (BVPI's) and Audit Commission Performance Indicators (ACPI's). Altogether there are over 170 national Performance Indicators.
Of the BVPI's the following are the most relevant:
BVPI113 - the number of pupils visiting museums and galleries in organised school groups,
BVPI114 - does the local authority have a local cultural strategy?
BVPI 119 - percentage of residents by targeted group satisfied with the authority's cultural and recreational activities.

The important ACPI's are:
15a - the number of museums operated or supported by the authority
15b - the number of those museums that are Registered under the MGC (now Re: Source) Registration Scheme
16a - the number of visits/usages to museums per 1000 population

16b - the number of those visits that were in person per 1000 population
17 - the net cost per visit/usage

Audit Commission PI's are published annually; it's worth checking your Authority's current performance for baseline information across a range of services. ("Know thine enemy".) Remember that national PI's generally relate to the museum service as a whole. PI's specific to conservation and collections care will be found in the Business Plan (also called a Service or Forward Plan). If you are not aware of these, someone hasn't been doing his/her job!

Internal PI's may address such issues as the percentage of the collections meeting MGC standards of collections care or the proportion of conservation staff time spent on remedial conservation or the proportion of staff time taken up by training.

Performance Indicators, not surprisingly, give an indication of how an organisation is performing during a specified time period (usually one financial year) and rely on the results of performance monitoring. The aim, of course, is to measurably improve Performance (achieve more, be more efficient and cost less to run). An organisation's Best Value Performance Plan - BVPP - sets out how it intends to improve performance and over what timescale; this is usually undertaken at the Corporate level with departmental Business Plans being aligned as necessary to fit the council's agenda.

The more informed you are beforehand about your organisation, your Authority and Best Value the better.

A Case Study – Best Valuing Technical and Specialist Services

As we know, there's more than one way to skin a cat so what follows represents only one of many possible routes to successful Best Value.

The Review Group consisted of:
- Review Team Leader (Personnel Department)
- Lead Officer (myself)
- Four team members

The roles played by the group members were:

Review Team Leader
- to act as link to the Chief Executive and the Council Best Value Group
- to approve the review plan and the elements within it
- to monitor and record the process and progress
- to audit any information gathered
- to advise on reporting formats

A good Team Leader makes life much easier in that he/she will be able to translate the views of the elected members and the Chief executive in terms of how much or little work the review group actually needs to do to satisfy the corporate objectives, given that undertaking a Best value Review is in addition to the normal workload.

Also, by getting the Team Leader to analyse and verify any data or statistics you are creating an audit trail should anyone outside the organisation want to check up (e.g. the Audit Commission - Accounts Commission in Scotland - whose job it is to monitor Best Value on behalf of central government)

Lead Officer
- to plan the review
- to allocate tasks to the team members
- to prepare reports etc
- to commission information retrieval and analysis

Team Members
- to gather information
- to prepare and undertake surveys
- to debate findings

The Main Stages

1. Define the service under review
2. Consult the stakeholders

3. Determine the Critical Success Factors
4. Compare the costs of service delivery
5. Undertake an Options Appraisal
6. Develop a Continuous Improvement Strategy
7. Seek Committee approval

1. Define the service under review

- Assess Job Descriptions
- Identify the tasks we perform
- Note the difference between theory and practice
- Rank tasks according to estimates of time spent on them

As a group, we had a good idea of what we were theoretically supposed to do, and we all knew what we actually did. We could also guesstimate how much time was spent on various projects and activities, but we needed statistics that were more definite.

A previous staffing review had given us a format for time recording that was simple but effective so this was re-introduced.

This was analysed by our Personnel Department (as was any other information we collected), which gave us a complete profile for each member of the team.

We were thus able to group our activities into discrete services, such as conservation, taxidermy, exhibition services etc. Since every member of the team is involved in several of these groupings, we developed the equivalent of a "food web".
(As with any food web, if you remove one element it can significantly upset the stability or viability of the whole system).

2. Consult the stakeholders

- Internal, i.e. within the Arts and Heritage Department.
- External, i.e. other Council departments and outside organisations

and individuals. Determine the information required from stakeholders and survey methods to be implemented.
- Undertake surveys and interpret results
  - Defines the "ideal" service
  - Identifies gaps between actual provision and expectations

A **Stakeholder** is any person or group whom has a vested interest in a service, such as visitors, elected members, ratepayers, "friends groups", schoolteachers, grant-giving bodies etc.

We held face-to-face interviews with our internal stakeholders, i.e. the curatorial, design, admin and other staff that we work with. These enabled us to quantify:
- How much of our time was spent on exhibitions, conservation, photography and concerts
- How much of our work was one-off projects or routine
- What quality standards applied (either national, e.g. qualifications required to demonstrate competence or internal quality standards)
- How much of the overall service we supplied was undertaken by us or was already contracted out

We also discovered just how satisfied people were with our overall performance and invited suggestions for improvements.

For external users we conducted a postal survey, from this we found out how they rated the service they had used, and whether they were aware of the other activities we were undertaking.

3. Determine the Critical Success Factors

Critical Success Factors are those without which any service would cease to function and which encourage a potential user to opt for your service, given a choice and all else being equal.
"CSF's" themselves must meet certain criteria, for example, they must:
- Include cost/efficiency.
- Include "quality".
- Refer to the "output".

