

social impact audit

August 2002

FOR THE SOUTH WEST MUSEUMS LIBRARIES & ARCHIVES COUNCIL

Prepared by

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SWMLAC

SOUTH WEST MUSEUMS LIBRARIES & ARCHIVES COUNCIL

The South West Museums Libraries & Archives Council (SWMLAC) is the regional development agency for museums, libraries and archived, covering the counties of Bristol, Cornwall, Devon, Dorset, Gloucestershire, Somerset and Wiltshire, the Isles of Scilly and the Channel Islands. It is part of a network of eight regional agencies set up by Resource: the Council for Museums, Archives and Libraries.

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EXECUTIVE SUMMARY

INTRODUCTION

The study was initiated by Museums, Archives and Libraries South West and was funded by Resource the Council for Museums Archives and Libraries. The research was designed and undertaken by the Centre for Public Libraries and Information in Society (CPLIS) at the University of Sheffield. It developed the methodology used in their previous social audit of public library services in Newcastle and Somerset, and sought to familiarise service professionals with the techniques involved. The present study involved staff in eight organizations, drawn from archive, library and museum services in the South West.

PROJECT AIMS, OUTPUTS, AND OUTCOMES

The aim of the study was to assess the collaborative impact of archives, libraries and museums in terms of promoting social cohesion, fostering social inclusion and encouraging lifelong learning. Specifically it sought to:

- Illuminate where and how museums, archives, and libraries made an impact.
- Develop an approach to this evaluation, which would be useful to colleagues in other parts of the UK.
- Inform the lifelong learning agendas of the participating organizations.
- Stimulate innovative thinking about meeting social purpose and priorities.
- Lead to further cross sector working.

The following outputs and outcomes were anticipated:

Outputs

- A Do-It-Yourself social impact audit technique and an analysis of its strengths and weaknesses.
- Workshops and summative seminars to build confidence in using the model
- A succinct report on the work undertaken and the results of the social impact audits
- Publications in appropriate academic and professional journals

Outcomes

- Service managers with experience and confidence in undertaking social impact audits in their sector
- Service managers with a clearer picture of how their service impacts on individuals and local communities
- Ideas on how to develop services more effectively to engage with target groups and meet social objectives.
- A knowledge base to enable stakeholders to assess performance and benchmark improvements regarding the social impact of archives, libraries, and museum services

Eight institutions, a combination of museums, archives and libraries in the region elected to participate. Each studied a particular project or aspect of service provision, which they felt had significant local community effects.

METHODOLOGY

The methodology explores the social consequences of service objectives on select groups of stakeholders. The rich, qualitative data that are returned through interviews and focus groups involving users, non-users and other stakeholders creates a tool to fine-tune institutional policy and illuminate strengths and weaknesses not normally obtainable through quantitative approaches.

SUMMARY OF RESULTS

Although the results were modest and there were variations between projects, the data show that museums, archives, and libraries do have a social impact. In addition the project demonstrates that the social audit technique enables the development of a framework for an informed value judgement. In the time available it was rarely possible to identify more than intermediate outcomes but nevertheless, five broad themes emerged from the reports of the individual service audits

Learning

A contribution to learning was identifiable in all eight of the projects studied, although none of the services had identified learning in their specific project objectives. Focus group participants identified both formal and informal learning through their use of museums, libraries and archives.

Community Identity and Social Cohesion

Respondents clearly perceived the services as providing resources for building social capital. The institutional buildings were perceived as local landmarks and sources of civic pride, places to meet and to spend leisure time. Archives offered opportunities for newly arrived members of a community to put down roots. Museums held reminders of shared societal events and aided in the construction of communal memory. Libraries were seen as a hub for information about local service provision.

Economic Value

The data suggest that cultural institutions contribute economic value in a community. The tourism industry was seen as a beneficiary of the work undertaken by museums and archives. Respondents were aware that libraries offered resources for networking, business information, and skills development.

Equity and Access

Issues of physical, sensory, intellectual, psychological, and financial access were raised by the focus groups in all eight services. Overall the attitude of most of the professionals was one that reflected awareness of and engagement with their service's particular strengths and weaknesses.

Management Issues

How a public-sector cultural service is managed can significantly affect overall social outcomes. The following issues emerged as particularly important:

Awareness and Marketing

This subject was raised by focus groups in all eight services as an area that needed significant attention.

Service Image

The image of the service was important to both users and providers. The perception of these services as “leisure services” was identified as a factor in service provision, organisational structuring, and allocation of funding.

Facilities: Location, Access, and Aesthetics

The data indicate that buildings can have a significant effect on social impact. The sense of “place”, and the provision of comfort and access was an important issue for respondents.

The Social Audit Training Experience

According to the responses from the staff involved in the project, the entire audit process created a satisfactory level of confidence in working with qualitative data techniques, and specifically in conducting focus groups. All of the services encountered problems with the time constraints of the study (10 months). Some also found the initial recruitment of focus group participants difficult and time consuming. Several respondents encountered problems in synthesizing and analysing the results using the guidelines that the research team provided. Overall, however, respondents did feel that the process allowed them to obtain a richer form of data that they could bring to bear in demonstrating the impact of their work to their governing authorities and funders. Some mentioned that this project created situations for further work with their users.

RECOMMENDATIONS

The study identified five issues that need to be considered by public museums, libraries and archives:

- Services must increase the regularity of two-way conversations with the public (e.g. regular social audits). There must be an asking, listening and acting on stakeholder’s interests through outcome-based evaluations.
- There needs to be an awareness of the significance of initial conditions for programmes. In other words, social objectives must be clear, relevant, strategic (this means taking a long term view, with a consideration of the ultimate consequences), and respecting of stakeholder’s interests (including the staff who must provide the service).
- Social impact auditing must build trust through honest, open, and accessible execution. The relationship between social objectives and stakeholder’s interests are made visible through a system of outcome-based evaluative techniques, including the social impact audit technique explored in this project.
- Services must be willing to act and follow-through, adjusting their objectives, and finding new and creative routes to producing their final services. Expectations are increased in the public when a dialogue is conducted rather than a monologue.
- And finally, an increase in financial and human resources is required to establish in the capabilities to conduct outcome-based assessment.

CONCLUSION

The study shows that archives, libraries and museums create opportunities for people to engage with others in a shared space, proffering the raw materials for education and the crafting of social capital that can help bind communities together.

The social audit process offers a tool for listening to stakeholders and informing policy makers. Qualitative data, obtained via social audits are valid evidence and should be used by professionals and policy makers to inform and improve the management of cultural organizations.

1 Introduction

The answer to life, the universe, and everything is...42

Douglas Adams, *Hitchhiker's Guide to the Galaxy*

There is a demand for information that can reduce problems in the human condition to simple factors that can be counted. And if the honest answers to life, the universe, and everything could be controlled in comfortable, faithfully reproducible numbers like the answer from the computer *Deep Thought* in Douglas Adams' *Hitchhiker's Guide To The Galaxy*, researchers may be able to develop perfect models for fixing what ails managers the world over. However, as David Boyle points out in his book *Tyranny of Numbers*,

The big problem is what numbers won't tell you. They won't interpret. They won't inspire and they won't tell you what causes what.

In terms of understanding how our social institutions influence us, quantitative knowledge alone is insufficient. The story is richer and often less clear than the apparent precision of statistical data. Managers must be prepared to use indicators that use "soft" as well as "hard" data. In the words of a County Librarian they,

need to focus on performance measurement which is meaningful to the user (i.e. qualitative) rather than convenient in Audit Commission terms. (quoted in Usherwood 1996)

Moreover, as the Comedia report (*Borrowed Time* 1993) argued, traditional performance indicators cannot measure the quality of the relationship between a library and the users in its geographical area. Comedia have revisited this argument in their publication, *Beyond Book Issues* (1997), and, as its title suggests, seeks to develop performance indicators other than the simple number of books issued or visitors through the door. Their suggested "measures" include such things as the "proportion of staff time dedicated to contact with the public" (Matarasso 1997). However in some ways these are only "milestone indicators", in that, although they go part of the way, they still tend to tell us more about outputs than outcomes.

Managers in the museums, archives, and libraries of the southwest region sought to explore people's experiences from a fuller perspective, with a view to accounting for the end effects rather than just the means for getting there. They wanted to expose, or make visible, the influence of their work on the communities that they served, and to do that they set out to learn a set of techniques we are calling a social impact

audit. Pared down to its essential elements it involved working cross-sectorally, between local government authorities to identify social goals and asking the stakeholders if these goals were being met. In other words, museums, archives, and libraries that often have professional disciplinary boundaries worked together to examine common strategic interests such as lifelong learning, creating social identity, fostering equity and encouraging economic benefits. It also meant breaking out of the sometimes-rigid lines of county jurisdictions, and cooperating across authority boundaries, hopefully producing more appropriate solutions to local issues in the region.

The aim of the project was to assess the collaborative impact of archives, libraries and museums in terms of promoting social cohesion, fostering social inclusion and encouraging lifelong learning. Specifically it sought to:

- Illuminate where and how the three domains made an impact.
- Develop an approach to this evaluation, which would be useful to colleagues in other parts of the UK.
- Inform the lifelong learning agendas of the participating organizations.
- Stimulate innovative thinking about meeting social purpose and priorities.
- Lead to further cross sector working.

The research used the social impact audit methodology developed in previous work carried out by the University of Sheffield to explore the interaction between museum, archive, and library services and their communities. The methodology focuses on the aims, inputs, outputs and outcomes. An integral part of the project was to enable members of an organisation or service to use the methodology effectively.

1.1 Expected outputs from the project were:

- A Do-It-Yourself social impact audit technique and an analysis of its strengths and weaknesses. (The various elements of the technique are included in the appendices)
- Workshops and summative seminars to build confidence in using the model
- A succinct report on the work undertaken and the results of the social impact audits
- Publications in appropriate academic and professional journals

1.2 Expected outcomes from the project were:

- Service managers with experience and confidence in undertaking social impact audits in their sector
- Service managers with a clearer picture of how their service impacts on individuals and local communities
- Ideas on how to develop services more effectively to engage with target groups and meet social objectives.
- A knowledge base to enable stakeholders to assess performance and benchmark improvements regarding the social impact of archives, libraries, and museum services

According to Zadek and Evans of the New Economics Foundation, the social impact audit process begins by identifying and clarifying the values by which an organisation is judged (See appendix 14). These values form the crucial initial conditions and frame the goals or outcomes for an organisation's stakeholders. It is hoped that the participating services and the public sector cultural organisations throughout the region will take up this process of examining values and engaging with their stakeholders.

1.3 Conclusions

The results of this project have been relatively modest. This is not surprising given the number of services involved, the timeframe for conducting the data collection and analysis (10 months), and the nature of the various service objectives under scrutiny. That having been said, for all intents and purposes this project has shown that the social impact audit methodology is a useful one, and placed in concert with other tools for outcome evaluation can provide a rich system for public participation and improving service efficiency and effectiveness.

2 Methodology

The methodology for assessing outcomes has been further developed as an integral part of the University of Sheffield's social impact audit of museums, archives, and libraries in the South West region. The research has been funded by Resource and managed by the South West Museums Council on behalf of Museums Archives and Libraries South West (MALSW). It sought to make sense of complex public sector outcomes. Some writers, (e.g. Percy-Smith 1992) have made a distinction between social impact audits in the private sector—which they describe as social accounting, since businesses ultimately seeks income for their shareholders—and those that address the effect of public policy on people. Perhaps the distinctive feature of the public sector, compared to the private sector, is that it exists to meet needs.

2.1 Audit Training Process

In assessing the social impact of museums, archives and libraries in the South West region the project built on previous social impact audits undertaken by the University of Sheffield's Centre for Public Library and Information in Society (CPLIS). A new feature of this study was the audit training program designed to familiarise staff with the social audit approach.

