



# A REVIEW OF THE ROBERT O'HARA BURKE MUSEUM

## Report and Recommendations

[Version 1.3 4 May 2009]

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## **CONSIDER THIS ABOVE ALL ELSE**

*Museums enrich communities. Through their collections, exhibitions and other public programs they document how, why and where communities began, what happened to them along the way, how people rich and poor from all cultural groups lived, and how the life of each community fits into the larger picture. They transmit community cultural values to younger generations and contribute towards a sense of community identity. They help us understand who we are and where we are going.*

*Profit is not the main reason a museum exists, nonetheless museums need to generate some of their own funds in various ways.*

*Museums are almost always capable of increasing income for other organisations, but their primary purpose must always be to strengthen community identity and sense of place.*

***Those responsible for museum operations need to be very aware of the value and importance of a museum to its community – values which extend far beyond any immediate money which may be earned on-site.***

## **ABOUT THIS REPORT**

### **What is the report for?**

The report is intended to be a working tool. The decisions reached using it will be owned by the Indigo Shire Council, the Robert O'Hara Burke Museum and ultimately the community.

This report is intended to assist the Indigo Shire Council management and staff with decision making by:

- raising awareness of some important museum principles
- identifying issues and options and recommending priorities;
- suggesting workable solutions best suited to meet the community's needs and those of its collections

The report needs to be circulated, discussed and acted upon.

### **What is the report about?**

The report presents the outcomes of a review of Robert O'Hara Burke Museum undertaken on behalf of the Indigo Shire Council from January to March 2009.

The report identifies key principles to be considered in decision making about the Robert O'Hara Burke Museum. It identifies a number of options and recommendations for Indigo Shire Council to consider and suggests steps to be taken in advancing strategic priorities.

While a number of recommendations are of a technical nature, others concern community issues which need to be discussed more broadly to ensure their support and implementation.

### **How is the report organised?**

The report has been structured with four parts:-

- The Executive Summary brings together upfront the key findings and strategic recommendations that need to be considered by decisionmakers
- The main body of the report expands upon issues and places the principles, findings and recommendations within their context.
- The action plan outlines steps which could be followed to implement recommendations made in the report.
- The Appendices provide further information to assist those who will be charged with implementing the report's recommendations

The Key Findings and Strategic Recommendations which appear in the Executive Summary are also highlighted in grey in the body of this report in the context to which they relate.

The Consultant Team have committed to be available for advice and to answer any queries regarding the report and recommendations arising from the review.

### **Disclaimer**

As with any project of this nature and scale, circumstances will necessarily change over time. To the extent that it is practical, we have attempted to ensure that this report is sufficiently flexible to accommodate a range of management and operational models. Circumstances, however, may arise which could not have been anticipated at this stage, and which may ultimately have a bearing on the validity of the findings and recommendations of this report.

Several previous reports, plans, publications and consultations have informed this report. A full list of these is provided at Appendix 3. We have taken the listed background material in good faith, and have cited specific sources as appropriate throughout the document. While every effort has been made to ensure that we have based our report on the most up-to-date information, the consultant team cannot accept any liability for errors or omissions arising from either the background source material, or from unforeseen changes to the development policies and programs for the Burke Museum or Historic Precinct.

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## PART I EXECUTIVE SUMMARY

### ***Key Findings***

The review found first and foremost that:

- The Robert O'Hara Burke Museum is probably unique in Australia as a provincial museum with collections covering important aspects of Victorian and Australian cultural and natural history over a continuous period of 150 years.
- The Museum and its collections are of national significance. Its 19th century ethnographic and natural science collections and displays are particularly significant.
- The Museum is greatly valued by the community and is viewed as important to the State by a number of Victorian Government agencies.
- The Museum also contributes value to the community but in ways which are not widely recognised and which need to be identified and monitored.

As important as the museum is to the community, it is no longer operating as effectively as it should be and is failing to achieve what is expected of it by the community.

- Three elements are essential for successful governance and management: policies and plans; information on performance; accountability and decision-making. The Museum and the management structure in which it currently operates are deficient in all three of these areas.
- The positioning and management structure for the Museum is inappropriate to the scope of its roles of which providing a tourism attraction is but one element.
- Due to budget and staff cuts to the Tourism portfolio the Museum no longer has the critical mass in terms of expertise and resources invested that is required to enable and sustain operations at a level it is reasonable to expect.
- Unless these matters are addressed the Robert O'Hara Burke Museum may risk losing accreditation under the M.A.P. program operated in Victoria and will not be in a position to meet the National Standards for Australian Museums and Galleries.

### ***Strategic Recommendations***

The recommendations made in this report are timely, coming as they do at a stage when the Indigo Shire Council is restructuring its management and operations frameworks.

It is recommended that:

## **1. Governance**

### **1.1. Establishment of Museum Management Advisory Committee**

- A Management Advisory Committee (under section 86 of the Local Government Act 1989) be established by a resolution of Council to provide oversight of Robert O’Hara Burke Museum and its operations.**

### **1.2. Positioning**

- The Organisational Structure of the Robert O’Hara Burke Museum be revised to place the museum in the new portfolio of Sustainable Communities.**

### **1.3. Integration**

- The operations of the Historic Precinct be integrated into the Robert O’Hara Burke Museum.**

### **1.4. Adoption of Statements of Purpose and Policy Framework**

- Statements of purpose for the Robert O’Hara Burke Museum and the Beechworth Heritage Precinct be reviewed with a view to the possibility of a common purpose being defined and their management as a single ongoing entity being considered for development and adoption.<sup>1</sup>**

### **1.5 Policy Framework**

- A policy framework consistent with the Robert O’Hara Burke Museum’s purposes be considered by the Museum Management Advisory Committee. The revised policy framework and museum policy statements would then be recommended for adoption by Council and flagged for review at an agreed date.**

## **2. Organisation**

### **Revision of Organisation Structure**

#### **2.1. Management**

- A professionally qualified and experienced Manager Museum and Heritage Services position be established to report directly to the General Manager Sustainable Communities and to oversee staff of the Robert O’Hara Burke Museum and Historic Precinct.**

#### **2.2. Professional Staff**

- The positions of Curator, Education and Programs Officer and Archivist be re-established with responsibility respectively for collections management, education and evaluation, and supervision of access to the archives.**

### 2.3. Staff deployment and training

- A new staff structure, including additional skill sets, is essential for the Museum to operate in a sustainable way and for Council to ensure that it is meeting its collection management responsibilities.

### 2.4 Relationship with External Bodies – *Friends of the Burke Museum*:

- The Manager, Museum & Heritage Services lead a process of consultation with the Friends of the Burke Museum to negotiate appropriate roles and contributions the Friends will have in future in relation to the Museum.

## 3. Planning and Planning Processes

### 3.1. Interim Strategic Plan

- Council consider the action plan provide by the consultants as a means of establishing a planning framework for museum and heritage services.
- An Interim Strategic Plan be developed and approved as an initial step.

### 3.2. Strategic and Operational Planning

- The Manager Museum and Heritage Services lead revision of the Interim Strategic Plan and development of a series of Operational Plans for consideration by the Museum Management Advisory Committee. These plans would then be recommended to Council for inclusion in the Indigo Shire Council Corporate Plan and implementation.

### 3.3. Interpretation Plan

- Current means of interpretation at the Museum be reviewed and an Interpretation Plan be developed as soon as possible...

### 3.4 Contemporary Approaches to Exhibition Planning in the 21st Century

- The “Street of Shops” exhibition be removed.

## 4. Information collection

### 4.1. Visitor research

- In 2009/10 the Manager Museum and Heritage Services lead development and execution of a regular program of research on visitors, actual and potential, to inform program development and marketing and to lay the basis for evaluation.

### 4.2. Evaluation and performance measurement

- The Manager, Museum and Heritage Services, as soon as practicable, develop and institute an adequate program of regular performance measurement and periodic evaluation of the most critical components of the Museum’s work. These processes should be capable of indicating the contribution of the museum to the community and its sustainability, and monitoring progress in achieving operational objectives and advancing strategic goals.

## **5. Standards and benchmarks**

### **5.1. National Standards and Benchmarks**

- The Museum Management Advisory Committee consider the National Standards for Australian Museums and Galleries with a view to:**
  - **recommending the Australian National Standards for Museums and Galleries to Council for adoption as targets to aim for;**
  - **recommending the ICOM Code of Ethics to Council for adoption**
  - **committing to ongoing participation of the Museum in the Museum Accreditation Program operated by Museums Australia (Victoria) as a means of progressing achievement of the national standards.**

### **5.2. Other standards**

- As national standards for archival collections do not at present exist, the Museum Management Advisory Committee consider developing and adopting suitable policies and standards for archive collections for which the Robert O'Hara Burke Museum is responsible.**

### **5.3. Cultural Protocols and Access**

- That the Manager, Museum & Heritage Services approach Museum Victoria for advice on the appropriate management of its Indigenous and ethnographic collections.**

## **6. Collection Management**

### **6.1. Recognition of collection's main strength**

- Strategic plans and priorities recognize the 19th century collections as the most significant - nationally significant – component of the Robert O'Hara Burke Museum's collections.**

### **6.2. Collections storage**

- The Indigo Shire develop a suitable repository for the collections held in both the Robert O'Hara Burke Museum and the Historic Precinct.**

### **6.3. Copyright**

- Ensure that copyright issues surrounding items in the collection, or acquisitions, are formally resolved.**

### **6.4. Assessment of Significance**

- The collections policy include statements to the effect that the Museum will incorporate assessment of significance of the item into its acquisition criteria.**

## **7. Interpretation and Learning**

### **7.1. Visitor needs and Learning Styles**

- The Marketing Plan be revised to more effectively target selected groups and locations.**

## **8. Marketing and Promotion**

### **8.1. 8.1 Targeting**

- The Marketing Plan be revised to more effectively target selected groups and locations**

### **8.2. 8.2 Signage and Way-finding**

- Signage and way-finding to the Burke Museum be installed, near the entrance to the town on Bridge Street, and outside the VIC**

## **9. Access to Museum Services**

### **9.1. 9.1 Floor Configuration**

- That the Museum's floor configuration be changed in order to accommodate a single area for providing the public with access to its archives, under supervision.**

### **9.2. 9.2 Handling Research Inquiries in-house**

- That the Museum handle research enquiries in-house as far as possible, only engaging an outside consultant when other work pressures make it essential to do so.**

## **Further Information about the Report's Recommendations**

The Strategic recommendations appear in this section of the Executive Summary to flag them for key decisionmakers.

Those who read further will see that the key findings, strategic recommendations and other recommendations are also highlighted and expanded on in the body of the report where they are explained in the context to which they relate.

Those who need to reach important decisions about museums also need to be aware of some key principles (see APPENDIX IV SOME ESSENTIALS FOR CONTROLLING COLLECTIONS page 61).

## **Implementing the Report's Recommendations**

The Consultant Team recognises that implementing changes will need to take place over time.

A basic action plan is set out in PART IV IMPLEMENTING THE RECOMMENDATIONS (see page 38). Further information to assist implementation of recommendations is available in the Appendices (see page 46 onwards).

## **PART II INTRODUCTION AND METHODOLOGY**

### ***Introduction***

#### **Background to this report**

The Robert O'Hara Burke Museum has developed organically since it was established in Beechworth in the 19<sup>th</sup> century as one of Australia's first museums. It was first established as an athenaeum and library in 1857. Before long it underwent the first of many changes when in 1863 the complex was extended and re-named the Robert O'Hara Burke Memorial Museum. All this happened at a time when a number of State museums were yet to be conceived.

For many years the Burke Museum has been managed by Indigo Shire Council. For a time it had a management committee but in recent years this committee lapsed.

In addition to management and primary funding from the Council, Burke Museum has enjoyed support from the Friends of the Burke Museum, a community based and incorporated not for profit body.

In the 21<sup>st</sup> century museums cannot be expected to survive unless they are valued by the communities they serve and are able to meet the expectations their communities have of them.

Recognising there was a need for changes Council commissioned a number of studies over the past decade in an endeavour to plan and achieve development of the Museum. These papers and others are listed in APPENDIX III PREVIOUS REPORTS & STUDIES page 57.