- Relate to the "end" and not the "means".
- Be sustainable.
- Provide the key-deciding factor that sets your service above all others.
- be met in order to satisfy your service's basic purpose.

From analysing our user surveys, we determined that the following were the most important issues:
- Cost
- Response time
- Attainment of deadlines
- Quality and professional standards
- Diversity of skills

4. Compare the cost of service delivery

This involved three stages, namely

1. Establish our costs; these were:
   - Fixed costs, i.e. overheads such as the portion of building costs and central administration costs set against our service
   - Variable costs, i.e. salaries and revenue expenditure

Any income from our service was set against expenditure.

It is essential that your organisation's Finance Department do these calculations on your behalf because a) it is complicated and b) it creates an audit trail should anyone want to check the figures.

This exercise allowed us to prepare our in-house bid ready for us to
2. Market Test

This is a formal process based on the legal "closed bid" process the Council follows with any major contract. For this stage we had to:

- Prepare the specification for a "Notice of Indicative Prices".
- Identify potential alternative suppliers of our services.

- Invite Tenders following the Council's Tendering process.
- Submit our in-house bid as part of tendering process.

Having "packaged" our services, we invited tenders for each of them from one or more potential contractors. We also invited tenders for the service as a whole. A total of 15 "Tender Documents" were issued.

3. Compare costs

This was the decisive moment; the Chief Executive saw the bids before we did. Only then could we see how we actually compared with the "competition".

Of the 15 documents issued, only six were returned.

The bids were scrutinised to check that they were valid (i.e. met the specification) and the results tabulated for ease of comparison.

(The specification included clauses relating to professional standards and qualifications, sub-contracting, availability for out-of-hours or emergency working, public liability, insurance etc.)

5. Undertake an Option: Appraisal

To do this, you must
- Consider *all* Critical Success Factors
- Consider the consequences of different options
- Verify cost implications

In looking at the options, remember that cost is only one consideration; cheaper does not necessarily mean better value.

We argued that collections care requires the highest professional standards and that the needs of mixed collections typical of provincial museums are not best served by the occasional visit from a private conservator, particularly when the emphasis is on preventive conservation.

When the costs were analysed, we found that we were cheaper in real terms than our private sector counterparts in virtually every aspect of our work.

Due to the "food web", effect referred to above (where all the services we provide are dependent on more than one member of the team) we discovered that the partial contracting-out of our services would have been the most expensive option.

In fact, we do buy in skills and services when it is appropriate, as do most museum organisations, and one of our main recommendations was to retain this "mixed economy" approach. This was based in part on the fact that is cost effective but also on the grounds of the Council's responsibilities towards the wider economic well being of the community it serves by using the services of local, self-employed, conservation-related professionals.

Our recommended option was to "retain in-house service provision whilst optimising the opportunities for outsourcing, income generation and the establishment of new services to meet stakeholder requirements".

6. Develop a "Continuous Improvement" strategy

Best Value is not about establishing how efficient/cheap you are, and then leaving it at that. The underlying core of the process is to establish your baseline and improve your performance in relation to it.

Whilst responding to quantitative results from stakeholder surveys (e.g. improving response times to requests for work by x% per annum) is a fundamental part of continuous improvement, setting strategic goals is equally important. In our case, the team was already putting together a Development Strategy, which set out our objectives for improving collections care and raising additional finance in the face of budget and staffing cut backs as well as a greater emphasis on contemporary and performing arts activities as opposed to heritage activities. This was an important element of our Continuous Improvement strategy.

Whilst our Chief Officer had been kept up to date with developments, her input at this stage was vital in preparing our final report, particularly with regard to the prevailing political climate and how she expected the Arts and Heritage service to develop.

In Dundee Best Value reports follow the standard committee report format and are presented to Council through the Best Value sub-committee once approved by the head of department.

After several adjustments at the suggestion of both our Chief Officer and the Review Team Leader our final report, recommending retention of the in-house team, was approved by the council.

We then informed all those who had tendered for the service of the outcome of the review.

As a result of the process, we as a team feel more secure, for the time being, having proved our case. We can concentrate on continuing to provide and improve our services to the Department and ultimately to the public.

The Constitution of The Natural Sciences Conservation Group

1. Name

The name of the charity shall be the Natural Sciences Conservation Group, (or other such name as the Trustees may from time to time decide with approval from the Charity Commissioners).

The Group (hereinafter called "the charity") is an unincorporated association with Charity Trustees elected by its members.

2. Objects

The objects of the charity shall be:

2.1. To advance the education of the public in natural science collections conservation.

2.2. To promote for the benefit of the public, the highest standards in the conservation, development, preparation, care and display of natural science collections and specimens.

3. Powers

In addition to any other powers which the Trustees may exercise the following powers in furtherance of their objects.

3.1. Power to encourage and develop education, training and research in natural science conservation through publications, regular meetings and seminars.

3.2. Power to raise funds and to invite and receive contributions, provided that in raising funds the trustees shall not undertake any substantial permanent trading activities.

3.3. Power to invest the funds of the charity in any of the investments for the time being authorised for the investment of trust funds.

3.4. The Trustees shall have the power to provide indemnity insurance for themselves out of the income of the charity provided that any such insurance shall not extend to any claim arising from any act or omission which the Trustees knew to