A participant questionnaire (See appendix 11) was circulated following the completion of the summary reports and formative workshop. Overall the response from the services is that the process has been useful. It allowed services to work across disciplinary sectors (museums, archives and libraries auditing each other's work), as well as inter-authority (Bristol audited Dorset and Plymouth audited Devon). We wanted to create a step-by-step process (see combined appendices) that included independent service selection; mission analysis: identifying, justifying and critiquing aims and objectives in terms of social impacts for specific projects, targeted stakeholders or geographical areas; developing collaborative and flexible research instruments that allowed qualitative data collection through key personal interviews and structured focus groups; independent analysis of themes that emerged from the data with reference to the service objectives; and finally corporate discussion of crucial aspects of the audit results in terms of policy integration. All of the coordination occurred between the individual services being audited, with only

limited oversight provided by CPLIS. Telephone and electronic mail played a crucial role in maintaining personal contact throughout the auditing. More importantly, cross-domain connections occurred on a face-to-face basis either through the initial training workshops or through an arrangement to travel that was budgeted into the overall research project. According to the responses from the service questionnaires, the entire audit process created a level of confidence in working with qualitative data techniques, and specifically in conducting focus groups. The training workshops provided an opportunity to clarify project objectives, to role-play through a focus group scenario, and interact with colleagues across disciplines and governing authorities. All of the services encountered problems with the time constraints of the project, since it limited the scale and therefore the details that could be analysed. Some also found the initial recruitment of focus group participants difficult and time consuming, especially non-users that the services had no normal channels for reaching. However, some mentioned that this project created situations for further work with their users. And finally, several encountered problems in synthesizing and analysing the results using the guidelines that the research team provided. Ultimately, however, the organisations did feel that the process allowed them to obtain a richer form of data that they could bring to bear in justifying their work to their governing authorities and funders.

The social impact audit process starts by examining institutional objectives, and tacitly calls into question, or at least requires the examination and justification of, means and ends. Its efficiency as a method for institutions is that it asks questions of the recipients concerning the services' efficacy in creating the desired outcomes. An institution's initial conditions are essential to establishing a trajectory that is both beneficial to its intended targets, and the providers who are working to reach those targets. Therefore, fundamental to the success of the project was the initial step of identifying the project to be audited and its objectives. Several of the services lacked specific and explicit objectives, and many did not target social elements for auditing. This confirms Alison and Coalter's (2001) observation that,

There is a lack of clearly stated purposes and objectives for museums, accompanied by a failure to monitor the extent to which objectives are being met...

In the library sector Coalter (2001) argues that the emphasis on social impact,

is an attempt to move beyond established library functions.

There is perhaps less agreement on the social aims in the museum world with some commentators describing them as,

Distorted priorities (that) are destroying local museums. (Appleton 2002)

That having been said clear objectives are required in all cultural organisations if assessments are to succeed. There is a keen desire among some of the services to acquire a method of evaluation that might work to support political and funding agendas within the local authority. Those already familiar with Best Value, benchmarking, and quantitative Audit Commission reports can find the seemingly anecdotal nature of interviews, questionnaires and focus groups to be less rigorous and scientific. Indeed, Alison and Coalter argue that,

The mostly qualitative and often anecdotal examples of the social impact of museums cannot be taken to be representative of the work of the diverse museum sector. Rather they indicate the potential of museums under certain conditions and in certain locations and research undertaken by museums is often not publicly available.

However, as pointed out later in this report, the work undertaken in the South West provides a framework for informed judgement and reflects back to the service providers useful opinions that may then be compared to published or unpublished aims and objectives. As shown by the focus group responses throughout this report, evidence of social impact can be extracted from such “conversations”.

Due to the timetable for the project several of the services neglected or were unable to target groups that were demographically considered to be socially excluded or marginalized. Some services had a very limited number of focus groups or perhaps only included staff rather than non-users or other strategic stakeholders. Others held focus groups with significantly small numbers and created the effect of a group interview rather than the richer dynamic of a multi-vocal discourse. In the end, the services appreciated the opportunity to interact with the public and hear their responses. For some it allowed them to begin a relationship for further assessment in the future.

The research instruments used by staff were created by CPLIS in consultation with the services, and were intended to provide a broad and oblique approach to exploring the conjunction of institutional objectives and public experiences. The four

or five questions (see appendix 9) were used in roughly the same form by all eight of the services in order to achieve some continuity for analysis in this report. Because each project had different objectives, the focus group questions needed to be both broad and overlapping in their intent. During the sessions the facilitator was often required to make real-time adjustments and clarifications in order to overcome technical or jargon-laden terminology and work for nuanced responses by the group.

Many of these details must be taken into account when considering the overall analysis of the results of the specific service audits, and clearly there are areas for improvement, but the work produced a baseline to enable staff to engage in further assessment. Regularisation of the process into the overall structure of the service's organisation will, we believe, allow many of the discrepancies encountered in these initial audits to be overcome. This initial social impact audit produced a level of confidence to enable participants to undertake further assessments and may allow these services to be a resource to other cultural organisations in the region.

2.2 Literature Search

Initial work began with a literature search that examined the breadth of the cultural services field and the broader social science literature dealing with outcomes in the not-for-profit sector. We were also aware of several other projects related to the social impact of public sector cultural services; the findings from these, where appropriate have been integrated into this final report. Policy statements and local authority information on the service or project areas to be audited were also examined to inform the design of research instruments.

2.3 Steering Group (See appendix 1)

Many of the concerns of this study involved public policy, and we recognized that such matters could raise difficulties of bias and objectivity. We were also aware of the problems in assessing evidence, such as the biases of the researchers and service staff conducting the audits, and decided from the outset to work with a steering group that reflected a wide range of professional views and opinions. This Steering Group met four times in the course of the project. In addition to representatives from the South West region, the group included a representative

from the Audit Commission. Together the members of the group brought a range of professional and policy perspectives to the research.

2.4 Initial Interviews with Service Heads

After the South West Museums Council had invited participation in the project, an initial set of interviews was conducted with the heads of various services throughout the southwest region who responded positively. These interviews involved a semi-structured, and prompted interview schedule (Appendix 3). As a result, eight authorities were identified to take part in the audit:

- a. Bristol City Libraries and Information Services
- b. Bristol City Museum and Art Gallery
- c. Cheltenham Art Gallery and Museum
- d. Dorset Record Office and Museums Advisory Service
- e. Devon Record Office
- f. North Devon Museum Service
- g. Gloucestershire Record Office
- h. The Plymouth Naval Tradition Project (primarily involving City Museum and Gallery, Plymouth Library and Information Services, Plymouth and West Devon Record Office)

2.5 Training Workshops

Training sessions were held in Plymouth, Bristol and Gloucester. During these sessions the basic framework of social impact auditing was presented (appendix 4). This included an overview of the purpose, components, and benefits of the audit process as well as a review of previous work undertaken with Newcastle and Somerset Library services. Attendees explored ways of selecting and prioritising their service's aims and objectives (Appendices 5 and 6). They also received a basic introduction to focus groups, and collected additional data through role-playing and other group exercises.

2.6 Identification of Stakeholders

As mentioned earlier, the stakeholder concept is key to the social impact audit technique. Stakeholders are, according to Zadek, any individual or group that affects or is affected by the organisation (Zadek 1994). The stakeholders for this

study included staff and volunteers, as well as users and non-users from a variety of demographic backgrounds. The intent was to cross-check the views and perceptions of different stakeholders in order to obtain as full a view as possible of the social impact of the cultural service's activities.

2.7 Focus groups

The Centre for Public Libraries and Information in Society (CPLIS) and Information Management Associates conducted four of the eight audits, while the remaining four were audited by the staff from participating authorities. While none of the audits involved all categories of stakeholders, patrons with disability or financial disadvantage, and those of different age groups and genders were included. Groups included, for example, senior citizen social clubs, young mothers groups and youth training organisations, local historical societies, as well as staff and volunteers within a particular service. The study did not include any children of primary grade or younger.

The interview guides (Appendix 9) used with the groups were designed with reference to the aims and objectives of the particular project to be assessed. Holding focus groups allowed data to be obtained from a larger number of respondents and for people to develop their original responses after they heard other people's views (Patton, 1990). All of the focus groups were audio recorded and notes taken by a silent observer.

2.8 Data analysis

In practice, the data collection, analysis and writing blended into one another (Mellon, 1990). Initial findings were noted whilst the fieldwork was still being carried out and these were presented to the Steering Group. All the steering group meetings were used to develop ideas and refine findings.

2.9 Post-Audit Workshop

The initial summary reports that were generated for the eight projects examined responses by the focus groups to the stated aims and objectives of the service or project being audited. This comparison revealed patterns in the data that were analysed on a thematic basis, and as a result two themes were selected for

discussion in a post-audit workshop (See appendix 11). This was used as a means of refining the individual audit findings. Marketing and stakeholder awareness emerged as one theme, and the stakeholder's use of the services in terms of leisure time, as the second. Discussions at the workshop were transcribed and used to form this final report.

2.10 Validity of the findings

Generalising from qualitative findings has been described as an 'impossibility' (Patton, 1987). However, the findings from the present study reflect what was found in eight specific locations, and suggest that reasonable 'extrapolations' are possible, (Cronbach, in Patton, 1987) and that they can be applied to 'other situations under similar, but not identical, conditions' (Patton, 1987).

Data were collected from a variety of sources, using different techniques, including, one-to-one interviews with service managers (Appendix 3), focus groups, and pre-existing written material. Para-professional and professional staff were interviewed, and eight case study locations were used. The project researchers carried out the interviews, while focus groups were facilitated by independent service staff or contracted researchers. At the same time, the Steering Group brought additional perspectives to the research process.

Social impact auditing, like financial auditing, relies on the honesty of the auditors and their use of the data. This social impact audit used qualitative data that truly reflect the situations found. Illustrative quotations have been chosen on that basis and are used to exemplify our key findings. While staff internal to the organisation can use the technique, the New Economics Foundation insists on an external verification process (Zadek, 1994). Therefore during this project all the auditors were from outside the services being audited, and an independent steering group oversaw the research.

It was tempting to try to provide a complete and foolproof model for measuring social impact, but it is a temptation we have resisted because as Smith (1996) suggests,

[There is a] need for very careful modelling before drawing any conclusions on the efficacy of a particular management team or programme. In practice, it is almost always impossible to measure all the relevant variables, and it must be

accepted that the analysis is both incomplete and partisan, in the sense that a particular set of stakeholders' values are being used.

In our original proposal we noted that objective quantification of social impact is not possible, however, it is practical to develop a framework for an informed value judgement (See appendix 14). We believe that we have made some progress towards that framework, and developed a practical tool that can be used by practising librarians, archivists and museologists. The success or failure of this in practice will be influenced, to some extent, by the research culture and infrastructure of the organisation concerned.

This framework enables us to identify some of the matches, mismatches, and differences between an organisation's social objectives and the intermediate and final outcomes of the service. These can be discussed with the policy makers and professionals responsible for the service, and the reasons for those matches, mismatches, and differences analysed in terms of the various components of the audit. Managers, armed with this information, can then take appropriate action to maximise the matches and minimise the mismatches.

3 Purpose and Value to the Community

This report does not attempt to display the results of individual service audits, since this was done on a case-by-case basis in summary reports submitted by the independent auditors. Reports on the individual projects are confidential to the authorities concerned, but will be discussed with managers and policy makers in those authorities. It is also expected that they will be shared amongst the eight participating organisations as part of the overall learning process. Representative quotations given below have been chosen to illustrate the overall conclusions from the data obtained from the eight individual audits. This report examines the overall tenor of the findings and presents a picture of how the process of training public sector cultural services in the methods of systematic and rigorous qualitative outcome-based evaluation might serve as a framework for informed judgement in policy formulation.

Overall, the general attitude shared by the focus group participants was one of satisfaction, and a recognition that services truly contributed to a better quality of life. Even the non-users felt that the services were essential to the make-up of the community and represented good value for money. Most would have been eager to see the services playing an even more prominent role in their lives. The responses are discussed under the following headings.