The absence of museological expertise at a management level emerged as an issue and has been commented on both within and beyond Beechworth on a number of occasions since 2007.

Throughout the more than 150 years of its existence the Museum has developed "organically" and undergone changes. During the last century and a half the way museums operate and the expectations of them have changed markedly and it is once again a time to embrace changes to make the Museum stronger.

#### **Project Brief - Goals and Objectives of the Museum Review**

The invitation for expressions of interest circulated in June 2008 called for a review of the operation of Beechworth's Robert O'Hara Burke Museum including a review of the services provided, the organisational structure and staffing requirements, the vision and working action plans, and the fees and charges. The project needed to take into account Indigo Shire Council's financial limitations, responsibility as custodians of the collection, relationship with the wider community and priority for quality heritage tourism experiences.

The objectives of the project were identified as follows

- List the services of the Burke Museum, recommending those which are essential, those that are desirable but not essential, and those that are not desirable.
- Within Council's financial limitations, propose an organisational structure to best provide the services essential and, where possible, desirable. The organisational structure should include where the Museum should sit within

Council's structure, and detail positions required with skill sets and a recommendation of how many hours each position would be required per week.

- Make a recommendation on operating days and hours.
- Review the currency and appropriateness of the Burke Museum's vision and mission.
- Review the currency and appropriateness Burke Museum action plans.
- Review the Museum's fees and charges.

### ***Methodology***

The ROBM Review project was carried out in three phases entailing off-site preparation, onsite fieldwork and follow-up work entailing analysis of findings and preparation of reports and handbooks.

Details of the methodology are set out in APPENDIX I PROJECT BRIEF AND METHODOLOGY page 47.

### ***Acknowledgements***

The Consultants are grateful to Indigo Shire Council for its active commitment to this project from start through to completion. We thank Mayor Peter Graham and Councillors Vic Issells and Ali Pockley for making the time to discuss the project with us. In particular, we appreciate the support we received from Terry Chubb who responded to all our requests courteously and promptly.

We thank colleagues elsewhere in Victoria for the assistance they provided us: Laura Miles and Kitty Owens from Museums Australia (Victoria), Martin Hallett (Arts Victoria), Amanda Bacon (Heritage Victoria), Robyn Till (Macedon Ranges Shire), Maggi Solly (Yarra Ranges Shire) and Chris Dormer (former Arts Officer, Indigo Shire).

A number of staff from Indigo Shire, including staff from the Burke Museum and the Historic Precinct, made the time to see us and in some instances prepared well-considered written submissions. We thank them for freely offering us their time and ideas.

## **PART III FINDINGS AND RECOMMENDATIONS**

This part of the report identifies museum necessities, sets out the findings that emerged during the project, flags key issues and explains the recommendations developed to address them.

### ***What is a Museum?***

For many general visitors who come through the doors of a museum perhaps only several times during their lives (and even for those who are more regular visitors) a museum is a place to go. They remain unaware of what happens behind the scenes which makes services available for visitors nor are most aware of other services museums provide.

Successful museums are organisations that have a number of roles they are active in. A museum cannot be successful just by providing a venue. This is exemplified by the definition of a museum cited in *National Standards for Australian Museums and Galleries* which describes a museum as an institution with the following characteristics:

*A museum helps people understand the world by using objects and ideas to interpret the past and present and explore the future. A museum preserves and researches collections, and makes objects and information accessible in actual and virtual environments. Museums are established in the public interest as permanent, not-for-profit organisations that contribute long-term value to communities.<sup>1</sup>*

While profit is not the main reason a museum exists, it is nonetheless recognised that museums need to generate some of their own funds in various ways. The challenge in most cases is to do so without compromising a museum's prime purpose and its capacity to contribute long-term value to the community in so many other ways.

In contrast to museums, private collections are managed for the enjoyment of their owners and may be used in an effort to make a profit or even market a product. History has shown that private collections generally have a finite life and few make a profit. In the longer term most are eventually either dispersed and sold or bequeathed to a museum.

Unlike private collections true museums need to be operated on behalf of the community they serve and central to this is their need to be permanent.

### ***How are Museums Important for their communities?***

It is pointless considering the cost of Robert O'Hara Burke museum without understanding its value to the community it is there to serve.

It has long been known that museums contribute to local economies. This is not just from money that passes through their tills and by contributing to local employment. Studies in Australia and overseas on economic impact indicate museums can contribute to more money passing through the tills of local businesses than from sales and entry fees received at the museums themselves.

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<sup>1</sup> See Appendix A of *National Standards for Australian Museums and Galleries* available for download from: [http://www.collectionsaustralia.net/includes/get\\_file.inc.php?i\\_d=471](http://www.collectionsaustralia.net/includes/get_file.inc.php?i_d=471) as well as from Museums Australia website: <http://www.museumsaustralia.org.au/site/page13.php>

On a return on investment basis alone the economic impact of museums alone often justifies a community's investment in them. However, there is an increasing body of work to indicate that museums also contribute value to their communities in many other ways<sup>2</sup>. Projects have been carried out elsewhere in Australia to identify the impact of museums including some work in regional communities<sup>3</sup>.

### ***Finding out how Robert O'Hara Burke Museum is important for the communities it serves***

It was beyond the brief of this project to undertake an evaluation of the precise ways that the Robert O'Hara Burke Museum contributes to the community of Beechworth and surrounds. However, from the evidence of work undertaken in similar communities elsewhere, there is every reason to believe that the Robert O'Hara Burke Museum has economic, social and cultural impacts which contribute to the Mission of Indigo Shire Council:

***“To serve the community through responsible leadership, sound financial management and community partnership and to achieve sustainable economic, environmental, social and cultural outcomes for the well being of all people in our Shire.”***

An example of just how communities elsewhere use their museums to increase such outcomes can be found in Swan Hill. The Swan Hill Rural City Council has identified the proposed redevelopment of the Swan Hill Pioneer Settlement as its highest priority. It has done this because of the Museum's dynamic educational and cultural programs which are helping to inform and shape regional community identity and pride as well as providing significant economic benefits to Swan Hill and the region as a visitor attraction.<sup>4</sup>

The State of Victoria has a priority to build sustainable communities. Both Arts Victoria and the Victorian Department of Planning and Community Development have a shared agenda focusing on cultural and community strengthening – particularly in regional and rural communities.

The Cultural Heritage Precinct project undertaken in 2001 drew heavily on outside expertise to develop a heritage tourism product. However, lacking a core of local professional heritage management expertise, that product is perishable and finite. Eight years down the track from its launch the Beechworth Heritage Precinct project is now in need of refreshing and updating.

In contrast to the other heritage venues, at the heart of the precinct area is the Robert O'Hara Burke Museum with collections that hold a wealth of stories and other social and cultural resources that can continue to be drawn on forever if it is properly managed and resourced.

When decisions were made in 2007 to cut budgets and staff, solid data was not available to indicate just how valuable the Robert O'Hara Burke Museum is to Beechworth and surrounding communities and it is still not to hand.

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<sup>2</sup> See Scott, C (2004) museums and impact: Some issues for museums to consider: [http://www.fuel4arts.com/files/attach/MuseumsAndImpact2\\_Scott\\_160904.pdf](http://www.fuel4arts.com/files/attach/MuseumsAndImpact2_Scott_160904.pdf)

<sup>3</sup> See: Kelly, L (2006) Measuring the impacts of museums on their communities: The role of the 21<sup>st</sup> century museum. <http://www.intercom.museum/documents/1-2Kelly.pdf>

<sup>4</sup> See: Hearings of the Victorian Parliament's Rural and Regional Committee, Swan Hill, August 2007. <http://www.parliament.vic.gov.au/rrc/inquiries/tourism/PDF%20for%20web/1Augw4.pdf>

Such data will further support Indigo Shire Council and its Sustainable Communities team in their endeavours to attract further state government investment and in so doing advance Council's Mission, Vision and Goals<sup>5</sup>.

### ***How are Museums Managed?***

Managing museums is all about balancing competing needs:-

*Museums are complex multi-dimensional institutions. On the one hand they are concerned with collection management, conservation, research and scholarship. They are also concerned with interpretation, exhibition, communication and enjoyment.*

*Both dimensions are interdependent but are subject to shifts of balance. There is no formula to determine the "correct" mix or balance of functions which specifically relate to the care and management of collections as opposed to the delivery of exhibition and other communication programs<sup>6</sup>.*

The successful management of museums focuses on getting the right balance and ensuring that the museum is permanent and of value to the community it serves – all of which depend upon sound governance and professional expertise. Clearly this cannot be achieved by wholesale outsourcing or privatisation.

## **.1 Governance**

### **Governing Body**

At present also there is no body with oversight of the Burke Museum; this is not a role for the Friends of the Burke Museum. A Museum Management Advisory Committee needs to be established to provide strategic direction. It should be a policymaking, not an executive body – this latter function is the province of the Museum's professional staff. The Committee should be drawn from different sectors of the community with representatives from business, heritage agencies, environmentalists, educationalists and the like, and chaired by a Councillor.

The Committee would be established under section 86 of the Local Government Act (1989) by resolution of Council.

### **RECOMMENDATION 1.1:**

**That a Museum Management Advisory Committee (under section 86 of the Local Government Act 1989) be established by a resolution of Council to provide oversight of the Robert O'Hara Burke Museum and its operations.**

### **Positioning**

At present the Burke Museum is located within the Tourism & Marketing portfolio. While there are certainly areas of overlap between museums and tourism, essentially they are different. Museums are cultural institutions which, if properly

<sup>5</sup> For a handbook on how to start developing an impact measurement program. See: Mercer, C (2004) *Museum Impact Assessment – a practical guide*. This is available as a free download from: <http://www.collectionslink.org.uk/assets/userfiles/index.php?file=000115.pdf>

<sup>6</sup> Department of the Arts, Sport, the Environment, Tourism and Territories (1990). *What Value Heritage? A perspective on the Museums Review and the performance of museums*. Canberra, Australian Government Publishing Service.

managed, will last in perpetuity. This is not the case with tourist attractions – festivals and events, caravan parks etc. where the primary purpose is to create a market in order to build turnover. While it is useful to view museums as part of a community's tourism infrastructure, their prime purpose is not to attract tourists, but to serve as an enduring community resource, preserving that community's history and identity.

For these reasons and also, given the current emphasis in both Arts Victoria and the Victorian Department of Planning and Community Development on cultural and community strengthening through the Victorian Government on Sustainable Communities, we believe that the administration of both the Burke Museum and the Historic Precinct should be placed within Indigo Shire Council's new portfolio of Sustainable Communities.

#### **RECOMMENDATION 1.2:**

- The organisational structure of the Robert O'Hara Burke Museum should be revised to place the museum in the new portfolio of Sustainable Communities.**

#### **Integration**

The Historic Precinct, developed in 2001 as a heritage tourism product, forms an obvious link with the Burke Museum. It is nearby geographically; it serves essentially the same purpose and is likely to attract the same groups of visitors and users. However, it presently lacks professional heritage site management expertise on staff.

In effect, the Precinct takes the form of an eco-museum, or museum without walls, in which an entire village or streetscape is preserved for heritage and cultural reasons, and becomes a visitor attraction in its own right. At Beechworth, the buildings have the added advantage of being open to the public, mainly with historical displays, so that they can be inspected inside and out. But for the most part they are not fully-fledged museums; rather, they are venues with exhibitions using museum objects. Of course the Courthouse holds a significant collection of law library books in its own right.

*The Historic Precinct, isn't working.* Our observation during our short stay at Beechworth was that there is little sign of activity in the northern end of the town. Visitor numbers data confirms that only a small percentage of visitors to Beechworth take advantage of what should be a major source of local community identity and pride.

The reason for this is that from the street there is little to draw the visitors to the precinct, other than the facades of the historic buildings themselves. Furthermore, the product offering needs to be improved before this situation can change. There should be activities in the park outside – maybe stalls and a café. Inside the buildings there should be thought-provoking and imaginative exhibitions. Of the displays we viewed, only those in the Courthouse would have met the National Standards for museums. It is likely – although we could not confirm this – that collection management standards would similarly fall short.