3.1 Learning

In a 2000 policy document, the then Secretary for Education and Employment, David Blunkett and the then Secretary for Culture Media and Sport, Chris Smith declared that,

Learning is at the heart of this Government's agenda because it is the key to a rich life for individuals and prosperity for the nation. Through its programme of education reform, the Government is seeking to create the 'learning habit' across the country, so that people of all ages can understand and enjoy the great cultural achievements of the past and the present, and gain the skills, attitudes and knowledge they need to contribute to and share in the information and communication age of this new century. (DCMS 2000)

This idea was carried further in a document produced by Resource,

The aim is to create a learning culture in which individuals and communities take charge of their own learning and recognise its importance both in

meeting their own goals and in building a strong economy and an inclusive society. (2001a)

The Resource document went on to say,

There is no sector-wide agreement about what is meant by 'learning' in museums, archives and libraries, how it should be supported, or how it should shape the work of these institutions. (2001a)

This lack of clarity is borne out to some extent by the eight services in our project. Although most of them recognise that learning should be one of their primary outcomes, none of the projects we examined had stated objectives specific to learning. On the other hand, many of the focus group participants mentioned it as a result of their contact with a museum, library, or record office.

Both Record Offices and Museums' role as stewards of heritage resources meant that people accessed them in order to learn from the past, and about the past

You can always learn from the past, if you can't access the past, you can't learn from it." It ".can help solve today's problems by reference to yesterday's information". Gloucestershire Record Office

Some wise chap said if you don't know where you come from you probably don't know where you're going. Cheltenham Art Gallery and Museum

Schools are targeted, and take advantage of these services, however formal education out-reach was not an issue that was identified by the services in this audit as central for their raison d'etre. Indeed as Resource observed:

While museums, archives, and libraries may support the formal curriculum, they are not constrained by this role. Museums, archives and libraries also provide safe places which can encourage people let down by the formal system to come back into learning. (Resource 2001a)

Several focus group participants focused on different aspects of learning:

I suppose I partly come here from the education point of view to sort of reinforce good habits for the children. If they are doing it from an early age and they keep coming. I am actually quite surprised at how much – I mean they are very good in the Arts place. They also enjoy doing the trail every time, but I think it's just to get them into the sort of feeling of a museum, or a library or something, is well worth going to. I know there was on time when they brought a lot of Hartcliffe kids up here, and you know they crowded the place out. That seemed like a really good idea, and they were really enjoying it. Bristol City Museum and Art Gallery

This appears to echo a research brief presented to the Department of Education and Employment, the Tavistock Institute notes:

Informal learning is to some extent synonymous with widening participation—but in a broader sense than acting as a bridge between conventional education and training, and employability. We would therefore define it as the active engagement by citizens in the construction, interpretation and often, re-shaping of their own social identity and social reality. (2000)

Other participants repeated how,

School groups come in and look at original documents. That's always well received. Dorset Record Office

I don't use the library that much, but my ten-year-old son uses the reference books. I've heard they've done stuff to the Central Library Bristol Libraries

The educational element appeared often to be linked to leisure activities, indicated by museum “fun-day” participants or family history hunters in the archives, or hang-out for teenagers:

If it's something that I feel will definitely appeal to me then I would come down and see it myself. A lot of it is whether it's appealed to the children as well, I suppose. Bristol City Museum and Art Gallery

If you have any sort of interest in history, that's the place to go and find out a bit more. Gloucestershire Record Office

It should be seen as a fun place, not a dull place...a place to pull girls... Bristol Libraries

Leisure is a factor noted by museologist Eilean Hooper-Greenhill, in terms of the museum community, but can be equally applied to many roles taken up by libraries and archives:

The museum has become an establishment for learning and enjoyment...The reinterpretation of this fundamental museum function is placed on the one hand within the world of education but on the other enters a new and rapidly growing world that of a leisure and tourism industry dedicated to pleasure and consumerism... It is the educational potential of museums, founded on their unique collections, that gives them their particular market niche within the leisure industry. (1996)

In terms of life-long learning agendas, many of the responses encompassed the idea of using services well into adulthood for pleasure and enlightenment. One respondent noted that patrons were encouraged to pursue further formal education after using their service:

I did a research diploma at Bournemouth University. Dorset Record Office

And another responded:

I took up Latin because I felt I needed it. Thoroughly enjoyed it. Dorset Record Office

Closely tied to the idea of informal learning is the issue of access. The Resource report says,

The learning agenda cannot be separated from the access agenda. People cannot engage with or use collections and resources unless they have physical, sensory, intellectual, financial, and cultural access to them. (2001a)

Several of the services have clearly targeted children for inclusion:

By getting children in to start with—children are not going to be excluded. Cheltenham Art Gallery and Museum

Issues of equity and access are raised by the perceived intellectual slant of some of the museum exhibitions. These can seem “intimidating” to patrons.

...It's irrelevant to the working class of the city, which make up two thirds of the city. Bristol City Museum and Art Gallery

and

It is intimidating of people with mental disabilities. At the end of the day it is not marketed on – I don't like the term of grass roots – but it's not marketed on a grass root level. So at the end of the day most people are going to say 'what's it all about mate'. Bristol City Museum and Art Gallery

Learning styles vary between people when encountering museums, and as Anderson writes in *A Common Wealth*,

people will only visit a museum if they believe they will find it interesting...for some people this means personal engagement with an object...but people who have different learning styles and patterns of intelligence may want to participate through social and practical activities. (1999).

The Resource report asserts that,

It is very difficult to measure how the museum, archive or library experience affects learning. Almost every museum, library or archive user is a voluntary user, and learning in these contexts is often informal and experimental, with impacts on feelings and attitudes rather than leading to the acquisition of concepts. (2001a)

What emerged from all eight of the services participating in the present project is that members of the public perceived them as resources for learning and encountering new experiences.

As a tool, the social impact audit approach can be tailored to assess the success or failure of a service in achieving specific social and or educational objectives. This can help policy makers and others seeking to determine ‘value for money’ and the

effectiveness of service outcomes. Resource, for example hopes to achieve particular social outcomes with the direct aid of museums, archives, and libraries:

Attainment levels of students in the formal education system- drawing people back into formal learning- developing skills, self-confidence and motivation- the quality of people's lives and their involvement with society the valuable contribution which museums, archives and libraries can make to political agendas and in particular to initiatives aimed at tackling social inclusion, neighbourhood renewal and urban regeneration. (2001a)

It may be that the qualitative data gleaned will prove a useful determinant to achieving these larger policy goals.

3.2 Community Identity and Social Cohesion

In terms of social impact markers, community identity and social cohesion have been selected regularly (Matarasso 1993, 1997; Coalter 2001; Resource 2000, 2001; Anderson 1999; NCA 2001). However, as Barnett and Crowther point out in an examination of community identity in the twenty-first century, notions of community are dynamic, and can be at odds with the government's intentions, including those of policy makers and funders:

Community thus "tends to be a God word", and has at times escaped intellectual rigour, being perceived either as a lost ideal past or as a future to be aspired to. Thus: below the surface of many community studies lurk value judgements of varying degrees of explicitness about what constitutes the good life. (1998:427)

They go on to point out that,

the Redcliffe-Maud Commission in 1969 and the review by the local government Commission for England in the early 1990s both illustrate that the concept of community has been viewed very much in terms of economic interaction. Both Commissions have given attention to the concept of "community" and have recognised the problems caused by its elusive nature. (1998:426)

If, as Barnett and Cowther insist, the concepts of community are contested, and have no clear definition as an objective for social attainment, this may be a product of being able to measure a community defined in terms of economic welfare rather than happiness, justice and freedom—values that they note are not,

subject to ready quantification and are thus difficult to account for in any evaluative model of welfare (1998:431).

It is suggested that professionals in the cultural sector can act as an effective catalyst to the formation of social capital if they are aware how different communities

go about accumulating or creating it. Several of the focus group respondents recognised the value of the services in providing such social capital resources.

Old photos of Bristol draw people in. You had people from Hartcliffe saying, "Look at this". It helps build a sense of community. Bristol City Museum and Art Gallery

Its a good place for people from different social backgrounds to mix. Bristol City Museum and Art Gallery

...Lots of myths and legends in our family were destroyed by a diligent nephew's research. Gloucestershire Record Office

A recent Local Government Association report looks to services such as museums, archives and libraries to contribute to the growth of such social capital:

The 'people-oriented' nature of cultural services, concerned with personal and social development, can make a substantial contribution to the 'people-centred' policy agenda, which aims to develop both social capital (strengthening community networks/capacities) and personal capital (developing skills and confidence). (Coalter 2001)

The responses from focus groups in nearly all of the services audited bear this out. It may be noted that the Museums and Record Offices, responses indicate how the "past" or local heritage provide the link to the present community identity. The idea that these services operate as a kind of identity or cultural insurance is revealed by quotes from focus group members:

If this place burned down tomorrow you'd lose a sense of identity—the whole of society is based on the past. Gloucestershire Record Office

Giving a sense of belonging and thread of history going back into the past can be important to people. Dorset Record Office

It...makes you feel some sort of kinship with the area, with the past, that seems to be important to people. Gloucestershire Record Office

Both Record Offices and Museums were noted for their contribution to those newly arrived in the community as a resource to allow them to establish "roots".

It can't create a community out of one that is not there already—but might give an existing community something more. Gloucestershire Record Office

Community identity is central to this issue...fostering community identity. Devon Record Office

Respondents indicated that 'place' is a valued commodity for building community identity. They identified cultural services as a source of local prestige and a focal point for the area.

As a big city like Bristol we really should have a fantastic museum, and people come to see it from a long way away. Bristol City Museum and Art Gallery

The library is at the bottom of the shopping list...if the Council's attitudes towards the libraries was changed from being a chore...let's get our library service out and make it a proud part of our heritage for hundreds of years... Bristol Libraries

It gives the elderly a peaceful place to read... Bristol Libraries

I wish we'd had one (a museum) where I came from...it's what makes you want to come and live in a town. Cheltenham Art Gallery and Museum

There's a sense of pride in Cheltenham, which the museum backs up with its history Cheltenham Art Gallery and Museum

The simple fact that these services are in the community means that people potentially have access to resources of local identity, materials specifically linked and unique to the area. Many of the projects audited were considered part of a learning process in terms of how to build social capital since they allowed users to network and interact with one another in ways that they had not previously. They were perceived as repositories of public knowledge that can be returned to as and when they are needed, and provide a physical and social focus for civic engagement. This emerged noticeably in the success of the Plymouth Naval Tradition project:

People felt like they were part of something worthwhile

It showed that history is a tool that brings people together

A Plymouth respondent succinctly noted the intertwined social impacts that cultural services can have within a community:

We needed a vision to come together in a tangible way. There is a ripple effect of wealth and community building, but growth is slow. Self-esteem is part of growth.

Several of the services included volunteers in their focus groups in order to explore some the internal issues raised by their objectives. Not only are the volunteers vital to the day-to-day running of many of these organisations, but also their presence is witness to the role these cultural institutions play in providing community cohesion. In the recent Resource report *Renaissance in the Regions*, Selwood provided the statistics for the museum industry:

Almost two thirds of museums involve volunteers - between 19,000 and 25,000 volunteers were active in and over half UK museums are supported by

Friends organisations, of which there are some 730 with an estimated total of around half a million members. (2001b)

Sociologists such as Urry (1995), Fyfe and Ross (1996), and MacDonald (1997) suggest that heritage, leisure, and cultural experiences involve activities that pursue spectacle since they are visual behaviours that 'take in' objects and texts with the eyes and visually consume them under a 'tourist gaze'. Behaviour such as museum and gallery visitation, or reading 'best sellers', provides a way for individuals to identify themselves with certain groups or communities, and thereby accumulate a stock of social capital—the building blocks of community identity and cohesion.

In terms of library use the notion of a touristic experience may be more strained. Though the concept of collecting signs or cultural signifiers can certainly be accomplished through a visit to the local public library, it is understood to be a repository of cultural signifiers in the form of texts, and increasingly, the images of video. The extent to which the library cannot cater to this tourist-consumer paradigm may be an indication of why public libraries were not utilised by many of the focus group respondents. While reading for leisure topped the list of reasons given for using the local library in the Bristol focus groups, many indicated that personal access to the Internet, as well as on-line and large, chain bookshops were the preferred sources for reading material. The following quotes from the Bristol Library focus groups indicate some possible cause for concern:

Access to the Internet takes away a lot of the need to go...

I'm more inclined to bookshops. They have up to date and the books that I needed. Where in the library the nearest date is the 1970's edition...old editions can be off-putting

You can use Amazon.com

These indicate the importance of developing flexible and responsive institutions able to meet the needs of different markets.

The notion of community identity clearly emerged as significant in all eight projects. All the organisations contributed to its development. However, it will take further, regularly targeted, nuanced, and collective techniques to determine precisely how and why this is the case.

3.3 Economic Value

The findings from this social impact audit can be understood to supplement those of the major study undertaken to examine the economic impact by museums in the South West region (Brand, Gripaios, and McVittie 2000). Overall the focus group respondents at first found it difficult to make a connection between economics and cultural services. However, after further consideration respondents did see a connection between regeneration and economic prosperity and the work of cultural organisations.

In the Bristol Libraries focus group the renovations to the Central Library were noted more than once, despite the fact that the focus group participants were intended to be served by branch libraries. Mention was also made of small business information:

It's a good place for us to get information when we're applying for grants.

And opportunities for networking:

It's a chance to communicate. That's what I use the Internet for. It's a community notice board.

Tourism was readily identified by most of the museum and Record office focus groups as an economic contribution. In this context, the overview of recreational activities throughout the country on the British government's *TradePartners* web site is worth noting at length since their web presence exists to assist British business export their "product" overseas:

Tourism is worth about £300 billion in the UK, is one of the world's biggest industries and is growing fast. It caters for a range of demands from family holiday to business travellers and is often an engine to regeneration of the heritage with which it has symbiotic relationship. Tourism provides income for conservation of built and natural heritage and yet can also damage the environment.

Being the 5th largest tourism destination in the world and with a history of continuous government and social structures, the UK is well experienced in the management of its heritage, tourism and museums, and UK consultants have a wealth of experience and skills. 'Culture and heritage' remain key reasons for choosing travel destinations, even for business travellers. They are quoted by over 60% of visitors to the UK. It is unsurprising therefore that tourism is one of the world's largest industries and is still growing.

The UK is famous for its history, its pomp, its ability to put on a show. It also knows how to help others to care for their past, to help others maintain a sense of their own identity through museums, galleries and buildings, to help others to manage their tourism. These skills are being put to good use on projects throughout the world, ranging from restoration and conservation,

through marketing plans for tourism destinations, to interactive displays for museums.

*The UK has considerable experience in the management of **heritage, museums and tourism services** (sic).*

<http://www.tradepartners.gov.uk/recreation/profile/index/overview.shtml>)

The phenomenon of tourism can be understood in the broader sense of visually taking into oneself an experience of things, places, or events. The act of seeing or spectating is a socially privileged behaviour, and the 'tourist gaze' performed by people reading books, attending an exhibition, or witnessing an authentic, primary document is an important outcome of cultural services (see Urry 1990, Urry 1995, Urry and Rojek 1997, MacDonald 1995). People move about in order to engage in these activities, and as they do they often pay for the privilege of doing so. Many of the focus group participants saw tourism as the cultural sector's single biggest contributor to the South West's economy:

[There is] a growth industry in local history...people are thirsty to have easy access which links up with the travelling aspect. Devon Record Office

It brings tourists into the area that come and visit. Cheltenham Art Gallery and Museum

As a big city like Bristol we really should have a fantastic museum, and people come to see it from a long way away. Bristol City Museum and Art Gallery

As mentioned in the section on Identity, a focus group participant in Plymouth argued that the service scheme contributed a key element in the work these services are doing; by building a sense of identity and self-esteem they contribute to a climate in which growth can take place.

Apart from the tourist monies generated, the local economy benefits from the positive quality-of-life that museums, archives and libraries sustain, and if done well it can have a marked knock-on effect.

This feeds into other projects like New Deal, so it has income generating potential Plymouth Naval Tradition Project

A good library in St. Paul's would attract a better class of people with a good new resource. Bristol Libraries

They need quite a bit more investment...something the younger generation can get into Bristol Libraries

3.4 Equity and Access

Work done by Linley and Usherwood in a 1998 social impact audit of Newcastle and Somerset highlighted several issues facing libraries in terms of equity and access. Their distinctions between equality of opportunity, equality of condition, and equality of outcome, are relevant here:

A distinction is made between equality of opportunity and equality of condition. Equality of opportunity relates to universal access to social institutions. The related concept of equality of condition encompasses the idea that individuals may be disadvantaged by circumstance, so 'for equal opportunity to have any significant content it is essential to guarantee equality of condition, that is, all competitors in the race should start at the same point with appropriate handicaps.' Finally, there is equality of result or outcome, in which the aim is to achieve, through political programmes in favour of disadvantaged groups, 'a meaningful equality of opportunity'. (Linley and Usherwood 1998: 59)

The Dorset Record Office selected access for people with disabilities as the focus of their audit.

The Dorset Record Office is very good for the disabled.

At the reception desk there is now one of those induction loops. This is very nice. Makes no end of difference. A big one right round the lecture room would be a great boon.

The front door is one of our biggest failures for disabled people.

The auditor also noted that respondents saw the toilet and refreshment areas as problematic, as well as some of the equipment and spacing throughout the reading room for wheelchair access.

Reading on the viewers for people in a wheelchair is no good if stuck between two people because the chairs they use are only two thirds the size of a wheelchair – not much room.

Many of the problems were overcome through special staff attention:

Always greeted with a smile

Staff are the best

For several respondents the architecture of the building helped accessibility. The Dorset Record Office operates on the ground floor, as does the Bristol City Museum and Art Gallery's Temporary Exhibit Program:

It's quite nice that you know it's on the main floor. You make a beeline for that exhibition. They want to see the new exhibits. Bristol City Museum and Art Gallery

Physical, sensory, and intellectual access were issues for several of the services, but psychological barriers were also noted:

I am a disabled person and I cannot, without a very lot of pain quickly, stroll. I can walk anywhere, but pottering around museums is absolutely deadly for me. I have to sit down very regularly. You try to find somewhere to sit in a bloody museum. Bristol City Museum and Art Gallery

Like I say you are made to feel like a second-class citizen, because you have got to ring a bell and go through the back. Why can't you just come in from the front? They are lovely marble steps, but I would rip that out and stick a ramp in. You know, why not? Bristol City Museum and Art Gallery

You feel intimidated to be honest with you...Where at the end of the day, the wording on the leaflet, some of the people I know wouldn't understand it. It's very intellectual; it's not from a ground level. It's just intimidating. Bristol City Museum and Art Gallery

Sometimes you get confused, you know what you want but you don't know how to get it. It needs to be more like the shops—"Can I help You?" Bristol Libraries

...It can be scary, especially if you've never been introduced to books. Bristol Libraries

A similar sort of intimidation was mentioned for the Gloucestershire and Dorset Record Offices in not knowing where things were located, how to use certain equipment, or not knowing who to ask for help.

Some people are a little unnerved at coming to a record office. They think it's going to be something terribly complicated and high faluting. Dorset Record Office

Problems of access can occur for a number of reasons including class and its related financial barriers. For public sector services, entrance fees were not an issue, however other services that might involve a charge could be, including late fines for library books. Two contrasting views of class were mentioned during the Bristol City Museum and Art Gallery focus group:

To be honest with you, apart from the slavery, which served the black and white working class of this city, they're (the exhibits) irrelevant to the working class of the city, which make up two thirds of the city

It's a good place for people from different social backgrounds to mix.

The Devon Record Office attempted to address the problem of rural isolation through their Service Point Scheme:

Growth industry in local history...people are thirsty to have easy access which links up with the travelling aspect

For the Bristol Library, most focus group participants who used the library appreciated the freedom of access.

A lot of places you need to spend a lot of money to hang out. Libraries are free, and you can further your education and do free research.

A lot of people can't afford to buy books especially low-income families

I'm glad it's there for older people. It's a meeting place and the price of books today to buy is impossible on a pension

It's helpful for study—it was a good move to bring in computers.

The tenor of these points is reiterated in general about libraries in Coalter's research for the Local Government Association:

Many commentators suggest that the key feature of public libraries, and one which underpins their potential, is their inclusiveness and the perception of them as being a 'safe' environment. (2001)

One final issue of access returns to the idea of these services providing a two-way conversation, one that the public can hear and respond to. Many of the non-users and even some of the users of these services mentioned that they were not aware of the types of resources that were available through these organisations. Part of this problem comes down to marketing and promotion (an issue to be taken up in more detail in the next section on management). Respondents from all of the focus groups saw this as an area for improvement.

I did a little survey of about 20 people and nobody knew there was a record office Gloucestershire Record Office

If people did but know what exactly was available, people would be coming here in their droves. I'm sure they would. Dorset Record Office

Raise the profile—I've forgotten about the library. I used to use it as a kid. Bristol Libraries

I think at the end of the day – I don't know. It's got to be on radio, it's got to be advertised. It's got to be in the 'Evening Post'. Bristol City Museum and Art Gallery

...We need to create habits that people can use for themselves...sustained publicity is needed. Plymouth Naval Tradition

Selwood's recent analysis of museum markets suggests that:

All museums should have access to centralised or regionally co-ordinated programme of quality marketing and business management training. (2001)

Target marketing would allow a more strategic use of resources, and include more diverse groups of people. What Hooper-Greenhill suggests for the museum community can be applied equally to libraries and archives:

...Museums must communicate or die. For communication to occur both the sender and the receiver of the message must share the same concepts even the same passions. The task for museums and galleries is to find ways of arousing and instilling passions and ways of exploring ideas that people will find illuminating, using the collections of the museum, and the curiosity and experience of actual and potential visitors.

...Museums must become more open, more democratic, more responsive and more professional...The functions of the museum as a communicator must be integrated with the functions of the museum as a storehouse for collections, and the knowledge of collections must be related to and generated by the knowledge of the audience. (Hooper-Greenhill 1996)

Overall the attitude of most of the professionals was one that reflected awareness of and engagement with the issues involved. It was recognised that some of the answers were to be found in the management of the projects and the project organisations. It is this that is the subject of the next section.

4 Management Issues

The data suggest that the extent to which the service fulfils equity, or any other of its social objectives, depends to some degree on how the service and the parent organization are managed, and also on other factors outside the immediate control of staff. Factors that have been identified as helping or hindering the attainment of social objectives include financial resources, marketing and awareness of the service, perceived image, structure and staff attitudes, while other factors less in the control of staff are the location of a service, its architectural design and the fear of crime in the community.

4.1 Awareness and Marketing

Focus groups from all eight of the projects raised issues of marketing and awareness. Some sample responses are given below:

I'd like to know more about what's going on... Bristol Library

You need more advertising. I only find out about things after they've already happened. Bristol Library

First people have to be aware of the resource. If opportunities were made for people to find out more initially, that may spark an interest. Dorset Record Office

Increased interest in family history link in with the services here. Something like that could be extended to give people an overview as to how they could find that information. Dorset Record Office

This year more people will holiday in the UK so the Museum needs to publicise its exhibitions more widely—it could attract more people in. Bristol City Museum and Art Gallery

It's a missed opportunity if it hasn't raised awareness of the work of museums and libraries... Plymouth Naval Tradition Project

As suggested in the previous section on Equity and Access, reaching out to the public in order to communicate a message is a multifaceted endeavour with many intended and unintended consequences—but it must be done. The following observation by Ambrose and Paine can be applied to any cultural service, not just museums:

In a market-led institution the needs and preferences of the customer or user group will have considerable influence on exhibition policy. And even a museum which is not overtly responding to customer demands would

nevertheless be prudent to take note of the visitors' views, lest it find itself without any. (1993)

Selwood encourages the notion of market segmentation:

...staff need help to segment their market sensibly and develop parallel strategies to appeal to different sectors. (2001)

The idea of targeting markets was also raised by focus groups participants. Many of them identified the connections between formal institutions of learning and the cultural services, and also local mass media outlets:

Got to diversify to get people interested Dorset Record Office

And what about sort of complementing what we see on television, because what struck me when I went to the wildlife photography exhibition was, it was a huge audience of these programmes on television, and this is like seeing still frames from the David Attenborough thing, which most people watch...
Bristol City Museum and Art Gallery

It needs to be flagged up more especially in the schools. Bristol Libraries

The notion of using mass media to promote the archives was mentioned in the 2001 social inclusion audit of the National Council on Archives:

Many respondents felt that the key to solving the low profile of archives in the public consciousness was to start by contributing more pro-actively where archives are used by the mass media.