Later in this report we suggest that a desirable early objective in planning for the Precinct as a whole would be to commission an interpretation plan for the whole site. But before that occurs the strategic planning and management for the two entities – the Burke Museum and the Historic Precinct - need to be firmly linked.

This would be done most effectively under the expert eye of an experienced museum team led by the Museum and Heritage Services Manager.

There are substantial benefits in integrating the management of the two entities. It would meet the objective articulated in the ISC Plan 2006-2010 of facilitating “the provision of integrated arts and cultural activities”. It would maximise staff resources and expertise across the Museum and precinct, particularly with regard to administration, exhibitions, collections management, educational programs and managing public access. It would also mean that museum expertise and advice could be made available to those venues such as the Forestry Collection and Post and Telegraph Office where the displays and collection management programs are not of a satisfactory standard.

The alternative of keeping the Museum and Historic Precinct in separate administrations runs the risk that the Historic Precinct will be run down in the same way as is now happening with the Burke Museum. There are already signs of this with a decline in Precinct gate takings over the last two financial years.

Furthermore, the opportunity to provide a cohesive historic precinct, incorporating the Burke Museum, of which the entire community can be proud, would be lost.

From the Museum & Heritage Services Manager down, staff should be encouraged to consider the Burke Museum and the Historic Precinct as one entity, and this should be reflected in all policy and planning programs.

### **RECOMMENDATION 1.3:**

- The operations of the Historic Precinct be integrated into the Robert O’Hara Burke Museum.**

#### **Purpose of the Robert O’Hara Burke Museum**

While the Museum was established in part as a memorial to former citizen and explorer Robert O’Hara Burke its purposes and the environment it operates in are far different nowadays than then.

For many years it has been part of Indigo Shire Council and also has the legacy of other developments that have taken place around it. In 2001 a project set out to develop a heritage tourism product.

That product, as finite and perishable as it is, has tended to overshadow the Museum – an ongoing organisation.

The issue that really needs to be considered is that, in developing a product and providing a series of venues in a precinct, Indigo Shire Council has established the skeleton of a “museum without walls” which functions from various venues.

In Europe and elsewhere these are known as Ecomuseums and are managed as living museums. Ecomuseums also rely on strong governance and professional expertise to be sustainable.

While the cash comes through the tills, in its present form the Beechworth Historic Precinct is not sustainable and is deficient in the same areas as is the Robert O’Hara Burke Museum.

All organisations need a clear identity with stated aims that are understood by the membership and those who work for the organisation whether in a paid or unpaid basis. Everyone needs to know and understand why a museum exists.

The first place to start when developing a policy framework for a museum is the purpose for the museum which sets down its broad aims. For a municipal museum the Local Government Authority's Corporate Plan should encompass this in terms of the organisation structure within which the museum operates.

Indigo Shire Council has a Mission Statement and the municipal museum needs a subsidiary Statement of Purpose which is consistent with the parent body's goals. The best mission statements and statements of purpose are brief and to the point.

A museum's statement of purpose needs to focus on how the museum will contribute to achieving the parent body's mission.

**A number of statements of purpose for Robert O'Hara Burke Museum are in circulation. None seem to show a link or to acknowledge consistency with the Mission of the parent body (Indigo Shire Council).**

Museums sometimes also have a Mandate which qualifies their statement of purpose.

The Mandate will identify the range of cultural material for which the museum assumes responsibility which may be stated in terms of:

- An academic discipline
- Geographical range
- Chronological range
- Specialisation
- The relationships of the mandate to other institutions concerned with the same subject.

The Mandate not only establishes the museum's mission in the objective world of public responsibilities, but also lays the foundation for the museum's relations with other institutions – governmental, educational and private sector, as well as other museums.

**A Mandate for Robert O'Hara Burke Museum would need to include relationships with nearby bodies such as Yackandandah Museum and the relationship with state bodies such as that established with Museums Australia (Vic) through the Museum Accreditation Program.**

### **Understanding, Agreeing and Sharing Purpose is Essential**

It is absolutely fundamental to the success of any organisation to have a clear and shared understanding of why the enterprise exists and what it is supposed to be doing, be it the Burke Museum or the Indigo Shire Council.

If there is not this understanding, it is impossible to set goals, to make plans or to control the enterprise. Inappropriate and conflicting actions will be taken, scarce resources wasted, and the clients of the enterprise (and its ultimate proprietors) - the ratepayers and residents – will be ill served.

Statements of mission and/or mandate must be brief, clear and understandable, and they must be couched in terms which make them easy to follow AND allow work to be evaluated for consistency with those statements.

It is not sufficient for the mission and mandate to be defined. They must be agreed upon by ALL the stakeholders, from highest management of the Shire to the newest

and rawest volunteer. To borrow from military parlance, everyone must be “on the same net”.

ALL activities, existing and proposed, must be judged against the mission and mandate. If they are inconsistent, they should not proceed – OR – it may be time to revisit and, perhaps, to update the mission and mandate, which are hardly immutable over time.

If a decision is taken to embark in a direction that is contrary to the aims of an organisation then it has to be asked whether the organisation’s aims are out of date or whether those making the decision are out of line. Obviously, such decisions should not be taken lightly as they challenge the fundamental reasons for the organisation existing and require the opportunity for input from the broader membership and/or other sections of the organisation.

#### **RECOMMENDATION 1.4.**

- Statements of purpose for the Robert O’Hara Burke Museum and the Beechworth Heritage Precinct be reviewed with a view to the possibility of a common purpose being defined and their management as a single ongoing entity being considered for development and adoption.**

#### **Policy Framework**

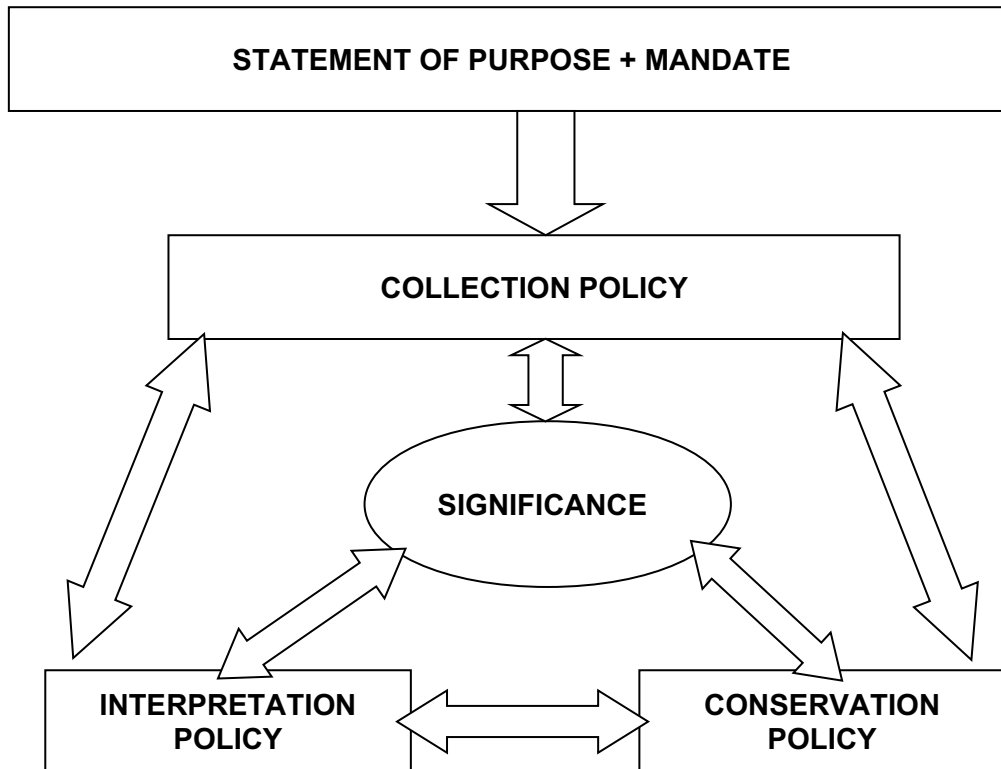
All policies need to be developed to be consistent with a museum’s role and its organisational environment.

In the case of museums which are operating units within a parent organisation, as is the Robert O’Hara Burke Museum, the policies adopted also need to be consistent with the stated purposes of the Museum and the stated mission and vision of the parent body.

There are three broad groups of policies which should be included in any museum policy framework:

- Collection Policy
- Conservation Policy
- Interpretation Policy

All policies for museums spring from the institution’s core Statement of Purpose which is by necessity generally peculiar to that institution alone. Museum policies need to be tailored for specific institutions and should not just be copied from those of another organisation.



Central to all of these policies is an important common link – **Significance**:-  
Museum policy makers and those who apply policies need to consider these questions

- If items are not significant - should they be included in a collection?
- If items are not significant should scarce resources be committed to their conservation?

If items are not significant should priority be given to their interpretation?

#### **RECOMMENDATION 1.5:**

- A policy framework consistent with the Robert O’Hara Burke Museum’s purposes be considered by the Museum Management Advisory Committee. The revised policy framework and museum policy statements would then be recommended for adoption by Council and flagged for review at an agreed date.**

## **.2 Organisation**

### **Management**

We have argued that the Robert O’Hara Burke Museum is a museum of national significance. We are convinced that the decision to abolish the position of museum director was ill-considered and is directly responsible for a number of the problems the Museum is currently experiencing.

In order to meet the essential standards one would expect of this museum and to provide leadership to other heritage resources in the Shire, particularly the Heritage

Precinct, The establishment of a professional museum manager, to be titled Manager, Museum & Heritage Services, is essential and of top-most priority. This person would have extensive museum management experience, preferably in a variety of environments. He or she would report directly to the General Manager, Sustainable Communities and would provide invaluable input to other areas of the portfolio's operations.

### **RECOMMENDATION 2.1.**

**A professionally qualified and experienced Manager Museum and Heritage Services position be established to report directly to the General Manager Sustainable Communities and to oversee staff of the Robert O'Hara Burke Museum and Historic Precinct.**

#### **Professional Staff**

In her submission to the review, Collection Management Officer Linda Peacock noted that in 2001, the Burke Museum had the following staff:

- Manager (4 days)
- Collection Manager (3.5 days)
- Exhibitions and Public Programs Manager (2.5 days)
- Researcher (2-3 days)
- Museum Assistant (2.5 days)

The present staff complement is as follows:

- Collection Management Officer – re-titled position, hours reduced (3 days)
- Museum Assistant (3 days – hours increased)
- Front-of-house position (3 days)
- Cataloguing Officer (5 hours).

This represents a dramatic depletion and in effect, the diminished staff positions and numbers mean that it is not possible for the Museum to achieve its Vision and Mission, either as they now stand or as we propose.

At an appropriate time, following the appointment of the Manager, existing positions should be closed (with the exception of front-of-house staff) and positions should be created for the following staff:

- Curator (Part Time): a professionally trained person with collections management experience and expertise.
- Education and Programs Officer (Part Time). We regard it as essential that this position be re-created. The person should be a professionally trained educator, preferably also with museum experience which includes evaluation projects and programs. This position would also oversee front of house staff.
- Archivist (Part Time). Reporting to the Curator, this person would primarily be responsible for supervising archival research, as well as assisting with collection management and evaluation projects.

- Visitor Services Co-ordinator – establishment of this position will essentially entail a transition in responsibilities for the existing Historic and Cultural Precinct Co-ordinator position and will be responsible for supervision of an integrated Front of House Team of attendants/guides.
- Attendants/guides. These positions would be combined with the Front of House Team for the Historic Precinct. The projections of staffing required assume that the current level of front of house supervision needs will be covered by attendant/guides across the museum and precinct venues. These positions are likely to continue to be largely part-time but the precise structure will await the appointment of the Manager Museum & Heritage Services and any further reviews of seasonal/scheduled opening hours. It should be noted that the Front of House team will need to be responsible for all front-of house activities; other Museum staff will need to devote all their time to their own duties.

We believe that at this stage at least, it would be unnecessarily disruptive to declare the front-of-house positions vacant as well.

Administrative support should be provided by the Sustainable Communities portfolio.

Marketing and promotional support should be provided by the Department of Tourism & Marketing.