Most of the projects that are the subject of this present study could claim at least some successes on the issue of marketing and awareness. For Plymouth the benefits of their marketing work needed to be sustained beyond the short term project funding:

It raised awareness

It sparked a lot of interest

It enabled us to do things not done before

With funding for only one year, sustainability is a problem. Groups with their own agenda need to work together.

On the other hand, Devon Record Office's Service Point Scheme, their service was nearly at capacity and,

...just about coping now with enquiries...

It would be difficult to meet any increased demand with the current level of staffing and resources.

The theme of awareness and marketing was a focal point for the services in the post-focus group workshop (see appendix 11). Service managers were aware of the need for publicity and the range of media at their disposal for the purpose of marketing. However, the issue of too much undifferentiated information going out to the public, along with the myriad of alternatives competing for public leisure attention, were perceived to make their efforts at marketing and awareness more difficult. There is a lack of money and professional expertise for advertising and marketing in these organizations, which limited their ability to engage in the more expensive and effective measures of marketing used in the commercial sector. They also found it difficult to select and evaluate those approaches that were being used. This is highlighted by the work done by the South West Regional Archive Sector. It reports that:

In terms of visitor satisfaction with the services and facilities available in the region's repositories, no detailed information is available for the South West as a whole.

One final issue of note stemmed from a dilemma in initiating the social inclusion agenda in terms of value for money. Some respondents perceived a disproportionate investment in staff time and money for a noticeably limited return in terms of people considered socially excluded. There may be any number of reasons that non-users choose not to take up the resources being provided. It was suggested that many of these may have nothing to do with physical, sensory, intellectual, or financial issues of accessibility:

Non-visitors account for not going on the basis that there was 'nothing of particular interest'. ... they would find it difficult to get there, or to get around; it would be boring; the children wouldn't be interested; or, that it is not open when they had time to visit (MORI, 1999:13, quoted in Selwood 2001)

In terms of strategies for marketing, Selwood also remarks that,

It is unhelpful to burden them with the goal of blanket popular access. (2001)

At the same time Hooper-Greenhill mentions that.

Audiences are now understood to be active, decisive, working for their own agendas, and well able to refuse to be communicated to if they do not want to be. Genuine communication is a shared process. It is now understood that audiences are not large and undifferentiated but made up of a great many individuals that can be grouped into specific groups with special needs...The mass audience has fragmented. New concepts have emerged, of audience segments, target audiences, and niche marketing: in other words differentiated products for specific groups of people. (Hooper-Greenhill 1994)

4.2 Service Image

A second theme explored during the post-audit workshop attempted to expose the extent to which a service's *use* image affected its stakeholders, both staff and policy-makers "inside" the service, as well as the public users "outside" the service.

A notion that came to the fore in a tacit form was that of the services performing a role in both personal and community quality-of-life as a leisure pursuit. The term 'leisure' is used advisedly and understood as the mode through which the public often use the services. It is a category that is clearly associated in the literature with the cultural industries (Urry 1995, Hooper-Greenhill 1996, Linley and Usherwood 1998, Anderson 1999, Falk and Dierking 2000, Alison and Coalter 2001, Coalter 2001, SWRC 2001). The image of museums, libraries and archives being primarily utilized during voluntary, non-work activities may have effects in how they operate, including allocation of funding, structuring within government, and attitude in the provision of services.

The danger of miscategorising the service's image was noted during the workshop:

...administrative convenience determines where you end up rather than how public perceive the service provided. One of the problems is that we analyse more than the public.

Within local government, which department you are put into affects how you're seen...

...cuts to services dependent of which department your sector has been placed in.

...if seen as part of recreational arena this affects how you see who your competitors are. If in education service then different set of competitors.

The image of recreation, play, and leisure suggested to the service participants something that was frivolous, short-term, and trivial, and yet, by-and-large most of the focus groups throughout the service's audits took up the services in their leisure time. However, the users may describe a myriad of non-frivolous, long-term, and significant outcomes, including the subjects already mentioned in this report: learning, identity, or even financial gain. Of relevance to this discussion is Fred

Coalter and John Taylor's research for the Local Government Association concerning children's play

(http://www.lga.gov.uk/Documents/Briefing/Our_Work/culture/play.pdf). Their work may be applied in many respects to adults and their varieties of play.

People do indeed play hard, they take their leisure pursuits seriously, and there is great merit in pleasurable learning experiences done informally, over a lifetime. The question raised here is whether seeing these services as being taken up in pursuit of pleasure during free time affects how the users expect to be treated and how they understand the resources they encounter? There is an expectation of comfort and ease by the public if it is to engage in pleasurable activities. The services will have a greater impact, with more thorough satisfaction by greater numbers, if this image of leisure is taken into account.

The late political philosopher at the London School of Economics, Michael Oakeshott, in an essay on work and play considered the idea of play as a,

leisure activity not only because it belongs to the occasions when we are set free (or set ourselves free) from 'work,' but because it is performed in a leisurely manner...it means without anxieties and absence of cessation that belongs to the satisfaction of wants. (1995)

By adding the element of leisure, play, or recreation to an understanding of the overall perception of a service's images, it may benefit both user and provider. Since these services are used under the auspices of leisure activities, anything done in accommodating the user in that mindset will have a greater impact—including a lessening of anxieties induced elsewhere in society.

4.3 Facilities: Location, Access and Aesthetics

The shared spaces that museums, archives, and libraries create can dramatically impact people's lives. The location, appearance, safety and functionality of the buildings that these services inhabit cause a marked response by the public. For example as reported in Grennhalgh's 1995 work about libraries' social space:

...the neutrality of the library and the claim to serve the higher sphere of general interest establishes public libraries as safe and legitimate places for most people. Public libraries create non-discriminating spaces for people to be (Greenhalgh 1995)

More recently, Proctor, et al's research on library closure suggests that:

I think that socially, libraries provide an excuse to get out of the house and meet people ...good for any age group who find themselves lonely (Proctor 1996)

For many people the very location of the service was a mystery, and once they had located it, parking became the issue. Even simple things such as the awareness of the opening hours could be a problem:

I've never been in. I didn't know it was there

We could do with more parking spaces. We spent 20 minutes trying to find a space.

I don't know the opening hours...

The comments from Bristol branch libraries and Bristol City Museum and Art Gallery can be understood to be representative of the types of issues that the public encounters with civic architecture. Several of these statements concern basic accessibility issues, but they also refer to aesthetic issues:

It could be more inviting. Libraries are supposed to be quiet and this one is dingy and dark. Bristol Libraries

It needs a coat of paint. Bristol Libraries

It would be more enjoyable if the seats were more comfortable... You need a place that you can read comfortably and sit there longer. Bristol Libraries

It's a wonderful building. And as Bristol is going to be the city of culture in 2008, this is one thing that was on top of the culture list isn't it? Bristol City Museum and Art Gallery

They might have quite a lot of items in storage, which aren't on display. It might be interesting to know what is in storage and have access to the things like notes. It's a pity that there are things that have been saved for years, and it's probably stuffed downstairs in the basement, that hasn't seen the light of day or people seeing it for a long time. Bristol City Museum and Art Gallery

I think that you could do more to the outside of the building, because it actually doesn't welcome you. The bars going against the road, so you have got to come in - with people's prams around the steps are really awkward to get up with pushchairs. I think that if you brought some of the exhibitions outside and made it alive with lighting, cardboard cut outs and things like that, made it more modern. That would be more enticing. A lot of people haven't been in for years and years. Bristol City Museum and Art Gallery

It's really awkward getting upstairs. Normally we just don't bother going upstairs. I didn't know that they had any lifts here. Bristol City Museum and Art Gallery

For libraries, competition for relaxed space exists in the form of the overstuffed chair and cafe in the local large chain bookshop. Recent work at the University of

Sheffield indicates that younger and more affluent people prefer using larger, chain bookshops (Cartwright 2001).

In addition, research shows that a space's appeal is made up of the small things such as lighting, comfortable seating, cleanliness, clear signage and location of the toilets, baby-changing facilities and lifts. Physical maintenance adds to the health and attractiveness that cause people to feel safe and wish to linger in social circumstances.

5 Conclusions and Recommendations

The social audit process described in this report takes people seriously by taking into account issues that are either too complex to be represented by a statistic or too sensitive to be treated as a number. It is a technique that enables conversation, it needs to be understood to be only one tool among an entire set of tools that forms a system to enable the publicly provided cultural services to be more than an irrelevant, bureaucratic, money-pit. The image of a deaf and paternalistic governmental organisation can be changed if these services learn to listen and act in a careful and considered manner. The virtue of giving stakeholders the right to be heard, as David Boyle declares in his book *The Tyranny of Numbers* (2000),

gives social audits a kind of objectivity which simple market research doesn't have ...

Social impact auditing within museums, libraries, and archives demonstrates that the services can be responsive and empowering in their end products, in their outcomes.

The technique of social impact auditing we presented in our training workshops offers several benefits: it is relatively simple and inexpensive, highly flexible and designed to return rigorously evaluated results on targeted programs. After this project we are prepared to say that it is a learnable methodology and has merits for creating a legacy of usefulness within the public services—one that strengthens existing programs and justifies changing or eliminating malfunctioning or useless ones.

So do these services impact on their society in the ways that they want to, or in the ways they aim to do? The answer is "yes", although it is not an unequivocal yes". The results indicate that a portion of the public is receiving the benefits that the services set out to provide.

There are five major themes taken up in this report: learning, community identity and social cohesion, economic value, equity and access, and a variety of management issues including, marketing and awareness, service image, and the state of the institution's facilities.

Museums, archives, and libraries facilitate learning in an informal manner, and are having a noticeable effect in the area of lifelong learning. What was absent from the objectives in all eight services was any indication concerning the justification for the nature of the content for learning with their collection or stock. This may risk promoting learning without understanding what people want to learn and may warrant further assessment.

The theme of community identity and social cohesion was detected in all eight services and they are clearly making an impact in this respect. If the idea of visual consumerism is applied to the understanding of community identity, then museums, archives, and libraries each have something to contribute. They are repositories of public knowledge, holding resources of shared identity and creating factors that bind society together and build social capital.

The focus group participants clearly understood economic value in terms of tourism for the museums and archives. The economic benefits of the library were less clear, though it was seen as source of information that might serve businesses and contribute to quality-of-life, thus promoting growth.

Awareness and marketing clearly emerged as an issue needing attention. A dearth of resources in time, money and expertise often conspired against frequent and compelling effects. Most focus group participants wanted to be told about the benefits of these services and indicated that they would welcome such useful news.

For the purposes of this research we presented the terms of recreation, leisure, or play because they describe a mode through which the public often use and understand cultural services. We believe that an understanding of the leisure and pleasure elements can affect the delivery, funding and use of the service.

Facilities in terms of access, location, and maintenance contributed greatly to the overall image and usability of these services in the opinion of the focus groups. It is an area that should certainly be addressed if impact is to be improved.

On the basis of the social audit, five broad overarching actions need to be considered by museums, archives, libraries and public cultural services, and flow from engaging in outcome-based evaluation.

—Services must increase the regularity of two-way conversations with the public (regular social audits). There must be an asking, listening and acting on stakeholder's interests through outcome-based evaluations.

—There needs to be an awareness of the significance of initial conditions for programs. In other words, social objectives must be clear, relevant, strategic (this means taking a long term view, with a consideration of the ultimate consequences), and respecting of stakeholder's interests (including the staff who must provide the service).

—The relationship between social objectives and stakeholder's interests are made visible through a system of outcome-based evaluative techniques, including the social impact audit technique explored in this project. Social impact auditing must build trust through honest, open, and accessible execution.

—Expectations are increased in the public when a dialogue is conducted rather than a monologue. Services must be willing to act and follow-through, adjusting their objectives, and finding new and creative routes to producing their final services.

—And finally, an increase in financial and human resources is essential to build in the capabilities to conduct outcome-based qualitative assessment.

We recommend a regularisation of the social audit method into the normal policy architecture of these services. In order to obtain data on social impact through this method, a careful consideration of social objectives must be made. Over the long-term, the services will need to collect information in a way that continually refers back to the original objectives [focus groups + existing data: institutional statistics, demographic data, quantitative data]. There will always be unintended consequences revealed in the course of conducting a social impact audit. Part of the feedback system is re-evaluating the service or project objectives in light of the responses.