## **RECOMMENDATION 2.2.**

- The positions of Curator, Education and Programs Officer and Research Officer be re-established with responsibility respectively for collections management, education and evaluation, and supervision of access to the archives.**

### **Staff deployment and training**

No museum has the resources to “be all things to all men”. The currently depleted staff have struggled valiantly to keep things going, but it has been a losing battle. It is essential that the incoming manager and staff, as well as the Museum Advisory Committee, focus their attention to ensure that critical services are maintained and that less attention is paid to those which, while desirable, may be beyond the Museum’s resources.

### **Services which are essential**

- Provide one of the few remaining examples in Australia of a classical 19<sup>th</sup> century museum in a purpose built (and Heritage-listed) building, with collections to match. Those components of the museum and building which contribute towards this 19<sup>th</sup> century character are of national significance and should be preserved. They provide a service to the entire Australian community. Arguments demonstrating this are detailed in APPENDIX II THE ROBERT O’HARA BURKE MUSEUM: ITS COLLECTIONS AND THEIR SIGNIFICANCE (see page 52)
- Provide exhibitions and collections relating to the history of Beechworth over a period of 150 years. This is an essential service to the community of Beechworth, to people who have an historical connection with Beechworth, and to people with an interest in historical research. It’s also essential for school students – we make the value judgment that they should know

something about their own history. Programs and facilities associated with this service need to be improved.

- Provide an exhibition service to visitors to Beechworth, and is a leading visit-or attraction at Beechworth. Provides visitors to Beechworth with a snapshot of the history of the town and district, with the opportunity for those interested to explore further. It is an essential part of Beechworth's tourism infrastructure. Programs and exhibitions need to be improved.
- Provide archival services. The Museum is one of three recognised places of deposit for archives in Victoria, and is probably the only site in Beechworth with a suitable environment to house them. If the Museum relinquishes this service it is likely that the State PRO will take the records back to Melbourne. It is essential that they stay at Beechworth. Programs for managing the archives and providing appropriate access to them need to be reconsidered.
- Form part of a suite of visitor attractions incorporating the town and historic precinct. This should continue and indeed, be further developed. Physical links between the two sites should be strengthened by redesigning the path from the VIC to the Museum's front entrance, and by creating activities in the vacant parkland to the north – perhaps a café.
- Manage collections – registering and cataloguing the Museum's collections. It is essential that the Museum have accurate records on its collections, how and when they were acquired and where they are now. It needs to have appropriate acquisition and deaccessioning policies and procedures. Without these, the organisation cannot function effectively as a museum.
- Provide a research service to the public on request. This work is ongoing, and there is a continuing demand for it. However, the way it is done needs to be changed. The research service to the public should be done in-house by Museum staff, not by an outside consultant. The Museum should set the priorities for doing this work, and provide the facilities for its own staff person to do it.

#### **Services which are desirable**

- Provide family and local historians and other researchers with access to its archival material. Facilities and procedures for providing this service need to change and scheduling of access to the archives needs to be considered.
- Provide educational outreach services for schools
- Provide changing exhibitions –there are currently too many, and they are on too small a scale. This activity should be scaled back, to allow staff to concentrate on other, more important tasks.
- Support the activities of the Friends of the Burke Museum, who themselves provide support to the Museum and to the public, and a creative outlet for interested community members.

#### **Services which are not desirable**

- A program of short-term changing exhibitions that has the potential to drain resources and exhaust staff. The program envisaged in current plans could not be supported by even a much larger and better resourced institution.

It will be an important early task for the new Manager to examine the human resources that are available against these priorities and to propose to the Museum Advisory Committee a revised structure for delivering services.

We further note that the existing personnel, while having the best will in the world, do not always have the training and skills essential to the performance of the range of current and emerging museum functions. This can be overcome by establishing a staff structure (see APPENDIX V STAFF STRUCTURES AND DUTIES page 63) capable of sustaining operations and developing and delivering services. Staff classifications need to be not only consistent with Council's staffing framework but also with the professional skills and qualifications required to carry out the duties required of the positions.

### **RECOMMENDATION 2.3.**

- A new staff structure, including additional skill sets, is essential for the Museum to operate in a sustainable way and for Council to ensure that it is meeting its collection management responsibilities.**

#### **Relationship with External Bodies - *Friends of the Burke Museum***

*Friends of the Burke Museum* is an independent community based not for profit body.

*Friends of the Burke Museum* have proven to be a great source of community goodwill and support for the Museum. We would encourage this independent body to continue to operate.

However, we are led to believe that, in the absence of senior staff at the Museum, the *Friends of the Burke Museum* has tended to become involved in operational and policy roles. This is entirely inappropriate. There should be clear lines of direction from Council to senior Museum staff, with the external body of course being welcomed to assist the staff and Advisory Committee as needed and directed.

Museum Friends groups elsewhere commonly work closely to assist senior museum staff at their direction. In return they normally receive benefits such as discounts in cafes and shops, privileged access to staff and collections, and opportunities to preview exhibitions.

The present *Friends of the Burke Museum* current Constitution does not make mention of its purpose; we encourage the group to rectify this at the earliest opportunity. An example is given below from the Web page of the Friends of the National Museum of Australia:

*The Friends' primary aim is to support, work in partnership with, and promote the National Museum. As an incorporated organisation, Friends also play an important role as an advocate and lobby group for the Museum.*

Ideally the role of *Friends of the Burke Museum* should be re-defined in parallel with the development of the Interim Strategic Plan for Museum Services.

There is clearly a possibility that the Friends and Advisory Committee could find themselves at cross-purposes. In the event of any significant disagreement or dispute, the views of the Advisory Committee and Council as governing body will of course prevail.

**RECOMMENDATION 2.4:**

- ☑ **The Manager, Museum & Heritage Services lead a process of consultation with the Friends of the Burke Museum to negotiate appropriate roles and contributions the Friends will have in future in relation to the Museum.**

**.3 Planning and planning processes**

The success of any enterprise, whether it be as small as a Scout troop or as large as a national government, depends upon strong governance, leadership and management. These need to be built around three elements

1. **POLICIES AND PLANS**, including a strong sense of mandate and mission; a sense of where the enterprise now is and where it wishes to go in the future; realistic and measurable strategies by which the enterprise moves from one to the other, and the operational plans, milestones and targets that guide operations along the way.
2. **INFORMATION ON PERFORMANCE**, which tells the enterprise how well (or not) the policies, strategies and plans are being implemented and pursued. Information is required to gauge not only economy and efficiency but, in particular, effectiveness, impacts and results in both the short and long term.
3. **ACCOUNTABILITY AND DECISION-MAKING** frameworks and processes to compare the information to the policies and the plans and take the necessary actions to eliminate failures and reinforce successes.

- ☞ **The Burke Museum and the management structure in which it currently operates are deficient in all three of these areas.**

**Strategic and operational planning**

As flagged, at present Robert O'Hara Burke Museum is operating without essential elements of a policy framework that need to be in place before planning can proceed. Until purpose is defined valid goals cannot be determined let alone the milestones to their achievement etc.

In planning, it is essential to have both a long-range vision of where the Museum should be going, and those short-term plans needed to operate on a day to day basis.

Strategic plans look at the current situation and where the institution should be, several years into the future. It sets long-range goals and describes the strategies by which it intends to pursue those goals. Strategic planning also describes how the organisation will measure the degree to which those strategies are successful in achieving the goals.

Strategic planning is virtually absent from the Burke Museum and we have seen only limited evidence of it being carried out elsewhere in the Shire. The Manager, Museum Services should lead the strategic planning exercise.

A possible action plan is provided in Part IV of this report (see: A Possible Action Plan page 42). The action plan provides a basic roadmap to assist Council to work towards establishing a planning framework.

**RECOMMENDATION 3.1:**

- ☑ **Council consider the action plan provide by the consultants as a means of establishing a planning framework for museum and heritage services**
- ☑ **An Interim Strategic Plan should be developed and approved as an initial step.**

**Strategic and Operational Planning**

The Manager, Museum and Heritage Services and the museum staff will have a great deal of work to carry out within the next few years. Having an interim strategic plan is important to get things moving in the right direction, but this will become outdated in fairly short order. Strategic planning is essential and should be undertaken every few years.

The Museum currently prepares operational plans. Future plans will need to be made consistent with the strategic plan to ensure that optimum support is given to the strategies that will help the Museum achieve its goals.

**RECOMMENDATION 3.2:**

- ☑ **The Manager Museum and Heritage Services lead periodic revision of the Interim Strategic Plan and development of a series of Operational Plans for consideration by the Museum Management Advisory Committee. These plans would then be recommended to Council for inclusion in the Indigo Shire Council Corporate Plan and implementation.**

**Interpretive Plans**

Neither the Vision or Mission statements - nor, for that matter, the Museum's Exhibition Policy - acknowledge that component of the Museum which we believe to be the most significant – its classic 19<sup>th</sup> century displays. We believe that statements recognising their importance should be incorporated in all three documents. In particular, rather than refer to "Beechworth's past", the Mission statement should be to the effect that: "the Burke Museum is a community museum which offers a window into Australia's colonial past as well as the history of Beechworth". Corresponding modifications should then be made to the SWOT analysis (under "Strengths") and Strategy Three (Enhancing Communication and Marketing).

The Action Plan needs to be taken a step further. Upon appointing appropriate staff, the ISC should commission an **Interpretation Plan**, which would review interpretation not only at the Museum, but also across the Historic Precinct and town.

The present policy should be expanded to include some consideration of interpretive principles, access and learning styles. It should also incorporate an **Interpretation Strategy**, to demonstrate how the principles and policies will be implemented.

Some of the displays have outlived their usefulness, and the floor space at the Museum needs to be re-configured. An interpretation plan should be commissioned for the Museum and historic precinct. Later in this report we recommend as part of such a plan that a section of the current displays be removed to free up much needed space for more contemporary and relevant displays. The interpretation plan should make recommendations for changes in all the precinct venues – only the

displays in the Courthouse are at an acceptable standard. (NB – we weren't able to see the Chinese Protectors Office)

We visited the other venues forming part of the Historic Precinct – the Courthouse, Post and Telegraph and Forestry displays. We assessed the exhibitions against the *National Standards for Museums and Galleries*<sup>7</sup>. Our conclusion was that for the present, both the Burke Museum and the Courthouse Museum would meet the standards – although both, particularly the Burke Museum, could still be improved – but that the other venues would not. In particular, we considered that they do not meet the following benchmarks:

- BENCHMARK B2.1.1      The museum's significant collection areas, themes or stories are outlined in a written policy or plan.
- BENCHMARK B2.1.2      Exhibitions, displays and activities are changed to attract and interest new audiences and repeat visitors, using a variety of collection items, themes and stories.
- BENCHMARK B2.1.3      A variety of methods are used to present stories, exhibition themes, and the collection, to museum audiences.

An interpretation plan will point to ways in which these deficiencies could be tackled. We consider it essential that the brief for the Interpretation Plan incorporate all museums in the Precinct. There is no reason why the museums not under Council control could not be given direction as to what is required to enable them to meet the standards.

We have noted references to an interpretation plan for the Historic Precinct. This plan should be reviewed, updated and made consistent with the interpretation plan for the Burke Museum. Indeed, we believe that a single interpretation plan covering both would be highly advantageous.

The Exhibition Policy also proposes a large-scale program of changing exhibits – four to six major exhibitions and four to six smaller-scale exhibitions per year. This would be a major undertaking for a large museum; for a small country museum it is unmanageable. One of the main purposes of temporary exhibitions is to attract repeat visitation to the Museum, particularly from the local community, including schools. Given that the Museum's total visitor numbers per year are around 15,000, there is no reason to do it more than once or twice yearly. A reduction in temporary exhibitions of this kind would free up valuable staff time for other work while at the same time – if suitably promoted - still attracting the same audience in approximately the same numbers.

An examination of the list of proposed exhibitions for the current year indicates that topics are not always related to the museum's stated purpose. It is critical that all exhibitions and programs of the museum to be consistent with its approved mission and priorities, to maintain the museum's strategic purpose and avoid it degenerating into a cabinet of curiosities. A clear and realistic interpretation plan, consistently applied, will assist the museum to do this.

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<sup>7</sup> See Standards and Benchmarks page 4

**Recommendation 3.3:**

- Current means of interpretation at the Museum be reviewed and an Interpretation Plan be developed as soon as possible.**

It is beyond the scope of this report to develop an interpretation strategy. That is a job for the consultants who develop the Interpretation Plan, in consultation with the Museum Manager. But we *do* want to make some suggestions:

**Entry Point**

We have considered three alternatives: leaving the entry point where it is; creating an entry at a point along the northern wall; and making an entry at the rear of the building. We are in favour of keeping the entry where it is, for the following reasons:

- It has always been where it is and is therefore historically consistent
- It opens onto the vista of the natural science (birds) display and the Burke Memorial Window – two of the Museum’s signature exhibits
- The present reception area, with its counter, small office to the rear and proximity to the sales area makes it a suitable point for entering and exiting the Museum.
- To make an entry point elsewhere would entail considerable expense and capital works. Provided a suitable walkway for streaming visitors to the entry can be achieved, it is unlikely that visitor numbers would be adversely affected.

The major disadvantage of any relocation for the entry is that the Museum would lose the vista of the Birds display and Memorial Window. We consider these to be defining elements of the Museum and hence critically important. One of the main challenges for the Interpretation Plan will be to design a walkway which will attract visitors to the existing entrance.

**Visitor Flow**

Once inside the Museum visitors would move into the main hall and natural history room, working either clockwise or anti-clockwise depending on the exhibits they particularly wish to see. These areas would provide the 19<sup>th</sup> century components of the exhibitions.

Visitors would then move into the gallery now designated as the “Street of Shops”, thence on to the second gallery and Exit. These areas would incorporate the 20<sup>th</sup> century and contemporary exhibits. Visitors would then have an opportunity to browse for souvenirs and books in the sales area before exiting through the main entrance. Visitors with mobility problems could be guided to the alternative exit in the opposite corner of the building.

The area designated as the third gallery would be converted into the Museum’s Archives and Public Research area, and partitioned as needed to provide additional office space.

Other major changes we suggest for the Interpretation Strategy are:

*Reconfigure the internal space for display, research and administrative functions.*

The main reason for this is that it will be essential to create some additional floor space in the Burke Museum to enable it to carry out its display and archival functions effectively. To achieve this, some exhibitions will have to go. The “Street

of Shops” is the most suitable candidate for removal. It’s fair to say that this exhibition is now looking tired. It has been open to the public for over thirty years and can now be said to have run its course. While it is not unattractive and does serve an educational purpose, its historical authenticity is limited to the objects exhibited, and these could be displayed in other ways. Furthermore, display sets such as the streetscape and associated “buildings” are not historically accurate replications of the original Beechworth streetscape. Hence, they are of no historical significance. It is also incongruous to have a re-created streetscape inside when the original, authentic streetscape still exists outside.

### **Contemporary Approaches to Exhibition Planning in the 21st Century**

From the point of view of display techniques, period streetscapes are offered in many museums throughout Australia. The gold story and associated streetscapes and objects, for example, are represented more dramatically and effectively at Sovereign Hill. There are many “pioneer villages”, of which Swan Hill is one of the best and best-known examples.

We believe that it would be preferable for the Burke Museum not to continue along this path. Rather, it could use contemporary display techniques in the area freed up by removing the “Street of Shops” displays to tackle other topics specific to the history of Beechworth, particularly in the 20<sup>th</sup> century – war, sport and recreation, the Depression, the growth of agriculture, market gardens and other small businesses, town history and development, notable personalities and very recently and tragically, bushfires. Displays on these topics, in modern style and supported with multimedia, would provide a balance to the classical 19<sup>th</sup> century “antiquarian” displays and round out the overall picture of the history of Beechworth. At the same time they would allow the Museum to maintain a very strong 19<sup>th</sup> century element which is still its defining feature. With this approach, the Museum would be shining a light on the more recent past and present, and possibly the future, rather than simply harking back to the “glory days” of the goldmining and bushranging eras. After all, there’s more to Beechworth than goldmining and Ned Kelly!

The floor space freed up as a result of these proposed changes could then be used for research and administrative functions – discussed elsewhere in this report. Our suggestion is that the third gallery would be closed to display and converted to research and office space.

### **RECOMMENDATION 3.4:**

**The “Street of Shops” exhibition be removed.**

## **.4 Information Collection**

Museums keep various documents and data to keep themselves operating – policies, procedures, visitor surveys, budgets and reports. Systematic collection of data will permit the Museum to evaluate the impacts and effects of its programs. In the case of tourism, for example, for the Museum it is particularly important to collect information on actual and target clients with respect to demographics, perceived needs and satisfaction with services and programs provided.

Policies provide a reference point for goals and actions. Goals generate strategies which can in turn be broken down into one or more tasks, which can be assigned to staff or volunteers as required. At times it will also be necessary to allocate resources for the task, and it should be possible to produce a measure for that task

and more broadly, measures which tells the enterprise how well (or not) the policies, strategies and plans are being implemented and pursued.

Information is required to gauge not only economy and efficiency but, in particular, effectiveness, impacts and results in both the short and long term.

### **Visitor research**

We were struck by the lack of information on visitors, actual and potential, that is required for effective planning, program delivery and marketing.

Three kinds of information are required:

#### Demographic information

- Where do the clients live? If they are tourists, what languages can they use?
- How old are they?
- What gender?
- How do they travel to the museum or historic precinct?
- How much time do they spend here?
- What else do they do while in the area?
- Do they visit singly, or in groups? If in groups, what is the typical composition of a group?
- How do they make the decision to visit or not to visit?
- What information sources do they use?
- Are they “first-timers” or repeat visitors? If the latter, how frequently do they visit?

#### Perceived needs:

- What do they expect from the visit?
- What interests them most? Least? Why?
- How much are they interested in learning something, as opposed to being entertained?
- How do they want to obtain information?
- Do they have special requirements (e.g., are they handicapped in any way?)

#### Satisfaction:

- How well did the visit meet their expectations?
- What did they like best and why? Least, and why?
- Would they prefer different experiences (ways of communicating)?
- How well did we cater to their special needs?
- What do they want that we are not giving them?
- What impact are we having on them (e.g., do we provoke them into wanting to learn more about something? Do they tell their friends about the museum?)

Without these kinds of information on hand, it is very difficult to:

- Plan exhibits, programs, temporary exhibitions and special activities
- Market effectively
- Justify the value obtained for every dollar invested by the Shire or anyone else.

Research must be carried out systematically to yield usable results and it must be done repeatedly over the years to allow the museum, marketing and tourism authorities to see how the population, its needs and satisfaction may be changing, and make appropriate adjustments in an effective and timely manner.

The Shire should not consider contracting out all this research, as the cost would be prohibitive. The Shire should consider hiring a competent researcher to train the staff of the museum, the Heritage Precinct and the tourism authority, to plan, conduct and use simple surveys and the information they produce.

#### **RECOMMENDATION 4.1:**

- In 2009/10 the Manager Museum and Heritage Services lead development and execution of a regular program of research on visitors, actual and potential, to inform program development and marketing and to lay the basis for evaluation.**

#### **Evaluation**

Accountabilities and decision-making frameworks and processes are established so that the performance of the enterprise can be periodically checked against the plan. Performance indicators are the tools for measuring progress, e.g. 4 exhibitions and 30 school visits over the year; two highly significant collections items professionally conserved per year; a 5% increase in attendance figures. In addition, specific jobs can be delegated to particular staff, as has occurred with the *Updated Action Plans, 2007*. However it isn't clear whether the results of this Action Plan have been reviewed: it was evident to us that several of its stated goals had not been met. We should add that we attribute this to a lack of staff, and an inappropriate staff structure, rather than to any shortcomings on their part.

If parts of the plan are not proceeding as per the timeframe, the person to whom that particular task has been delegated should explain why. If, for example, the task is no longer seen as a priority, the plan should be modified accordingly. If it is still a milestone or target to be achieved, the staff person should make it a priority. On the other hand, if the task has been achieved successfully within the time frame, and the result has been a demonstrable improvement in the performance of the enterprise, the person responsible can be recognised and/or rewarded, and the way has been cleared for that person to move onto the next milestone or target.

While ongoing programs of visitor research and performance measurement are indispensable, it is also necessary to stand back, from time to time, and take a hard look at specific program areas. There are essentially four questions to be answered:

- Rationale – does what we are doing make sense?
- Objectives achievement – are we doing what we set out to do?
- Impacts and effects – what is happening as a result of this program or activity?

- Alternatives – are there better ways of achieving the objectives than those we currently use?

To not subject programs and activities to periodic evaluation is to risk continuing putting scarce resources into things that have outworn their utility or effectiveness or to make critical decisions on the basis of unsupported assumptions or suppositions. Either way, the effect is to waste scarce resources and prevent the museum from responding in a timely, effective and efficient manner to the challenges of both present and future.

There are several ways of obtaining the information needed to evaluate programs, including:

- Reviews of comments, suggestions and other material on file
- Unobtrusive observation of visitor behaviour
- Surveys
- Focus groups
- Depth interviews
- Peer reviews
- Longitudinal studies.

Again, one could spend large sums on consultants to conduct evaluations, but anyone can apply the logic behind these four questions. It is beyond the mandate of this study to develop an evaluation policy and plan, but the Heritage Advisory Committee should consider this issue and require evaluations to be conducted as required.

#### **Recommendation 4.2:**

- The Manager, Museum and Heritage Services, as soon as practicable, develop and institute an adequate program of regular performance measurement and periodic evaluation of the most critical components of the Museum's work. These processes should be capable of indicating the contribution of the museum to the community and its sustainability, and monitoring progress in achieving operational objectives and advancing strategic goals.**

It is only when accurate, timely and credible information is available that the Manager, Museum Services; the Museum Advisory Committee; and the Shire Council can satisfy themselves that progress is being made and goals achieved – or to take effective decisions to either redirect operations or revise goals and strategies – the third leg of the tripod on which management depends.

## **.5 Standards and Benchmarks**

Museums are publicly accountable bodies and as with Local Government Authorities are expected to be ethical organisations and to aim to comply with national standards and benchmarks.

Unlike the situation for libraries in some states, at present there are no benchmarks for museums in Australia specific to Local Government. The benchmarks against which museological factors were assessed are national:

- *Caring For Our Culture National Guidelines for Museums, Galleries and Keeping Places*. Museums Australia (1998).
- *National Standards for Australian Museums and Galleries* (September 2008)<sup>8</sup>.
- *Australian significance assessment guidelines for cultural heritage collections*<sup>9</sup>.

Increasingly, museums will be measuring their performance against the benchmarks set in the National Standards for Museums, Galleries and Keeping Places. (See: [http://www.collectionsaustralia.net/sector\\_info\\_item/107](http://www.collectionsaustralia.net/sector_info_item/107))

The National Standards for Australian Museums and Galleries Benchmark A1.4.1 flags the need for museum governing bodies to adopt either the Museums Australia or ICOM code of museum ethics. These codes cover, inter alia, such matters as: the institutional base of the museum; the need for appropriate financial resources and personnel; the role of museums in holding primary evidence, collecting and research; the need to communicate openly and effectively with the museum's audiences; the need to collaborate with the communities in which they are based; and the need to have an appropriate legal framework.

#### **RECOMMENDATION 5.1:**

- The Museum Management Advisory Committee consider the National Standards for Australian Museums and Galleries with a view to:**
  - **recommending the Australian National Standards for Museums and Galleries to Council for adoption as targets to aim for;**
  - **recommending the ICOM Code of Ethics to Council for adoption**
  - **committing to ongoing participation of the Museum in the Museum Accreditation Program operated by Museums Australia (Victoria) as a means of progressing achievement of the national standards.**

#### **Other standards**

The Robert O'Hara Burke Museum's collections include archive items it is responsible for. In addition to its own collections, others are held on behalf of agencies such as the State Records Office.

While the Archives Domain is also within the Collections Sector, the national professional body (Australian Society of Archivists) has not as yet adopted a set of national standards – instead the Archives Domain generally relies on relevant ASO and ISO standards<sup>10</sup>.