The social impact audit framework undertaken by the eight public sector services in this study is designed to be one approach among many that will initiate a learning process, and continually move organisations toward better provision of service and a clearer understanding of how their work can benefit society.

These community institutions create an opportunity for people to engage with others in a shared space, proffering the raw materials to craft the social capital that can bind communities together. In their role of speaking and acting in the community it is incumbent upon cultural institutions to listen and act with consensus, and the social impact audit process offers a tool for listening. This report is testimony to the virtue of the conversation that these eight projects are now engaged.

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Appendix 1 Steering Group Members

Kate Osborne, South West Museums Council

Victoria Pirie, Russell-Cotes Art Gallery and Museum

Bill Sanderson, Audit Commission

Rob Froud, Somerset Libraries Arts and Information/Chair South Western Regional
Library System

Paul Brough, Cornwall Record Office/Chair South West Regional Archives Council

Debs Tritton, Regional Archives Development Officer

Lynne Osborne, Devon Library and Information Service

Appendix 2 Service Participants

Bristol City Museum and Art Gallery
Queens Road, Bristol, BS8 1RL
Tel. 0117 922 3600

Bristol City Library
College Green, Bristol BS1 5TL
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Cheltenham Art Gallery and Museum
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Tel. 0124 223 7431

Devon Record Office
Castle Street, Exeter, EX4 3PU
Tel. 01392 384253

Gloucestershire Record Office
Clarence Row Alvin Street Gloucester GL1 3DW
Tel. 0145 242 5295

Dorset Record Office
Bridport Road Dorchester DT1 1RP
Tel. 0130 525 0550

Plymouth Library and Information Services
Drake Circus PLYMOUTH PL4 8AL
Tel. 01752 305907/8

North Devon Museum Services
Barnstaple Museum, The Square BARNSTAPLE EX32 8LN
Tel. 01271 373003

Appendix 3 Heads of Service Interview Guide

South West Social Impact audit Programme

PROJECT NAME _____

I'd like to ask you some questions about your service/project and then some questions about becoming involved in the social impact audit programme.

What are the social objectives of your service/project?

[In own words or by reference to service/project/corporate objectives] If there is a printed document can we have a copy please?

[For projects] What led you to set up this project at this particular time?

[For services] Has the direction of your service, or its priorities, changed recently?

[If yes] In what ways?

Who do you see as the main stakeholders in your project/service?

Who are the main target audiences for your project/service?

Are there any obvious ways of engaging with the target audiences to obtain feedback? *[e.g. existing groups; events?]*

What are the planned outcomes for the project?

Turning to the Social Impact audit Programme:

What, if anything, do you understand by the term 'social audit'?

[Negotiate meaning with respondent]

*"Social auditing is the process whereby an organisation can account for its **social performance**, report on and **improve** that performance. It assesses the **social impact and ethical behaviour** of an organisation **in relation to its aims and those of its stakeholders**"- New Economics Foundation*

What led you to bid to be involved in the Social Audit Programme?

What, for you, would be successful outcomes from involvement with the Social Audit Programme?

A key element in the Social Audit Programme is to train members of your staff in the basics of social auditing. Are there any obvious people to be involved in this training?

Where and when? *[Negotiate preferences: one day or two halves? Where? July? August? Early September?]*

How do you view the possibility of your staff auditing another project and your project being audited by staff from an outside organization?

Is there anything else you would like to say about your project/service or the Social Audit Programme?

[If on same wavelength, say that we would like to work with them.]

Notes for interviewer

I've called this a programme to avoid confusion with the various projects bidding for involvement with us.

I see these interviews as an informal project selection process aimed at finding out whether the projects/services have sufficient common ground with us to justify involvement in the programme. This boils down to:

the clarity of their aims (we can fine tune these during our workshops)

their willingness to support the programme

their willingness to involve their staff in the training and subsequent review activity

whether there are advantages for them in getting involved (or whether they see potential advantages).

Italics are for our use and to suggest prompts – not to be read out as part of the question!

Appendix 4 Social Impact audit Training Workshop Agenda

10:00 Introduction (10mins)

What is a social audit and why do we want one? Card sort (45mins) (See Appendix 5)

COFFEE (15mins)

Definitions. (10)

What do we want to achieve through the Social Audit Approach? (Group work) (30mins)

Social Audit in practice. (40mins)

Social objectives of the project / service and what are we doing to achieve them : (Individual project group(s) (30)

12. 45 LUNCH

13. 30 Running a Focus Group, and other methods of data collection (60)

Issues in conducting a social audit for your project or service (Focus Group exercise) (60mins)

Impact on practice (30mins)

Conclusion and questions

16. 30 CLOSE

The programme will start and finish on time but will allow for flexibility during the day.

Equipment required

OHP and screen

Flip chart and pens

Appendix 5 Ways of Gathering Evidence of Impact

	Investigated by Professional Staff	Investigated by Others
Observe	<ol style="list-style-type: none"> 1. Work shadowing 2. Capturing informal observations 3. Structured observation 	<ol style="list-style-type: none"> 1. Work shadowing 2. Hired consultants 3. Student assignments
Ask	<ol style="list-style-type: none"> 4. Critical incident interviews 5. Surveys 6. Structured focus groups 7. Accompanied visits 	<ol style="list-style-type: none"> 4. Hired consultants 5. Student assignments 6. Institution-wide surveys
Infer	<ol style="list-style-type: none"> 8. Documentation (<i>e.g. student assignments; curriculum plans</i>) 9. Apparent changes in levels of activity 10. Apparent gains in confidence 	<ol style="list-style-type: none"> 7. Teacher views of student behaviour 8. Teacher interpretations based on assignments

From Information Management Associates
<http://www.informat.org/prtb10.html> Accessed 15/4/02

Appendix 6 Nine Diamond Card Sort Activity

Various types of **card-sort activity** should give you focused information (and they are fun to do). If you want to stimulate discussion about service priorities (or, if you must, specific services): generate your own set of key propositions in relation to your theme; then type and stick each proposition (about 20-24 propositions are ideal) on 5 x 3 cards or 'Post-its'; divide people into **small** groups (not more than 4 people); then ask them to sort one set of the cards per group in one of several ways, of which two are described below:

- a. ask people to organise the cards into a meaningful pattern, shape or flowchart, adding their own ideas on blank sheets if they wish. Then de-brief each group in turn by asking them to explain what they have produced and why, picking up on points of similarity and difference between groups, or
- b. ask people to reject all but nine of the cards (they can add their own ideas on blank cards at this point) and arrange the chosen nine in diamond formation (the words below each represent one card):

		FIRST		
	SECOND		TIER	
THE		THIRD		TIER
	FOURTH		TIER	
		FIFTH		

The idea of this 'nine diamond' is to force prioritisation without wasting time over the 'in-between' rank order. Then debrief across the groups by asking what people placed first and why, what went into the second tier and why; what people threw out easily and why; and what they added in (if anything) and why.

General points:

1. Allow ample time (25-30 minutes) for sorting activities (including small group discussion)
2. *Allow at least 5-10 minutes per group when de-briefing (even working across groups)*
3. Use flip chart to catch most of the content and, if possible, get a colleague to take notes of the discussion.

From Information Management Associates

<http://www.informat.org/prtb10.html> Accessed 15/4/02

Appendix 7 Steps in the Social impact audit Process

- Step 1 Collect a clear statement of aims and objectives of what is being audited
- Step 2 Determine from those aims and objectives what stakeholders best to target
- Step 3 Chose themes you wish to explore and assess
- Step 4 Design focus group questionnaire and interview guide
- Step 5 Select focus groups (4-6 for large projects)
- Step 6 Record and transcribe the results of the focus group
- Step 7 Analyse and report results (involves literature search, and coding findings to themes)

What CPLIS Does	What You Do	Date To Be Achieved
CPLIS support	Collect clear and specific aims and objectives for the project being audited (have it submitted by the audited service)	Approx 1 month
CPLIS support	Identify stakeholders and chose 4-6 groups for focus groups (with the aid of the service being audited using ready-made groups such as: WI, Football Club, Historic Society, after-school groups, support groups: parent, disability, etc)	
CPLIS support	Chose themes you want to see returns for in the audit findings, this is derived from the aims and objectives	
Design Research Instruments: Focus Group Questions, Interview Guide	In consultation with CPLIS	
Administrative Support for transcription	Conduct 4-6 focus groups including recording and transcription, one hour each; interview key figures, not more than one hour in length This involves: Establishing with the groups a venue, date, and time Distributing a demographic and release sheet Determining a fee paid, if any Arranging refreshments Setting up and running recording instruments	Approx 1 month
Literature Search Notes for conducting analysis	Analysis of Data, looking for quotable quotes, patterns, themes—in the context of the objectives	Approx 2 weeks
Write Research Synthesis	Write summary Report	Approx 2 weeks

Appendix 8 Service Aims and Objectives*

*As submitted to CPLIS

Plymouth Naval Tradition

1. Improved resources in community libraries and the Central Library
2. Creation of new, multi-media resource materials
3. Forging of links/partnerships between community local history groups and the library and museum services
4. Strengthening working relationships between providers – library and museum services; Naval Base Museum; TSW Film and TV archive
5. Raising local community awareness of their locality and its heritage and the resources available
6. Kick-start a publications programme

Bristol City Museum and Art Gallery

Unwritten, Tacit Aims and Objectives for Temporary Exhibition Program

- To attract more visitors by appealing to a wider range of people than the museum's permanent displays
- To provide the impetus and funding for innovative outreach and education work on subjects not represented in the museum's collections
- To provide for communities in Bristol whose cultural heritage is not represented in the museum's collections
- To give people a reason to make repeat visits to the museum
- To give people access to those collections in store which cannot usually be seen

Cheltenham Art Gallery and Museum

- To assess Art Gallery and Museum's impact on community (St. Paul's Ward) on our doorstep
- To check-out effectiveness of mission statement in relation to this community, to make: "collections accessible to an increasingly broad public in a way that communicates, educates and inspires" and some of our objectives, namely:
 1. "to provide access for all... with a strong emphasis on helping those in the community who are less able to help themselves"
 2. "to help the local community establish its identity, by focusing on what is special about its history and present life"
 3. "to develop a sense of local pride and belonging"
 4. "to provide an important educational resource"
- To check out what this community sees our role is, or should be

North Devon Museum Service

Vision for Museums.

Museums enable people to explore collections for inspiration, learning and enjoyment. They are institutions that collect, safeguard and make accessible artefacts and specimens, which they hold in trust for society. The Registered Museums of Northern Devon, both public and voluntary, will carry out this role in a spirit of partnership and inclusion

Aim 1 - Access and Inclusion

Aim 2 - Quality and Relevance

Aim 3 - Economic Vitality and Regeneration

Aim 4 - Identity and Community

Gloucestershire Record Office

Apply the mission statement: *to acquire, preserve, and maximise the public use of historical documents in any format relating to people, businesses and institutions in the county, to indirect users.*

Dorset Record Office

Aim

To investigate what impact Dorset Archives and Museums services have on disabled people who living in Dorset in terms of how the services contribute to improving the quality of life by enabling them to develop in areas such as; lifelong learning skills and participation in the community or volunteering.

Objectives

To measure to what extent disabled people use or know about the services.

- If they use the services to find out what it is that is of benefit to them.
- If they don't to find out why it is that they are not using the services is there anything that is preventing them from using the services.
- To find out what we can do to raise awareness of our services with this section of the community.
- To find out what is the overlap, if there is any, between museum users and record office users and what they wish to use each for.