<sup>8</sup> This package has been developed by a taskforce including: Collections Council of Australia, Museums Australia Victoria, Museums & Galleries Services NSW, History Trust of South Australia, Western Australian Museum. The final version is expected to be adopted as a national package in the third quarter of 2008. It is anticipated that the standards will be adopted by state and territory accreditation programs (such as the MAP scheme operated by Museums Australia Victoria)

<sup>9</sup> The standard methodology for assessment of significance to be used is based on four primary criteria and five comparative criteria. For further details see: [http://www.collectionsaustralia.net/sector\\_info\\_item/62](http://www.collectionsaustralia.net/sector_info_item/62)

**RECOMMENDATION 5.2:**

- As national standards for archival collections do not at present exist, the Museum Management Advisory Committee consider developing and adopting suitable policies and standards for archive collections for which the Robert O’Hara Burke Museum is responsible.**

**Cultural Protocols and Access**

In 2005 Australia’s principal museum organisation, *Museums Australia*, formally adopted a document, *Continuous Cultures, Ongoing Responsibilities*. This document was designed to assist museums in shaping their policies in relation to managing objects of Indigenous cultural heritage.

The document sets out a number of principles, many of which are relevant to the Burke Museum, for example:

- Recognition that Aboriginal and Torres Strait Islanders are not one homogeneous group, and that some Indigenous people will have direct links to the place they live while others live elsewhere.
- Indigenous people should have the opportunity to have input into how museums store, conserve, research and interpret and display Indigenous collections.
- Authority for the protection of secret and sacred items belongs to the traditional custodians or their descendants.
- Stories associated with objects are as important as the actual objects and must be treated with equal respect.
- Indigenous people have a right to know what items of their cultural heritage are held in museum collections.
- Indigenous people retain full rights to their cultural heritage both in respect to Australian intellectual property laws as well as customary laws.

The Burke Museum holds significant Aboriginal and Fijian items, and needs to be aware of these protocols. Advice should be sought from Indigenous people in order that the Museum manage its Indigenous collections appropriately.

Museum Victoria has experts on its staff who can advise on appropriate ways to manage both Aboriginal and Torres Strait Islander, and other ethnographic collections. In consequence we recommend that the Museum seek advice, initially from Museum Victoria, on approaches it might take in this aspect of its collections management.

**Recommendation 5.3**

- That the Manager, Museum & Heritage Services approach Museum Victoria for advice on the appropriate management of its Indigenous and ethnographic collections.**

**.6 Collections Management**

The current Vision, Mission and Action Plans are supported by the Museum’s application for Accreditation under the Victorian Museum Accreditation Program (MAP). This last document provides the most comprehensive overview of the Museum’s collections management policies.

For the most part the Plans are very good. If acted upon, the collection documentation and preservation policies should help ensure that it will be possible to continue to draw upon the collections in perpetuity. The most obvious gaps are:

- The Vision and Mission do not draw attention to the 19th century objects which form the most significant component of the collections. This requirement is spelled out in the National Standards:

BENCHMARK C1.1.1      *Key collection areas are based on the museum's Statement of Purpose, key topics, themes and stories, and the communities it serves.*

- It does not take account of the need to assess the significance of acquisitions, proposed or accepted (although significance criteria are implied in the acquisition criteria at (5.2)). This requirement is specified in the National Standards thus:

BENCHMARK C1.2.1      *Decisions about acquisitions, deaccessioning, and care of the collection are informed by significance assessments.*

BENCHMARK C1.2.2      *The significance of selected individual collection items is investigated and documented.*

#### RECOMMENDATION 6.1:

- Strategic plans and priorities recognise the 19th century collections as the most significant - nationally significant – component of the Robert O'Hara Burke Museum's collections.**

#### Collections Storage

- Storage facilities are unsatisfactory. This is not addressed in the documents but again it is a critical issue. The store in the Burke Museum is small and relatively cramped, but is still manageable. However the store (because the word "store means different things to different people, from now on in this report we will be using the term "repository") at the rear of Harry Power's cell is not acceptable: it is cramped, dusty, with many objects being inaccessible or impossible to locate; boxing and protection of objects is inadequate; there is no environmental monitoring. In addition, there is no control over access. In effect, the Museum fails to meet a number of benchmarks in the National Standards with regard to storage.

We regard it as essential that a satisfactory repository be found for the Museum and Historic Precinct collections. It does not have to be onsite, but it would be desirable for it to be in reasonable proximity (say up to 1 km away). Our viewing of the collections, both on display and in storage, suggest that an area of about 200m<sup>2</sup> would be desirable. The repository should have as many as possible of the following characteristics:

- As stable an environment as can be achieved without air conditioning, through the use of insulation to ceilings and walls.
- A temperature generally within the range 18-22° C
- Relative humidity within the range 45-60%

- Light and ultra-violet levels which do not exceed 500 lux and 75 microwatts per lumen
- Ensuring that water, dust, insects and pollutants are excluded as far as possible
- Not storing items on floors, and using layers of storage – shelving, Tyvek, acid-free tissue, boxes, plan cabinets and rollers within cupboards – to provide further buffers against extreme conditions. It is also important to introduce a regime of checking regularly to detect any problems sooner rather than later
- Storage areas should be clean and well-ventilated
- The repository should not have any water, drainage or steam pipes, particularly at ceiling level
- A smoke detection system is desirable but preferably not a sprinkler system, since water can cause as much damage as fire to most objects
- Where objects have been stored for a long time in a temperate zone such as that of Beechworth, and have remained stable, it is important not to change the environment suddenly to meet ideal conditions; the change could do more harm than good.

#### **RECOMMENDATION 6.2:**

- The Indigo Shire develop a suitable repository for the collections held in both the Robert O’Hara Burke Museum and the Historic Precinct.**

There is no policy on resolving issues of copyright. This is a critical issue, particularly for photographs. Federal legislation following the Free Trade Agreement with the United States has had a dramatic impact on copyright, with the copyright of intellectual property now extending 75 years beyond the death of the creator from 1 January 1955. Again, this requirement is specified in the National Standards:

BENCHMARK C1.5.3      *Legal requirements are addressed, along with ethical and other protocols, before any digitisation process begins. (Legal requirements include adhering to the laws of privacy, copyright, intellectual property and moral rights).*

#### **RECOMMENDATION 6.3:**

- Ensure that copyright issues surrounding items in the collection, or acquisitions, are formally resolved.**

Given the Museum’s limited space, it is critical that selective acquisition be employed. Only those objects of most direct potential benefit to achieving the Museum’s purpose should be acquired.

#### **RECOMMENDATION 6.4:**

- The collections policy include statements to the effect that the Museum will incorporate assessment of significance of the item into its acquisition criteria.**

## **.7 Interpretation and learning**

The Vision and Mission does not reflect the importance of education as a key purpose. This is only covered in a separate *Education Policy*, which “acknowledges a public educational responsibility as fundamental to its operations and activities”. The policy is directed to all the Museum’s audiences, not just school groups, and this is in line with the recommendations of the Victorian Museum Accreditation Program. In addition to programs for school groups, the Policy sets out programs of public lectures and events as well as school projects. There is also one program for people with physical and intellectual disabilities, a Memories activity in the “Street of Shops”.

The Policy should be expanded to take account of audience needs: according to Maslow’s hierarchy of needs, engagement and learning can only take place once people’s basic needs have been met. For museums, these needs include physiological needs: (Where are the toilets? Where can I sit down/find something to eat or drink?); safety needs: (is it safe to go into this part of the site/ Can I find my way round the site?); and social needs: (am I allowed in here? Is it OK to touch this object? I only have limited time – how long will this experience take?).

### **Access and the Disabled**

The Policy should also consider disabled access more broadly: providing space for people in wheelchairs to move comfortably; providing a variety of information channels so people with hearing or visual disabilities can participate; and including rest areas in exhibitions. It’s also desirable to provide a clear structure and narrative to the visit so that visitors can gain a sense of storyline, which they can successfully navigate through according to their needs, interests and time constraints.

### **Learning Styles**

The Policy should recognise that there is a variety of learning styles which people bring to informal settings such as museums, heritage centres, parks and zoos. For example the “4 Mat” learning styles model, originally developed by Kolb and McCarthy, is based on people’s varied preferences for different learning behaviours such as “doing”, “watching”, “feeling” and “thinking”, and proposes four main types of learners:

#### **Imaginative learners**

- Seek personal meaning
- Learn by listening and sharing ideas
- Characterised by the question “Why?”
- Enjoy social learning opportunities

#### **Analytical learners**

- Seek facts and expert knowledge
- Learn by thinking through ideas
- Characterised by the question “What?”
- Enjoy self-directed learning opportunities

#### **Common sense/problem solver learners**

- Need to know how things work

- Learn by testing theories
- Characterised by the question “How?”
- Enjoy hands-on learning opportunities

### **Dynamic learners**

- Seek hidden possibilities
- Learn by trial and error, self-discovery
- Characterised by the question “What if?”
- Enjoy simulations and role-play learning opportunities.

The implication in this is that while people can't be rigidly categorised, there is a wide range of approaches to learning. As a result, content should be presented in a variety of ways.

The position of Education and Programs Officer no longer exists. Without a person fulfilling this role, it is impossible to consider the issue of communication in the manner prescribed by the Education Policy, either as it now stands, or with the modifications proposed in this report. We regard it as essential that this position be filled.

### **RECOMMENDATION 7.1:**

- The Interpretation and Education Policies be expanded to take account of visitor needs and learning styles.**

## **.8 Marketing and promotion**

The lack of information on actual and potential visitors hobbles the effectiveness of marketing and promotion, It is essential to identify the main characteristics of the different groups of visitors, so that marketing can be precisely targeted at the right people, in the right places, via the most effective means. Excellent examples of how to do this kind of market segmentation study can be obtained from the Museum of Victoria, where they were first conducted more than fifteen years ago. Without market segmentation information, it is impossible to plan an effective, economical marketing program; one can only employ a wasteful “shotgun” approach.

### **The Audience**

The current Marketing Plan does not define the audience, actual and potential, for the Museum. The Visitor Survey proposed in the Strategic Plan does not appear to have been carried out. Neither has the proposed street survey of visitors to the Beechworth township, and this is more critical.

In the absence of detailed information about Museum visitors, we offer some general comments about categories of museum visitors below:

#### ***General Leisure Visitors***

These visitors have a general, rather than specialised interest in things heritage or historical. For them, the heritage site is primarily a setting for them to share an experience They will come as individuals or in groups, especially family groups, and will take things as they come during their visit, rather than seeking to move around the site in any pre-planned order. They are looking for entertainment rather than education. They are most likely to regard the visit as having been a success if they

have enjoyed themselves, engaged with some of the interpretation and particularly if they or their children have learned something.

We would predict that visitors from the “General Leisure” category are likely to make up about 65-75% of the total visitation to the precinct.

### ***School Groups***

These groups will be taking part in a formal educational process with their teachers and any education staff from the site, often together with accompanying parents. The visits are normally arranged in advance by teachers, who visit the site and plan lessons, together with any offsite education staff, linked to specific focal points.

Success will be gauged by the teacher based on the extent to which the visit met their objectives for visiting the site (e.g. covered the necessary curriculum areas; provided experiences which cannot be duplicated in the classroom; students' immediate reactions; any follow-up testing or activities).

The students also represent a potential group of ongoing users in the future and many heritage sites have cited examples where students who have visited during the week returned with their parents on the weekend.

Typically, visits in organised school groups comprise around 10% of the total number of visitors (exceptions are those which attract a disproportionately high number of tourists, or alternatively those who focus their efforts specifically on the schools market).

### ***People with personal or family connections to the site (VFR)***

The Museum has the advantage of being strongly identified in the community's mind as an important historical site. People living in reasonable proximity to the Museum may form a significant proportion of repeat visitors to it (if the inertia surrounding visiting attractions “on your doorstep” can be overcome – special events are one way of doing this). If a high-quality experience is offered, they are also likely to bring visiting friends and relatives to the Museum to engage with the sense of history, place and community it embodies.

This audience group is likely to regard their visit as a success or failure depending on their view of the way the site is being managed and interpreted as a whole, and how the interpretation responds to any particular specialisation or interest. They will presumably be interested in any information or interpretation which directly addresses their family or personal connections. Approximately 10-15% of the total visitor numbers are expected to come from this group.

One would think that the same should hold true for the Heritage Precinct, since it and the Museum exist “cheek by jowl”. Having a heritage precinct with high-quality exhibits and interesting, varied programs, echoing similar offerings in the Burke Museum, would create a town centre of which all residents of the Shire would be justly proud and which they would want to show off to their friends and visitors from outside the Shire.

Unfortunately, our site visit and interviews did NOT suggest that this was the case and we observed the heritage precinct to be almost empty of visitors – of any kind.

While our brief did not include an examination of the Heritage Precinct, *per se*, we have noted above that a number of the deficiencies that plague the museum also exist in the heritage precinct. The most economical and effective solution is to place

the two under the same head and to create the kind of town centre that will increase civic pride and draw in visitors – of every description.

### ***Specialist Visitors***

Local historians, academics, people with an interest in industrial archaeology, science or anthropology, social history, built heritage and the like will come to the Museum, irrespective of how it is marketed or promoted. They can be expected to continue to revisit as long as their specialised interest continues to be met. They will judge the success or failure of their visit in terms of the ways the interpretation and preservation activities meet their particular interest. While they are a significant visitor group, forming a pool of potential volunteers and “champions” for the Museum, they will probably constitute no more than 10% of the total visitor numbers.

In our opinion this profile of visitor types is likely to hold true for visitors to Beechworth and its museums, historic sites, suggesting that the prime audiences are: general leisure visitors; school groups; and people with personal or family connections to the site.

With such diversity of audiences, it follows that museums should try to offer a broad range of experiences and interpretive media to cater for these different groups and provide a varied learning experience for all.

### **Recommendation 8.1:**

- The Marketing Plan be revised to more effectively target selected groups and locations.**

### **Converting town visitors to museum visitors**

One issue that stands out in our review of the Museum is the low conversion rate of visitors to the town, against visitors to the Museum - currently about 3% of the total (17,000 of 600,000). It is clear most visitors don't go to Beechworth specifically to visit the Burke Museum or, for that matter, the Historic Precinct.

Two possible ways of building visitor numbers, therefore are: to increase general awareness about the Museum and Precinct, so that more visitors come to Beechworth with the specific intention of paying them a visit; and providing better signage and way-finding clues at Beechworth.

Specific ways of addressing this issue aren't given in the Strategic Plan, but they are offered in the Draft Marketing Strategy: Burke Museum – 2008: devising a plan of marketing activities around regular events/exhibitions; identifying key drawcards; attracting media coverage, and better exploiting the possibilities offered by the Website; improved signage/way-finding to Burke Museum, for example a sign outside the VIC from Ford Street and another brown tourism sign in Loch Street (although we believe that the sign would be better placed at the southern end of the town on Bridge Street). We support these proposals.

Our other suggested change to the Marketing component of the Strategic Plan, and the Draft Marketing Plan, is to produce a single brochure for both the Burke Museum and Historic Precinct, rather than individual ones. The Burke Museum should be given the prime position in the brochure. Similarly, Web promotion should link the Museum and Historic Precinct – again with the Burke Museum being given the prime position. Not only is it desirable to promote the two as a single entity;

doing so generates a critical mass not possible when the two entities are promoted separately.

The Museum should continue to produce promotional flyers as required for accreditation in the Victorian Museum Accreditation Program.

#### **RECOMMENDATION 8.2:**

- Signage and way-finding to the Burke Museum be installed, near the entrance to the town on Bridge Street, and outside the VIC.**

### **.9 Access to Museum Services and Operating Hours**

From the point of view of the visitors, two main services are provided: access to the Museum's displays, and access to the archives - these rely upon behind the scenes operations most visitors never see.

#### **Access to the Museum Displays**

Some of the main concerns for museums regarding access to the displays, in particular disabled access, have been discussed above at p. 31. For most visitors, the main job for museums is to provide a friendly and courteous reception to visitors, provide them with any information they might need to negotiate their way around the site, and let them enjoy the experiences the museum has to offer.

In times of budget constraint, museums also need to consider opening hours. After all, there is no point in being open and meeting all the attendant costs involved, if nobody comes.

While we could make recommendations on opening hours, we believe that it is more appropriate for the newly-appointed staff to make these decisions. The principles we believe should be considered are those of seasonality, and times of peak and low visitation during normal open days. Obviously, if few or no visitors come before 11 am or after 3 pm, it is worthwhile considering restricting opening hours – instead of 10 am to 5 pm, the Museum could experiment with opening at 10.30 am and closing at 4 pm. Of course, seasonality needs to be considered in this context as well. If visitor numbers are very low in winter, for example, consideration should be given to restricting opening hours – perhaps to the afternoons, or closing on Mondays and Tuesdays for example. In these instances it would still be desirable to provide access to the Museum by telephone during normal business hours.

#### **Access to the Archives**

The Museum is one of three places of deposit for the State Public Records in Victoria. As a result, it holds extensive collections of archival material relating to Beechworth and north-east Victoria. In a submission to the review Anne Hanson noted that these records include newspapers, public records including municipal rate books, and court and mining registers, church and cemetery records, reference books, family history files and publications, and 19<sup>th</sup> century Beechworth directories. She added that it also holds, *inter alia*, school registers, Government Gazettes and Year Books, historic photographs and oral history tapes and transcripts.

From time to time it has been suggested that the archives could be housed elsewhere in Beechworth. However, the Victorian PRO has resisted such suggestions, normally on the basis that the proposed alternative sites are not suitable repositories for archives, and that they might not be satisfactorily managed.

(Officers from the PRO, for example, rejected a proposal to relocate the archives to the Sub Treasury building because that building has wooden floors and would consequently pose an unacceptable fire risk).

We believe that it is essential that these records remain in Beechworth – for the most part, the place where they originated. This would be greatly preferable to seeing them taken to Melbourne. We therefore consider that they should remain in the Burke Museum.

The present Access Policy statement provides an excellent set of ground rules for the provision of access to the archives. However, the Museum itself lacks adequate facilities and staff to manage access appropriately.

We have made recommendations elsewhere to the effect that the present configuration of floor space needs to change. Part of the reason for this is so that a satisfactory public archives space needs to be created. While we do not intend to specify in this report where this public space should be located, we do say that it should incorporate the following:

- Adequate desk space for four or five members of the public to work at the one time, in the one area.
- A supply of pencils, cotton gloves and archive boxes to ensure that items are properly handled.
- A staff member who can assist in providing members of the public with appropriate access. For the most part, this would be the job of the Research Assistant. At other times, the work should be handled by front-of-house staff or, if essential, by either the Curator or Education and Programs Manager.

We consider the present scale of fees for research work on the collections in response to public enquiries is appropriate. However, we do not believe that this work should be handled by an outside consultant, as is presently the case. Once appropriate staff have been appointed, the Museum should resume control of this work. If work pressures make it necessary to continue to engage a consultant from time to time, the consultant should be engaged by the Museum on a case-by-case basis. The consultant should then be required to invoice the Museum, rather than the Council, for this service, with the funds coming from the Museum's operating budget. A decision on whether it is necessary to engage such a consultant should be the prerogative of the Manager.

#### **RECOMMENDATION 9.1:**

- That the Museum's floor configuration be changed in order to accommodate a single area for providing the public with access to its archives, under supervision.**

#### **RECOMMENDATION 9.2:**

- That the Museum handle research enquiries in-house as far as possible, only engaging an outside consultant when other work pressures make it essential to do so.**

## PART IV IMPLEMENTING THE RECOMMENDATIONS

### ***Options***

We believe that the Shire of Indigo has three options.

a. Close the museum and dispose of the contents

The project brief, strategic documents on Council's website and on-site discussions all emphasised Shire management's concern with escalating costs. Council's main strategic planning document stresses the need to economize and control costs.

If financial considerations outweigh all others in the minds of Council and its managers, one solution that deserves consideration is to save a significant amount of salary, operating and capital dollars by closing the museum entirely and disposing of its valuable collection to other appropriate institutions, possibly the Museum of Victoria. However, we question whether this would be acceptable to the population of the Shire.

b. Maintain the status quo

Doing nothing is always an option. Were this to happen, we foresee continued deterioration of conditions at the Burke Museum, which would eventually create an even greater storm of public protest. The Museum's budget has been cut in the past to find funds for other priorities. Unfortunately the situation could arise again where the same "logic" is applied to the Heritage Precinct, leading to the deterioration of the Heritage Precinct in the same manner as has occurred with the Museum.

c. Rectify the problems

In our recommendations, and in the suggestions for their implementation and the action plan which follow, we propose a limited number of solutions that will not only restore the Burke Museum to the position of community gem it should occupy, but which will also result in very positive improvements to the Heritage Precinct and the ability of both "closed" and "open" museum components to serve as a source of civil pride and to draw in the revenue-generating public in ever-increasing numbers – both residents and visitors alike.

We are NOT suggesting massive organizational change, nor are we foolish enough to recommend resource reallocations beyond very modest ones, which we believe, are well within the ability of the Shire to provide. In the Action Plan, we have provided a sense of the relative priority of each of the actions we propose, as well as a means of spreading the implementation costs over a period of five years, to reduce the initial impact on Shire resources.

We would like to note that it has been suggested to us that there is perhaps a *fourth* option – that of transferring management of the Museum to another heritage body, such as Museums Australia or the Museum of Victoria.

We want to make it crystal-clear to all concerned that this is NOT an option. No one out there is going to come in and gracefully take the Burke Museum off your hands.

At the same time, we must point out that there *is* a range of financial support that is available from a variety of sources, national and state – BUT (and it is a big "but") these will only become of potential use to you when a professionally qualified manager for the Burke Museum is in place. Several museums within the state, such as Sovereign Hill and its Gold Museum, receive limited support from the Victorian

Government and there is every reason to hope that the Burke Museum, properly reconstituted, could eventually join this group.

As well, the new state priorities aimed at creating sustainable communities, while still in its nascent stages, can be expected to be a source of some financial support. Again, it will only be forthcoming when the museum is put on a healthy footing – and, if that includes the heritage Precinct, it is reasonable to expect such support to extend to it as well.

We recognize that the recommendations we have made will cause change, to a limited degree, to the organization of Shire heritage operations and, especially, to the way in which the museum and other heritage assets in the Shire operate. We also appreciate that they will cost money. As the Shire recognises, this is inescapable. We have done our best to cast these at the lowest possible level of expenditure, consistent with achieving the necessary results.

We could have made numerous recommendations – but we have ONLY made those which we are convinced are required to place the Shire of Indigo on a footing comparable to other local governments within the state with effective, yet efficient and economical heritage operations.

### **Comparisons**

For purposes of comparison, the following table includes financial data from three other Local Government Authorities within the State of Victoria.

#### **Financial Comparisons between LGAs with Substantial Heritage Assets**

| Shire                        | Population | Revenue from Ordinary Activities | Expenses from Ordinary Activities | Capital Works |
|------------------------------|------------|----------------------------------|-----------------------------------|---------------|
| Yarra Ranges Shire           | 145,000    | \$122,251,922                    | \$117,200,576                     | \$34,208,280  |
| Macedon Ranges Shire         | 38,360     | \$41,035,000                     | \$36,827,000                      | \$13,065,000  |
| Swan Hill Rural City Council | 22,000     | \$41,719,000                     | \$41,652,000                      | \$9,566,000   |
| Indigo Shire                 | 15,238     | \$20,359,000                     | \$21,602,000                      | \$10,047,000  |

#### **Comparative Current Expenditures and Revenues for Museum Operations**

| Shire                | Operating Expenditure     | Percentage of Total Council Expenditure | Revenue     |
|----------------------|---------------------------|---|-------------|
| Yarra Ranges         | \$499,102                 | 0.4%                                    | \$309,680   |
| Macedon Ranges       | \$84,642                  | 0.2%                                    | \$5,450     |
| Swan Hill            | \$1,764,000 <sup>11</sup> | 4.2%                                    | \$1,275,000 |
| Indigo <sup>12</sup> | \$401,861                 | 1.97%                                   | \$226,610   |

<sup>11</sup> The Swan Hill Shire Capital Works Budget for 2008-09 included \$400,000 reinvestment in the Pioneer Settlement broadly in accordance with the Pioneer Settlement Masterplan. It also included \$60,000 for commissioning an interpretation plan. Initial operating savings will be directed into improve maintenance and replacement of assets and business development. Future savings will be returned to Council's bottom line.