Devon Record Office

Aims:

- To contribute to Devon County Council/district councils social agenda, cultural strategies and lifelong learning plans
- To address exclusion caused by geographical dispersion in a large rural county
- To demonstrate the value of collaboration across the museum, archive and library sector in a local context
- To provide greater access to local records for all
- To enable host venues to add value to their own services
- To improve communication between the archives service and other domains
- To raise the profile of the archives service
- To reduce pressure in Record Office public search rooms
- To create opportunities for the deposit of local records

- Easy access to local knowledge and enthusiasm
- To give Record Office staff a specialist area of outreach work
- To reduce wear and tear on original records

Objectives:

To benefit users by providing:

- Easier access to information
- A regular point of contact
- Learning support
- Opportunities for informal discussion
- Opportunities to become involved in voluntary work
- An accessible gateway to written history
- Easy access to local knowledge and enthusiasm
- A more comprehensive service
- Learning support
- Enhanced community identity

To benefit host venues by providing:

- Additional resources at no cost
- Opportunities for additional publicity
- An added attraction
- Partnership
- Professional support
- Increased awareness and understanding of respective holdings
- Enhanced community access
- A more comprehensive service

To benefit the archives service by:

- Raising its profile
- Improving contacts and breaking down barriers
- Raising awareness and understanding of respective holdings
- Creating extra opportunities for securing deposit of local records
- Reducing pressure of use in its public search rooms
- Improving conservation of original records
- Engaging with local communities
- Demonstrating the value of the project/service
- Operating a cost-effective outreach activity

Bristol Libraries

(from the 2001-2004 Annual Plan)

1. Achieving Lifelong Learning
2. Strengthening local communities
3. Promoting Health and Well-being
4. Building a thriving community
5. Investing for a sustainable environment
6. Delivering value for money

Appendix 9 Sample Audit Questions

1. What does the presence of the (*Service or Project*) mean to you?
 - a. What do you know about the (*Service or Project*)?
[Question designed to get at experienced or perceived issues of role and use of service or project]

2. What is the value of the (*Service or Project*) to you? To the local community?
 - a. It has been said that the (*Service or Project*) can contribute to:
 - i. Regeneration and Thriving Economy
 - ii. Identity
 - iii. Inclusive community
 - iv. Learning
 - v. Health and Well-being

How strongly do you agree or disagree?
[Question designed to get at more specific experienced or perceived issues of quality and extent of service]

3. What most encourages, or discourages, you from using the (*Service or Project*)?
 What changes to the (*Service or Project*) would encourage you to use it more often?
 (Prompt if necessary regarding any problem with access or inclusiveness)
[Question designed to get at experienced or perceived issues of service management]

4. What would you as an individual or the community in general lose if the (*Service or Project*) no longer existed?
[An all-encompassing question designed to get at overall value and social impact]

5. Are there any other points or issues about the (*Service or Project*) that you would like to raise which have not been covered so far?
[An all-encompassing question designed to get at overall value and social impact]

Wording of Questions

1. **Wording should be open-ended.** Respondents should be able to choose their own terms when answering questions.
 2. **Questions should be as neutral as possible.** Avoid wording that might influence answers, e.g., evocative, judgmental wording.
 3. **Questions should be asked one at a time.**
 4. **Questions should be worded clearly.** This includes knowing any terms particular to the program or the respondents' culture.
 5. **Be careful asking "why" questions.** This type of question infers a cause-effect relationship that may not truly exist. These questions may also cause respondents to feel defensive, e.g., that they have to justify their response, which may inhibit their responses to this and future questions.
- (source: <http://www.mapnp.org/library/evaluatn/interview.htm>)

Appendix 10 Data Analysis Guidance

Preparing your Summary Report for the South West Social Impact Audit

Analysing the data from focus groups:

Read through your data and note any ideas or themes that emerge. Read and re read the data looking for themes and patterns. (You might find it helpful to code these in some way, for example by giving a discrete topic a number or letter)

Organise material from focus groups into “representative” themes

Compare data from the focus groups with the declared aims and objectives of the service or project. (e.g. as indicated in mission statements, written objectives and other documentation)

Extract representative quotes that illustrate the themes you have identified

Summarise how well the service or project were perceived to have achieved their objectives. Reflect on the reasons for matches and mismatches

Make a note of any factor that might have affected data collection (i.e. limited number of focus group participants, or too many staff not enough users, etc)

Note the demographic data about the group (Who was in attendance, if possible characterise the group’s make-up). How might this have affected the data?

Outline for summary report:

We recognize that the details will vary with the individual projects but the following outline can be adapted for individual use.

Introduction: Background to the project under discussion. Why this particular project was chosen for audit.

Methodology: Describe the methodology you used. Evaluate how the audit was conducted and the data obtained what worked and what did not.

Thematic analysis:

Write a section on each of the major themes as you identified them above. Under each heading compare and contrast views of respondents with those of the responsible organization, management, the literature etc. Include illustrative quotes (as above)

Possible themes may emerge especially from the value questions prompts for the focus groups:

Economic impact of the project/ service

Contribution of the service/ project to community image identity

Educational role
Inclusiveness of the community
Contribution to personal development, including recreation/health and well-being
Equity of service delivery
Building new relationships
Etc., etc, depending on individual project and the themes emerging

Management issues:

What do the data tell you about such things as staff attitudes, awareness of the service, organization of the service, how far staff, clients, and politicians understood the aims and objectives? How did management issues help or hinder the achievement of project objectives? Etc.

Conclusion:

Summary, identifying points of success/failure, strength/weakness for the service or project. Success/failure, strength/weakness of the social audit as a tool for your service. Recommendations. What happens next?

Appendix 11 Post-Audit Workshop Themes

South West Social Impact Audit Formative Seminar Taunton, Somerset 2002

Theme One: Publicity and Promotion—Being Told

Please consider the following questions:

- How does the community know about its cultural services?
- What are the some of the obstacles within the Services that need to be overcome in order to make patrons more aware of your resources?
- Who or what are the Service's competitors for public attention?
- How might partnerships work to expand awareness of the Service?
- How does the local mass media report on our Service?
- How can we encourage the Museum, Archive, or Library "habit"?
- Should services target special groups? If so, how can this be achieved?
- Are there any other questions or issues?

Here are some quotations to help you start thinking:

Raise the profile—I've forgotten about the library. I used to use it as a kid. Bristol Libraries

There is a wish to be playing a key role in society, to be 'at the heart of things' rather than an 'optional extra', to be seen to be relevant to communities and to people's lives and gain their support. There is also the need for political credibility, status and a higher profile within the local authority. (Museums and Social Inclusion: The GLLAM Report 2000)

We wanted to leave people wanting more, so we put it back in the public domain to create a sense of ownership Plymouth Naval Tradition Project

In a market-led institution the needs and preferences of the customer or user group will have considerable influence on exhibition policy. And even a museum which is not overtly responding to customer demands would nevertheless be prudent to take note of the visitors' views, lest it find itself without any. (Exhibitions in Museums Michael Belcher Smithsonian 1991)

First people have to be aware of the resource. If opportunities were made for people to find out more initially, that may spark an interest. Dorset Record Office

You encounter people in life whose whole approach and experiences are enriched by the people who can stimulate their interest and awareness... I was with a group of people ... in one of the libraries ... and there was this bloke who was amongst the team and he was drooling with joy at this great stack of atlases ... and he said 'I just love looking at all these maps and the charting and all that.' And by placing these opportunities in front of people - otherwise life can be a very dull round of people working themselves to death just to feed their families with no breadth of experience to their lives. So I think that libraries are very important here.

(Elected member, Somerset, quoted in *New Measures for New Libraries*, 1998)

The term market signifies competition. Museums in all parts of the world are in competition, not simply with one another, but with all the calls on people's leisure time. Operating within a market means being competitive, providing products and services, which the public want and are prepared to pay for either directly or through taxes. Successful museums are oriented towards the market and are outward-looking. They recognise that their future depends on people sympathetic to their objectives and on people who are prepared to be involved in what they have to offer...Building public interest and support is essential for long-term success.

(*Museum Basics* Timothy Ambrose and Crispin Paine, Routledge 1993)

And what about sort of complementing what we see on television, because what struck me when I went to the wildlife photography exhibition was, it was a huge audience of these programmes on television, and this is like seeing still frames from the David Attenborough thing. Which most people watch, I don't know. Bristol City Museum and Art Gallery

Many respondents felt that the key to solving the low profile of archives in the public consciousness was to start by contributing more pro-actively where archives are used by the mass media. (Taking Part: An Audit of Social Inclusion Work in Archives, National Council on Archives 2001)

It's a missed opportunity if it hasn't raised awareness of the work of museums and libraries... Plymouth Naval Tradition Project

So each and every museum should define its role, and this done, consider how it might go about attaining its aims and objectives. Additionally a museum should stipulate its primary services (including its communications function) and consider both secondary and supporting services, which may be deemed necessary or desirable in the context of providing a service to the public. A further consideration will be the economic viability of such proposals. (Exhibitions in Museums Michael Belcher Smithsonian 1991)

There is an urgent need to raise the profile and awareness of archives both to the public and amongst the other kinds of service provider at local regional and national level...Raising of profile and awareness is a necessary pre-cursor to meeting the challenge outlined by the Department of Culture Media and Sport's (DCMS) best practice policy framework. (Taking Part: An Audit of Social Inclusion Work in Archives, National Council on Archives 2001)

You need more advertising. I only find out about things after they've already happened Bristol Libraries

Terms of reference: To promote the effective preservation of the archives within the South West of the England and to foster access to the archives particularly for the purposes of research and education. (South West Regional Archive Strategy: Developing the Regions Archives 2001-2004)

Theme Two: Recreational Use—Comfort, Ease, and Access

Please consider the following questions:

- Do we consider Museums, Archives and Libraries to mainly be a recreational resource?
- Does the public's perception of cultural services as a recreational resource change how services are provided?
- What priority should policy-makers and service providers place on recreational resources?
- How much difference does the building make?
- How can we make our services more than just a "day-out"?
- What is the competition?
- What place does the phrase, "giving the customer what they want," have in museums, archives, and libraries?
- Any other questions or issues?

Here are some quotations to help you start thinking:

For the DCMS, social inclusion work should: "promote the involvement in culture and leisure activities of those at risk of social disadvantage or marginalisation, particularly by virtue of the area they live in; their disability, poverty, age racial or ethnic origin." (Arts and Sport; Policy Action Team 10 A Report to the Social Exclusion Unit, DCMS 1999, quoted in, Museums and Social Inclusion: The GLLAM Report 2000)

I am a disabled person and I cannot, without a very lot of pain quickly, stroll. I can walk anywhere, but pottering around museums is absolutely deadly for me. I have to sit down very regularly. You try to find somewhere to sit in a bloody museum.
Bristol City Museum and Art Gallery

'...in generating social change by engaging with and empowering people to determine their place in the world, educate themselves to achieve their own

potential, play a full part in society and contribute to reforming it in the future'
(DCMS, 2000, Quoted in Re:Source Markets and Users 2001)

But what I wanted to say was the reason middle class people make the decision, is because generally speaking you have got to have the time and the money to be able to organise and provide these things. The people who – just for purposes we will call the working classes – Are generally not well off enough to be able to go abroad to visit places that are beautiful, or are interesting. So like it or not they are bloody stuck where they are. It's not their fault and they are not making the decision. The decision is being made economically for them. So it's up to the rest of the people to give them the opportunity to see something else. Bristol City Museum and Art Gallery

Social inclusion is not just another 'service' museums offer. It is about transforming traditional concepts of museum-community relationships; it is about involving communities and empowering them to transform the museum. This requires involving the community early on during the process and jointly establishing project expectations and objectives. (Museums and Social Inclusion: The GLLAM Report 2000)

Libraries seem to be a bit washed up and not impressive...they are more and more tatty, less and less appealing. Not as appealing as they used to be. I think they're being phased out. Bristol Libraries

The Museums Association's ethical guidelines on access established the principle that 'museums belong to everybody':

Museums have a duty to provide access today. Unlike other cultural organisations, they equally have a duty to safeguard for future generations their collections and other resources, including information and expertise (Museums Association Ethics Committee, 1999).