<sup>12</sup> Includes Robert O'Hara Burke Museum, Historic Precinct and Visitor Centre.

## Projections

### Existing and Projected Budgets<sup>13</sup>

| <b>EXISTING<sup>14</sup></b>                     | <b>2008-09</b>   | <b>Year 1</b>    | <b>Year 2</b>    | <b>Year 3</b>    | <b>Year 4</b>    |
|--|------------------|------------------|------------------|------------------|------------------|
| Existing Museum Staffing                         | \$89,144         | \$89,144         | \$89,144         | \$89,144         | \$89,144         |
| Existing Precinct Staffing                       | \$151,631        | \$151,631        | \$151,631        | \$151,631        | \$151,631        |
| <b>Sub Total Staffing</b>                        | <b>\$240,755</b> | <b>\$240,755</b> | <b>\$240,755</b> | <b>\$240,755</b> | <b>\$240,755</b> |
| Existing Operations                              | \$161,085        | \$169,139        | \$177,596        | \$186,476        | \$195,800        |
| <b>PROJECTED TOTAL OPERATIONS &amp; STAFFING</b> | <b>\$401,860</b> | <b>\$409,914</b> | <b>\$418,371</b> | <b>\$427,251</b> | <b>\$436,575</b> |

| <b>PROPOSED<sup>15</sup></b>  | <b>Year 1</b>    | <b>Year 2</b>    | <b>Year 3</b>    | <b>Year 4</b>    |
|---|------------------|------------------|------------------|------------------|
| Manager Museum & Heritage Services Band 8 (F/T)   | \$72,000         | \$74,714         | \$77,550         | \$80,542         |
| Curator Band 5/6 (0.5T)   | \$23,273         | \$24,412         | \$25,589         | \$26,688         |
| Archivist Band 5 (0.4T)   | \$18,618         | \$19,530         | \$20,471         | \$21,350         |
| Education & Public Program Officer Band 5/6 (0.5T)  | \$23,273         | \$24,412         | \$25,589         | \$26,688         |
| Visitor Services Co-ordinator Band 4 (0.4T)   | \$18,074         | \$18,074         | \$18,074         | \$18,074         |
| Front of House Team (Band 3 ) P/T number to be determined <sup>16</sup>   | \$138,705        | \$138,705        | \$138,705        | \$138,705        |
| <b>Sub Total Staffing</b>   | <b>\$293,943</b> | <b>\$299,848</b> | <b>\$305,979</b> | <b>\$312,047</b> |
| Projected Operations  | \$169,139        | \$177,596        | \$186,476        | \$195,800        |
| <b>PROJECTED TOTAL OPERATIONS &amp; STAFFING</b>  | <b>\$521,871</b> | <b>\$537,414</b> | <b>\$553,650</b> | <b>\$570,256</b> |
| <b>Projected %<sup>17</sup> additional expenditure for proposed structure over and above existing structure</b> | <b>27%</b>       | <b>28%</b>       | <b>30%</b>       | <b>31%</b>       |

<sup>13</sup> The tables in this section are not precise but are sufficient to indicate likely orders of magnitude consequences of existing and proposed operating models.

<sup>14</sup> Existing staff projections costs include existing oncosts but don't include allowances for annual cost of living increases, while operations are projected on an assumption of an increase of 5% p.a.

<sup>15</sup> It is difficult to project oncosts for items such as Penalty Rates, Annual Leave, Long Service Leave, Sick Leave, Parental Leave, Superannuation, Workcover, Training, Uniforms, Protective Clothing etc. There will be some savings on items such as Long Service Leave, as well as some unanticipated expenses. For the purposes of this model we have projected oncosts at 20%.

<sup>16</sup> Savings achieved by front of house operations being carried out across sites by Band 3 staff.

<sup>17</sup> Percentages shown for each year indicate the percentage increase for that year under the recommended model as compared to equivalent projections for the existing operations model.

The tables clearly show that the financial implications of the model we are recommending are in line with acceptable practices elsewhere, in reasonably comparable jurisdictions with heritage/museum operations.

The total increase in cost to Indigo Shire projected would in the first year be in the order of 27% above expenditure under the current operation arrangement. Annual increases thereafter are projected to be in the order of 1-2% p.a. This should be expected to be offset in part by increased revenue from improved operations and an economic impact for the business community as well as prioritised objectives achieved for the Sustainable Communities portfolio.

Council and stakeholders should expect a good return on such a sound investment and to see returns that will not just be fiscal and which will include advancing the goals of the Sustainable Communities portfolio.

### ***Getting Started***

We recognise that there is a lot of work to be done and not that many people to do it. We recognise that the time demands on members of Council and others who will serve on the proposed Advisory Committee will limit their availability and that a very great deal hinges on the repositioning of the museum within the Shire organisation and upon the appointment of the best available Manager, Museum and Heritage Services the Shire can afford.

Realistically, we see full implementation of our recommendations as being possible only over a period of years – likely not fewer than five. It would be folly to try to do everything at once.

Implementation will have to be done in phases.

### **Essential First Steps**

There are a number of ways in which the implementation of recommendations could be phased, but, whatever happens, the following **MUST** take place as quickly as possible:

- creation of the Advisory Committee
- repositioning of the museum within the new organisational structure for Council staff
- appointment of the Manager, Museum and Heritage Services.

Implementation of the other recommendations can only take place once these three things have occurred.

### **Next Steps**

We have taken the liberty of suggesting a possible action plan – and we stress it is only A SUGGESTION, for phasing the implementation of our recommendations. In it, we reconfirm the relative priority of each recommendation indicated in previous sections of this report, and of the time it would realistically take to implement each. A number of the actions are dependent upon the prior completion of other actions.

### ***A Possible Action Plan***

|                        | 2009/10   | 2010/11  | 2011/12   | 2012/13  | 2013/14  |
|------------------------|---|--|---|--|--|
| <b>1. Governance</b>   | <ul style="list-style-type: none"> <li>- appoint Museum Advisory Committee</li> <li>- move museum to Sustainable Communities portfolio</li> <li>- integrate Heritage Precinct into museum management structure</li> <li>- revise museum statements of purpose (mission, mandate)</li> </ul> | Commence review of museum policies   | Continue review of museum policies  | <ul style="list-style-type: none"> <li>- review statements of purpose and revise if appropriate</li> <li>- complete review of museum policies</li> </ul> | Council to review changes in governance and adjust, if necessary   |
| <b>2. Organisation</b> | <ul style="list-style-type: none"> <li>- appoint Manager, Museum &amp; Heritage Services</li> <li>- appoint Curator;</li> <li>- appoint Education &amp; Programs Officer</li> <li>- appoint Archives Officer</li> </ul>   | <ul style="list-style-type: none"> <li>- review deployment of staff against interim strategic plan</li> <li>- assess adequacy of staff skill sets and develop training plan</li> <li>- commence re-definition of terms of reference for Friends of the Burke Museum</li> </ul> | <ul style="list-style-type: none"> <li>- implement training plan</li> <li>- complete development of terms of reference for Friends and implement</li> </ul> | <ul style="list-style-type: none"> <li>- review museum organizational structure and adjust, as required</li> <li>- training continues</li> </ul>         | <ul style="list-style-type: none"> <li>- training continues</li> <li>- review success of revised terms of reference for Friends and adjust if necessary</li> </ul> |

|                       | 2009/10  | 2010/11  | 2011/12   | 2012/13   | 2013/14  |
|-----------------------|--|--|---|---|--|
| <b>3. Plans</b>       | <ul style="list-style-type: none"> <li>- commence development of Interim Strategic Plan</li> <li>- develop annual operating plan</li> <li>- develop interpretation plan</li> </ul> | <ul style="list-style-type: none"> <li>- complete Interim Strategic Plan and begin to implement</li> <li>- develop annual operating plan</li> <li>- commence implementing interpretation plan</li> <li>- remove "Street of Shops"</li> </ul> | <ul style="list-style-type: none"> <li>- develop annual operating plan</li> <li>- continue implementing interpretation plan</li> <li>-</li> </ul>   | <ul style="list-style-type: none"> <li>- develop annual operating plan</li> <li>- continue implementing interpretation plan</li> <li>-</li> <li>-</li> </ul>                                      | <ul style="list-style-type: none"> <li>- develop annual operating plan</li> <li>- continue implementing interpretation plan</li> <li>-</li> <li>-</li> <li>-</li> </ul>  |
| <b>4. Information</b> | <ul style="list-style-type: none"> <li>- identify Museum's requirements for visitor information and commence collection</li> </ul>   | <ul style="list-style-type: none"> <li>- continue data gathering and analysis</li> <li>- commence development of performance standards</li> <li>-</li> </ul>   | <ul style="list-style-type: none"> <li>- continue data gathering and analysis</li> <li>- review methodology and adjust if required</li> <li>- complete development of performance standards and implement</li> <li>-</li> </ul> | <ul style="list-style-type: none"> <li>- continue data gathering and analysis</li> <li>- review performance against standards</li> <li>- develop evaluation policy and plan</li> <li>-</li> </ul> | <ul style="list-style-type: none"> <li>- continue data gathering and analysis</li> <li>- review performance against standards</li> <li>- review and adjust performance standards</li> <li>- implement evaluation policy and plan</li> <li>-</li> </ul> |
| <b>5. Standards</b>   | <ul style="list-style-type: none"> <li>adopt National Standards for Australian Museums &amp; Galleries and ICOM Code of Ethics as guiding standards and principles</li> </ul>      | <ul style="list-style-type: none"> <li>- in consultation with other archives within state, commence development of set of standards for Victoria's archives</li> </ul>   | <ul style="list-style-type: none"> <li>- continue development of archival standards</li> </ul>  | <ul style="list-style-type: none"> <li>- complete development of archival standards</li> </ul>  |  |

|                          | 2009/10   | 2010/11   | 2011/12  | 2012/13  | 2013/14   |
|--------------------------|---|---|--|--|---|
| <b>6. Collection</b>     | <ul style="list-style-type: none"> <li>- ensure all governance and planning documents recognize importance of museum's 19<sup>th</sup> century collections</li> <li>- identify planning parameters for developing new collections storage facility</li> </ul> | <ul style="list-style-type: none"> <li>- plan new collections storage facility</li> <li>- revise Collections policy to limit acquisitions and resolve all copyright issues</li> </ul>           | - build and occupy new collections storage facility  | -redevelop space currently used for collections storage                            |   |
| <b>7. Interpretation</b> | - commence revision of policies to ensure that they provide for visitors varying needs and learning styles and ensure integration into interpretation plan  | - restrict number of temporary exhibits to a more reasonable number   |  |  |   |
| <b>8. Marketing</b>      | <ul style="list-style-type: none"> <li>- install new way finding signage at strategic points in and around Beechworth</li> </ul>  |   | - revise marketing plans to take into account new visitor data collected commencing fiscal 09/10 | - commence collection of information on Potential visitors in selected communities |   |
| <b>9. Services</b>       | <ul style="list-style-type: none"> <li>- commence in-house conduct of research as a visitor service</li> <li>-</li> </ul>   | <ul style="list-style-type: none"> <li>- review service requirements and costs</li> <li>- reconfigure floor layout to provide a single space for visitor research and service access</li> </ul> | -  |  | <ul style="list-style-type: none"> <li>- conduct review of visitor research services, costs and funding options</li> <li>-</li> </ul> |

We have tried to space the implementation so that the resource requirements are also spread over time. If the availability of resources for implementing a program of market research or of building a new collections storage facility are scarce, the entire plan will take longer to complete. There is no magic formula; it is a question of making what progress one can with the resources available.

However, we believe we have given due consideration to the actual and potential resources of the Shire and to the possible acquisition of grants and other potential funding from outside the Shire and we are convinced that what we are recommending is the most practical and economical solution to the problems we were commissioned to examine and address.

**We said at the outset that we would remain available to advise and assist in the implementation of our recommendations. We want everyone to know that this was NOT an empty promise.**