But, in practical terms, there is little to help museums identify or meet users' needs or show how such needs might be used strategically be used as the lynch-pin for all museum activities. Rand (1996) proposes a 'visitors' bill of rights' and outlines a model, which simultaneously codifies visitors' needs, lobbies for respect for visitors, and sets standards for museums staff. Little of what she suggests is undiscovered by visitor studies, but she highlights the gap between the acquisition of such knowledge and its application, indeed its failure to influence the delivery of museum services and programming. (Quoted in Re:Source Markets and Users 2001)

The library is at the bottom of the shopping list...if the Council's attitudes towards the libraries was changed from being a chore...let's get our library service out and make it a proud part of our heritage for hundreds of years...Bristol Libraries

...Museums can never compete on equal terms with theme parks and other organisation purely devoted to entertainment, because we have the added responsibility of caring for the national collections, carrying out research and providing access to the public...(Exhibitions in Museums Michael Belcher Smithsonian 1991)

...quality of life and learning are all encompassing things...and run through the whole system... Devon Record Office

Museums and galleries (henceforth 'museums') are amongst the UK's most popular attractions. Over 77 million visits are made to museums per year (Sightseeing Research, 2000:22) – more than any other category of visitor attraction as defined by the national tourist boards. Museums are a major draw for overseas visitors, with a third being motivated to visit the country because of its museums. Nearly a third of adults resident in the UK claim to have visited a museum or gallery in the past year (MORI, 2001: 5). Museums also represent a focus for their local communities. Almost two thirds of museums involve volunteers - between 19,000 and 25,000 volunteers were active in 1999 (Sightseeing Research, 2000:47; Selwood, 2001a) and over half UK museums are supported by Friends organisations, of which there are some 730 (Carter et al, 1999:18) with an estimated total of around half a million members¹.

'...in generating social change by engaging with and empowering people to determine their place in the world, educate themselves to achieve their own potential, play a full part in society and contribute to reforming it in the future' (DCMS, 2000, Quoted in Re:Source Markets and Users 2001)

It brings tourists into the area that come and visit. Cheltenham Art Gallery and Museum

My main point has been to suggest that, apart from "work," the activity of using the world to satisfy human wants, mankind has devised or stumbled upon other activities and attitudes towards the world, the activities I have grouped together as "play." It is in these activities that human beings have believed themselves to enjoy a freedom and an illumination that the satisfaction of wants can never supply. It is not Homo sapiens and Homo laborans, the clever users of the resources of the world, but Homo ludens, the one engaged in the activities of "play," who is the civilized one. (Michael Oakshott, First Things 1995)

It gets you out... Dorset Record Office

In these days when the satisfaction of human wants is taken to be the only important activity, those who devise our systems of education are apt to find a place for all that I have called "play" only if they can regard it as "work" of another sort. (Michael Oakshott, First Things 1995)

...libraries as a vehicle to enable a better interchange of ideas, and an ongoing representation of our culture. And in that respect I don't see a distinction between the services that the library provides and the museums service provides, the theatre provides.

(Elected member, Newcastle quoted in New Measures for New Libraries, 1998)

In terms of visitor satisfaction with the services and facilities available in the region's repositories, no detailed information is available for the South West as a whole. (South West Regional Archive Strategy: Developing the Regions Archives 2001-2004)

All museums should have access to centralised or regionally co-ordinated programme of quality marketing and business management training (Middleton, 1998:78-80). Museum staff need help to segment their market sensibly and develop parallel strategies to appeal to different sectors. It is unhelpful to burden them with the goal of blanket popular access. (Quoted in Re:Source Markets and Users 2001)

I have never seen anything advertised for the museum Bristol City Museum and Art Gallery

For some non-users, the image of the library as “not for them” was a very powerful one. Their perception of library rules and culture - usually based on past, not recent experience - was a negative one, for instance in terms of the attitude of staff and concern about fines and, among parents, having to pay for books lost or damaged by children (New Measures for New Libraries 1998)

It is intimidating of people with mental disabilities. At the end of the day it is not marketed on – I don't like the term of grass roots – but it's not marketed on a grass root level. So at the end of the day most people are going to say 'what's it all about mate'. Bristol City Museum and Art Gallery

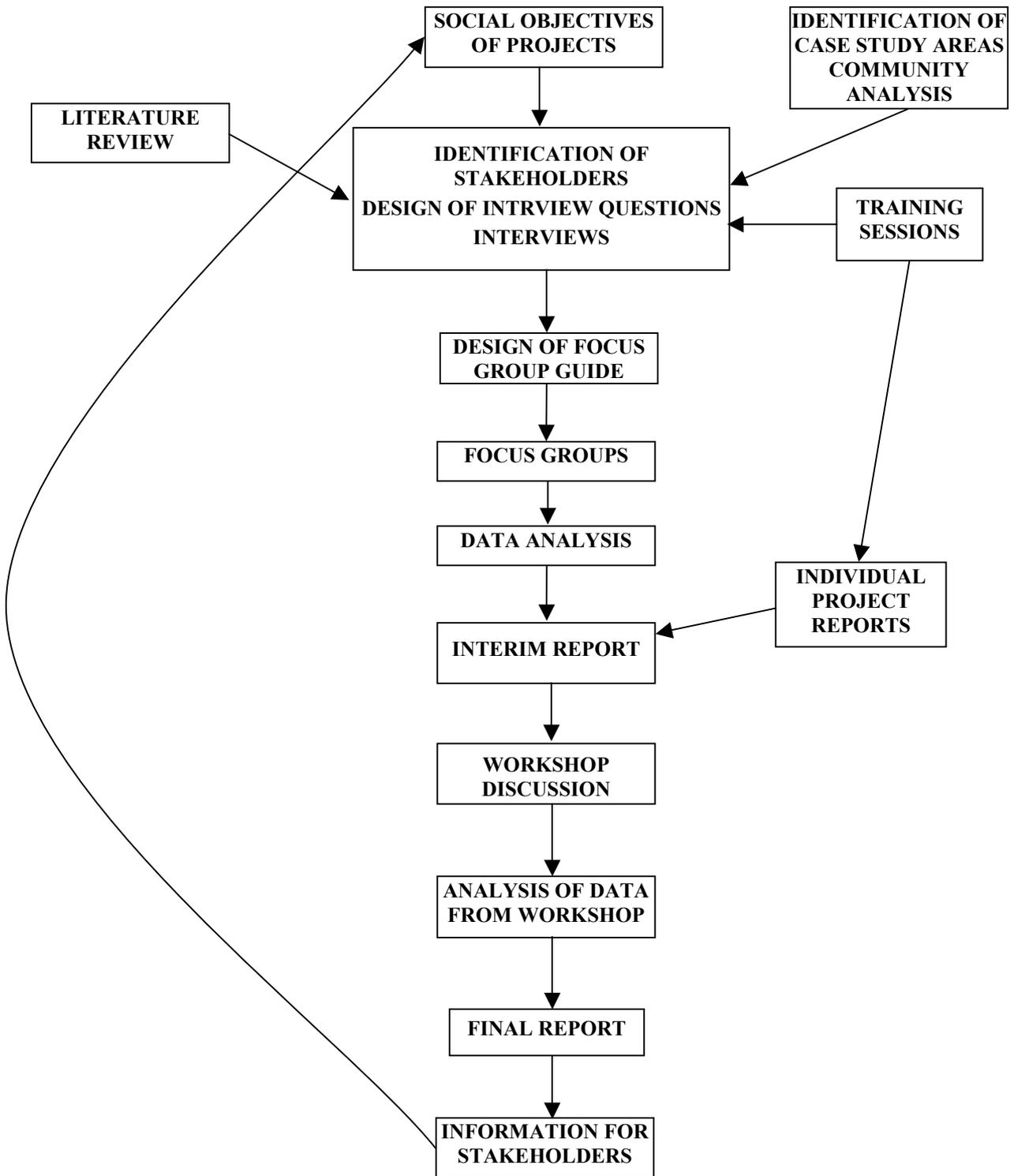
The manner in which a museum determines and controls the interface with the public will result in the creation of the museum's image. And this should not be a haphazard occurrence, but should emanate from the purposeful implementation of the museum's communication policy, via its communication strategy through the communications plans. (Exhibitions in Museums Michael Belcher Smithsonian 1991)

Sometimes you get confused, you know what you want but you don't know how to get it. It needs to be more like the shops—"Can I help You?" Bristol Libraries

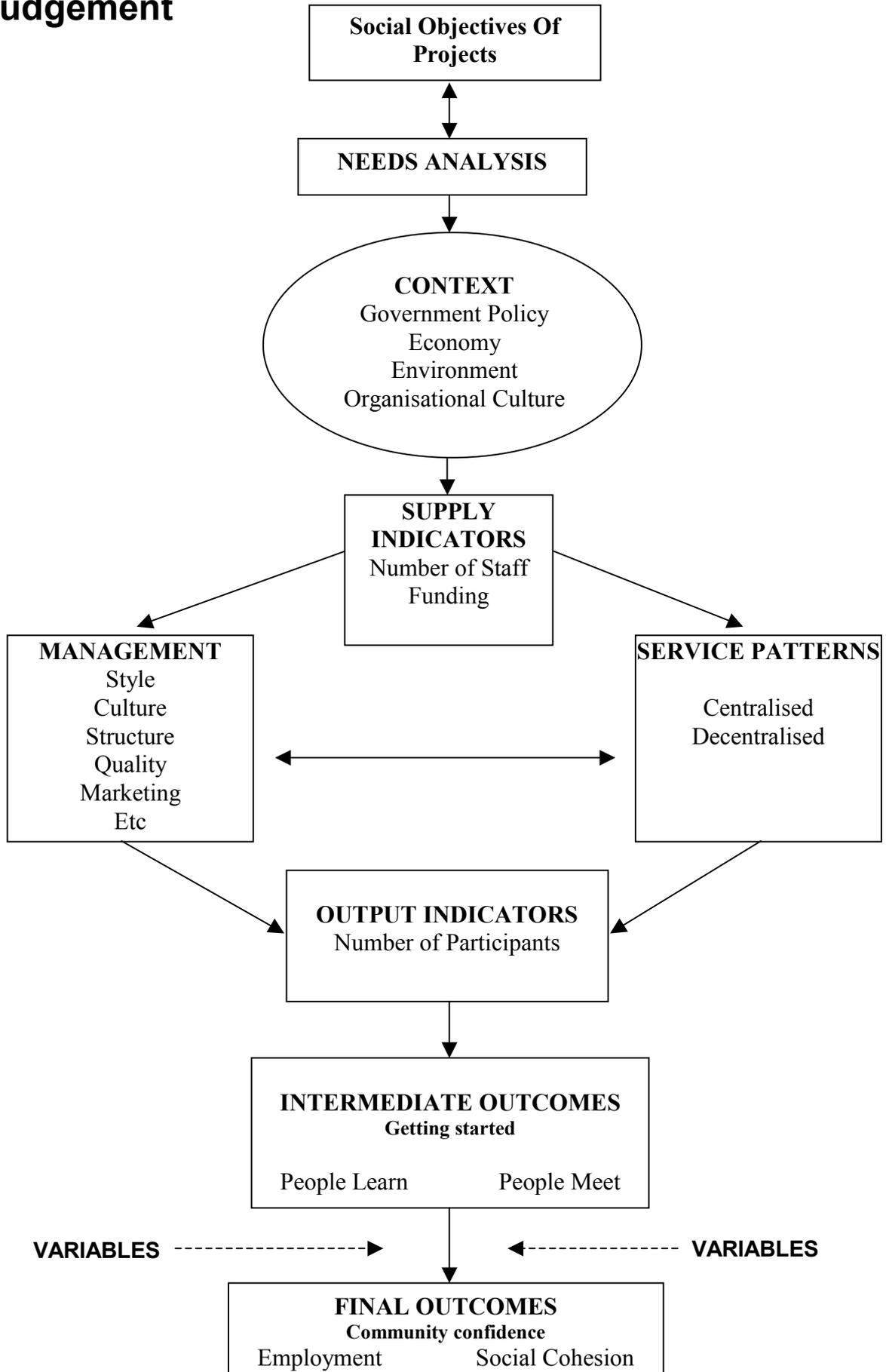
Appendix 12 Audit Participant Questionnaire

1. Please describe how you came to participate in the South West Social Impact Audit, and your initial reaction to assessing your service or project's social impact.
2. Please describe the value of the training workshops for this Audit for you and your service.
3. As you participated in the audit process, what did you find the most useful?
4. What did you find to be the least useful?
5. If you undertake the audit process in your own organisation again what would you like to do differently?
6. The audit was designed to allow independent, cross-domain collaboration in the assessment phase. How did auditing another authority and another type of service benefit you?
7. What would make you use this methodology again?
8. If there are further issues that you would like to include in an evaluation of this project please add them.

Appendix 13 Overview Of The Social Impact audit



Appendix 14 Framework For Informed Value Judgement



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